LIFT

Community Action Agency, Inc.

Board of Directors Meeting

JANUARY 14, 2025 • 10:00 AM

HEAD START ADMINISTRATION OFFICE

1005 S. 5TH STREET - HUGO, OKLAHOMA

Our Mission:

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

Board of Directors and/or Executive Committee Meeting
LIFT Community Action Agency, Inc.
Tuesday, January 14, 2025 · 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unless and except for any item which any one of the Board desires to have discussion about at the meeting or withdrawn from the Consent Docket and handled individually in order immediately following the completion of the Consent Docket.*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 December 2024 Regular Meeting Minutes (*Organizational Standard 5.5*)

E. Consideration, Discussion, and Vote to Approve November 2024 Financial Reports; Distribution of December 2024 Financials for February 2025 Consideration and Vote (*OS 8.7*)

F. Consider Submission of Resolutions/Grant Applications, Vote to Approve – **$1,040,655**

1. FY 2025 Network NTI Training Grant & Lodging Benefit Application to NeighborWorks® America - ***$5,750***
2. Justice for Families Program Grant Application to U.S. Department of Justice, Office on Violence Against Women - ***$600,000***
3. Rural Business Enterprise Grant Application to U.S. Department of Agriculture, Rural Development & Signing of Authorizing Resolution - ***$99,999***
4. FY 2025 Community Services Block Grant Application (1st Allocation) to Oklahoma Department of Commerce/Community Development - ***$59,906***
5. Oklahoma Initiative Fund Application to Communities Foundation of Oklahoma - ***$15,000***
6. FY 2025 Flexible Impact Grant Application to NeighborWorks® America - ***$260,000***

G. Consider Acceptance of Grants/Contracts/Awards, Vote to Approve – **$187,489.68**

1. Oklahoma Early Childhood Program Grant Award (Year 19) from Community Action Project of Tulsa County - ***$181,239.68*** (*Match: $90,812.94*)
2. FY 2025 Network NTI Training Grant & Lodging Benefit Award from NeighborWorks® America - ***$5,750***
3. AmeriCorps Seniors Retired and Senior Volunteer Program Donation from Public Service Company of Oklahoma - ***$500***

H. Consideration, Discussion, and Vote to Ratify Executive Committee's Approval to Submit Revised Change in Scope – Enrollment Reduction Amendment Application for Head Start/Early Head Start Programs to the Office of Head Start

I. Consideration, Discussion, and Vote to Ratify Executive Committee's Approval to Submit Revised Change in Scope – Enrollment Reduction Amendment Application for EHS-Child Care Partnership Program to the Office of Head Start

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

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

L. Consideration, Discussion, and Vote to Re-Appoint Jeannie McMillin as LIFT CAA Equal Employment Opportunity Officer

M. Consideration, Discussion, and Vote to Approve LIFT CAA Equal Opportunity Policy Statement

N. Consideration, Discussion, and Vote to Approve Head Start/EHS/EHS-CC Cost Allocation Plan

O. Consideration, Discussion, and Vote to Accept 2025-2027 Community Needs Assessment/Report (*OS 1.2, 2.2 & 3.1-3.5*)

P. Board Training/Programmatic Report: Victim Services Programs, Review of Mission Statement (*OS 5.7 & 5.9*)

Q. Consideration, Discussion, and Vote to Approve Victim Services Programs Philosophy of Service Provision, Annual Program Goals, and Policies and Procedures Manual (*OS 5.7*)

R. Policy Council Report (*OS 2.1 & 5.9*)

S. Recognition of January 2025 Employee of the Month:
Taylor Dunn, Director – Second Chance Reentry Program

T. Recognition of Service Award
Ten Years: Adora Morris, Lead Teacher – Early Head Start Program

U. Other Reports/Announcements/Correspondence: HS/EHS/EHS-Child Care Monthly Reports (Program Summary, Communication and Guidance, Meals/Snack, Enrollment/Attendance, Data Analysis); Head Start/Early Head Start Programs' Change in Scope – Enrollment Reduction Amendment Approval; EHS-Child Care Partnership Program Change in Scope – Enrollment Reduction Amendment Approval; 2024 Holiday Food Basket Report; AmeriCorps Seniors RSVP Match Waiver Approval; National Stalking Awareness Month (*OS 5.9*)

V. 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*)

W. Consideration, Discussion, and Vote to Adjourn

Posted: _____ *Date:* _____ *Time:* _____

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

MINUTES
BOARD OF DIRECTORS MEETING
December 10, 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, December 10, 2024 at 10:02 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 (14 Board Members present, 11 absent). The following Board Members were present at the meeting site: Tami Barnes, Colby Bryant, Kristi Graham, David Hawkins, Andrea Henkel, Sharon Johnson, Vickie Leathers, Carolyn Pool, David Smith, Consuelo Splawn, Jim Bob Sullivan, Leah Thomas, Vicky Wade, and Craig Young. The following members were absent: Tiffany Brockway, Brad Burgett, Kevin Cory, Brent Franks, Patsy Guess, Jordan Hill, Jia Johnson, Kara Maness, Sandra Meeks, William Smith, and Debra Williams. LIFT CAA employees and visitors present at the meeting site were: Kinsey Cox, Rhonda Teague, Sheree Ensley, Dale Loughmiller, Rebecca (Reynolds) Porter, Macy Self, Johnny Moffitt, DeeDee Atwood, Tonya Finley, Raquel Lunde, Brittany Bailey, Alejondrina Sanchez, Branden Billy, Susie Mashburn, Kathy James, Darla Galyon, Jeannie McMillin, Jordan Mack, Mattie McKee, Johnny Driggers, and Amber Garman.

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

The Board recognized Sharon Johnson as elected representative for Washington Community Center, a Low-Income Entity on the LIFT Community Action Agency, Inc. Board of Directors (entity to expire 12/31/2027).

The Board recognized Kara Maness as elected representative for Kiamichi Family Medical Center, a Low-Income Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2027).

The Board recognized Carolyn Pool as elected representative for Antlers Community Food Bank, a Low-Income Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2027).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to accept Colby Bryant as appointed representative for Hugo Rotary Club, a Private Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2027). A motion was made by Tami Barnes and seconded by Vickie Leathers to accept Colby Bryant as appointed representative for Hugo Rotary Club, a Private Entity on the LIFT CAA Board of Directors. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item F).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to accept Kristi Graham as appointed representative for the McCurtain County Board of Commissioners, a Public Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2027). A motion was made by Tami Barnes and seconded by Andrea Henkel to accept Kristi Graham as appointed representative for the McCurtain County Board of Commissioners, a Public Entity on the LIFT CAA Board of Directors. The roll call vote was as follows: Yes 13; 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 accept Andrea Henkel as appointed representative for the Broken Bow Ministers Fellowship, a Private Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2027). A motion was made by Jim Bob Sullivan and seconded by Tami Barnes to accept Andrea Henkel as appointed representative for the Broken Bow Ministers Fellowship, a Private Entity on the LIFT CAA Board of Directors. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item H).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to accept Jordan Hill as appointed representative for Wright City Schools, a Public Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2027). A motion was made by Carolyn Pool and seconded by Jim Bob Sullivan to accept Jordan Hill as appointed representative for Wright City Schools, a Public Entity on the LIFT CAA Board of Directors. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item I).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to accept Jim Bob Sullivan as appointed representative for the Choctaw County Board of Commissioners, a Public Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2027). A motion was made by Tami Barnes and seconded by Craig Young to accept Jim Bob Sullivan as appointed representative for the Choctaw County Board of Commissioners, a Public Entity on the LIFT CAA Board of Directors. The roll call vote was as follows: Yes 12; No 0; Abstain 1. The motion carried. The Voting Record is attached (Item J).

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to accept Leah Thomas as appointed representative for the City of Hugo, a Public Entity on the LIFT CAA Board of Directors (entity to expire 12/31/2027). A motion was made by Vicky Wade and seconded by Vickie Leathers to accept Leah Thomas as appointed representative for the City of Hugo, a Public Entity on the LIFT CAA Board of Directors. The roll call vote was as follows: Yes 12; No 0; Abstain 1. The motion carried. The Voting Record is attached (Item K).

Sheree Ensley, Fiscal Officer, provided the Board with the Finance/Audit/Loan Committee Report. The Committee met on December 10, 2024 at 9:04 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 October 2024 and was presented with the November 2024 Financial Reports. The Committee was presented with and approved a proposal to increase rent amounts by 10% at Broadway Apartments, Boswell Apartments, Fort Towson Apartments, and Garvin Apartments, effective April 1, 2025 (pending approval from applicable funding sources). The cost of rent had not increased since 2017 at these properties, and the increase in rent revenue will be utilized to assist in covering rising operational expenses. The Committee received a property update concerning the sale of the Transit Building in Antlers, and the agency is also actively looking for additional office space to house LIFT's new programs.

CONSENT DOCKET ITEMS

CONSIDER APPROVAL OF MEETING MINUTES/FINANCIAL REPORTS

David Hawkins, Chairman, requested the Board's consideration, discussion, and vote to approve the November 2024 Regular Meeting Minutes and the October 2024 Financial Reports; the November 2024 Financials were distributed for consideration and vote at the January 2025 Board Meeting (Organizational Standards 5.5 and 8.7). A motion was made by Jim Bob Sullivan and seconded by Andrea Henkel to approve the November 2024 Regular Meeting Minutes and the October 2024 Financial Reports. The roll call vote was as follows: Yes 10; No 0; Abstain 3. The motion carried. The Voting Record is attached (Items M & N).

CONSIDER SUBMISSION OF RESOLUTIONS/GRANT APPLICATIONS

1. Child Care Stabilization Grant Program Application (Year 4, Early Learning Centers) to Choctaw Nation of Oklahoma, Child Care Assistance Program in the amount of $72,000; if awarded, these funds will provide key operating support to maintain child care services within the Early Learning Centers.
2. FY 2025 Healthy Start Initiative: Eliminating Disparities in Perinatal Health Grant Application (Continuation, Year 12) to Health Resources and Services Administration in the amount of $1,100,000; if awarded, these funds will be utilized during the second year of the five-year grant cycle to: 1) improve access to quality health care and services for women, infants, children, and families through outreach, care coordination, health education and linkage to health insurance, 2) build healthy communities and ensure ongoing, coordinated, comprehensive services are provided in the most efficient manner through effective service delivery, 3) strengthen the health workforce, specifically those individuals responsible for providing direct services, and 4) promote and improve health equity by connecting with appropriate organizations.

After discussion and Board Member input with regards to the applications presented, a motion was made by Andrea Henkel and seconded by David Smith to approve the submission of resolutions and/or grant applications in the amount of $1,172,000 presented as listed on the Consent Docket. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item O).

CONSIDER ACCEPTANCE OF GRANTS/CONTRACTS/AWARDS

1. Child Care Stabilization Grant Program Awards (Year 4/Quarter 1, Early Learning Centers) from Choctaw Nation of Oklahoma in the amount of $18,000; these funds for the first quarter of the Year 4 funding period will provide key operating support to maintain child care services within the Early Learning Centers.
2. FY 2025 Head Start/Early Head Start Program Grant Award (Continuation) from Administration for Children and Families, Office of Head Start in the amount of $2,307,266; this partial funding award will provide support for program operations and training/technical assistance for the Head Start and Early Head Start Programs for a period of one year (12/1/2024–11/30/2025), with a funded Federal enrollment of 435 children (387 Head Start, 48 EHS).
3. PY 2024 Department of Energy Weatherization Assistance Program Award from Oklahoma Department of Commerce in the amount of $293,075; these funds will be used to support LIFT's Weatherization Program and provision of services within Region 5 (Atoka, Bryan, Carter, Choctaw, Coal, Johnston, Love, Marshall, McCurtain, Murray, Pontotoc, and Pushmataha Counties).

A motion was made by Carolyn Pool and seconded by Jim Bob Sullivan to approve acceptance of grants, contracts, and awards in the amount of $2,618,341 as presented and listed on the Consent Docket. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item P).

DeeDee Atwood, Victim and Youth Services Director, and Kathy James, Senior Program Planner, provided a Board Training/Programmatic Report over the LIFT CAA Victim Services Programs and Evaluation (Organizational Standards 5.7 and 5.9). This training and evaluation is a requirement for the agency's Domestic Violence, Sexual Assault, Stalking Victim Services Program Certification through the Oklahoma Office of the Attorney General. The agency was granted temporary certification status in September 2019, and received full certification (for a three-year period) in 2021. Atwood introduced the staff of the programs and provided the Board with an overview of domestic and dating violence, sexual assault, and stalking. James reviewed the Victim Services Programs Policies and Procedures Manual, stand-alone policies and standards of conduct, which provide the basis for operations of the programs. The Manual was developed in accordance with the standards and criteria set forth in the Oklahoma Administrative Code, Title 75, Chapters 1 and 15, as well as information included on the DVSA Certification Review Forms and guidance from the Oklahoma Office of the Attorney General. James also reviewed the Mission Statement as well as the Philosophy underlying the standards and criteria for domestic violence and sexual assault programs (Oklahoma Administrative Code § 75:15-1-1.1), which is based upon voluntary services and individual self-determination. The approved Philosophy of service provision and Victim Services Programs Policies and Procedures Manual is made available to the community, staff, volunteers, and clients. James reviewed the programs and services (for each component) under the Victim Services Program Certification, which include: Court Appointed Special Advocates (established in 1997), Safe Place Healing Hearts (est. 2017), Safe Place Healing Hearts Too (est. 2021), and Victim Advocacy Services (est. 2015). James then reviewed the rules, standards, and criteria followed by these programs to ensure the multicultural needs of clients are met. She reviewed confidentiality standards/practices within the programs (including verbal confidentiality and client records); LIFT CAA's Victim Services Programs comply with both State

and Federal laws governing confidentiality and any exceptions to those laws. James explained client rights and grievance procedures, as well as legal and ethical issues faced by the Victim Services Programs. Additionally, program staff have undergone a great deal of training to help understand the complexities of domestic violence, sexual assault, and stalking, as well as the laws and ethics that impact this work. The programs also have a great network of partners that provide technical assistance when needed. James then reviewed the generalized goals for each program (initially approved by the Board in March 2019 and thereafter with the annual Program Evaluation and grant approvals), consistent with the existing goals and activities/work being conducted. However, to better demonstrate compliance with the standards, the program goals have become a standalone annual approval item by the Board, which last took place on July 9, 2024. James then presented the Program Evaluation and explained that an evaluation of LIFT CAA's Victim Programs' services, facilities, and policies and procedures is conducted each year. This assessment helps to identify special populations of victims who are underserved or have special needs. The annual Evaluation utilizes information derived from client service data, staff evaluations, the Advocacy and Supportive Services Feedback Form (Evaluation Template), surveys, and other programmatic information (such as reports submitted to funding sources, progress reporting, financial statements, etc.). The evaluation data is submitted to the Board for review and approval each year. James then provided an evaluation report for the Victim Services Programs for the period of July 1, 2023 to June 30, 2024. During this period, the programs served a total of 457 primary victims and 180 secondary victims. Primary victims by type of crime included: 98 adult physical assault, 11 adult sexual assault, 155 child physical abuse or neglect, 3 child sexual abuse/assault, 182 domestic, dating or family violence, 12 stalking/harassment, and 2 robbery. Each of these crimes were perpetrated against individuals in the service area (some clients had multiple categories of victimization). Of the new primary victims served (343), 84% were female and 16% were male. The majority of the new victims served were White/Caucasian (56%) and between the ages of 25-59 (54%), followed by American Indian/Alaska Native (26%) and the 0-12 age group (23%). In addition, 7% of total victims served had a cognitive, physical, or mental disability (31) or were Deaf/Hard of Hearing (1). There were also two victims served with limited English proficiency and 6% who were homeless. Clients of LIFT CAA's victim services programs were provided with emotional support, advocacy, emergency assistance, referrals, court accompaniment, and follow-up services as appropriate, in addition to comprehensive case management. Along with core program services, clients also received emergency food, medication, housing, and/or transportation assistance. Furthermore, 29 children within the CASA Program had their cases closed during the performance period, achieving reunification or safe placement. Based on program assessment of services and victims served/feedback, special populations of victims who are underserved or have special needs include victims of assault and those individuals with a disability or who have limited English proficiency. Client and partner interviews were conducted to evaluate the services provided. Of the program clients surveyed, 91% said the assistance they received was "very helpful" while 9% rated services as "helpful". Additionally, 100% of clients reported they knew more ways to plan for their safety and 99% reported they were more hopeful about their future. Most importantly, 100% of clients would recommend the programs. Furthermore, 100% of partners strongly agree they are satisfied with the programs, and find the programs to be helpful, to have increased their knowledge, and to have enhanced/improved their efforts and service to victims. With regards to evaluation of facilities, there were no issues found during the period of performance. All policies and procedures concerning the Victims Services Programs were reviewed during the performance period. Changes

were made to the Language Access Plan and Restrictions on Smoking in Facilities Policy, which were updated to reflect current operations, agency, and personnel changes. These changes were approved by the Board of Directors in August 2023. No other changes were made to the policies and procedures.

Kathy James, Senior Program Planner, requested the Board's consideration, discussion, and vote to approve the Victim Services Programs Evaluation. A motion was made by Andrea Henkel and seconded by Tami Barnes to approve the LIFT CAA Victim Services Programs Evaluation. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item R).

Brittany Bailey, ERSEA Specialist, requested the Board's consideration, discussion, and vote to approve the updated Integrated Services Policies and Procedures. In February 2024, the Board approved the 2024-2025 Eligibility, Recruitment, Selection, Enrollment, and Attendance Integrated Services Policies and Procedures with Prioritization Schedule/Point System. However, updates to the policies and procedures were necessary to align with the newly revised Head Start Program Performance Standards (as of August 2024) and upcoming effective dates for changes. Therefore, these updates to the Integrated Services Policies and Procedures (which includes the Prioritization Schedule) will be necessary to ensure continued compliance with Federal regulations/requirements of the Office of Head Start and the schedule of implementation effective dates. The proposed changes were reviewed in depth with the Board. A motion was made by Craig Young and seconded by Colby Bryant to approve the updated Integrated Services Policies and Procedures. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item S).

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

Susie Mashburn, Head Start/Early Head Start/EHS-Child Care Early Childhood Development and Curriculum Coach, provided a Board Training/Programmatic Report over the Head Start, Early Head Start, and Early Head Start-Child Care Programs' School Readiness/Child Outcomes Results for Fall 2024-2025 (Organizational Standards 5.7 and 5.9).

Darla Galyon, Head Start/Early Head Start/EHS-Child Care Director, provided the Board with a Programmatic Report over the upcoming FY 2025 Office of Head Start Focus Area 1 Monitoring Review (Organizational Standard 5.9). Galyon provided a comprehensive overview, explaining how the review will assess the agency's compliance with programmatic and operational standards, focusing on areas such as services to children, family engagement, and staff qualifications. Galyon outlined the preparation steps underway, including data collection and policy updates, to ensure readiness for the review. The Board was informed of the timeline for the review as well.

Jeannie McMillin, Transit Director, provided the Board with the Transportation Advisory Council Report (Organizational Standard 5.9). The Transportation Advisory Council was established during the April 2021 Board Meeting for the Transit Program with regards to funding received from the Kiamichi Economic Development District of Oklahoma's Area Agency on Aging Division. These KEDDO funds help to fill a gap in transportation services for older Americans (60 years of age or older) who do not qualify for Medicaid, Tribal, or other free transportation services. The Transportation Advisory Council regularly convenes each quarter, with a primary purpose to inform agency leadership of the transportation needs of older Americans within their communities, and serves an essential function in helping to identify and address transportation barriers, challenges, and resources. During the 14th meeting, held on December 10, 2024 (prior to the Board Meeting), Advisory Council members were briefed on the service results so far. In the last year, there has been a tremendous increase in service usage in all three counties, which went from 47 trips conducted in January 2024 to 351 trips completed in November 2024. Advisory Council members were also asked to report on any new or additional identified gaps in transportation needs in their communities; no such gaps were reported.

Andrea Henkel, Board Member, provided the Board Giving Report (Organizational Standard 5.7). To date, 17 of the currently seated 25 Board Members have provided a monetary donation to the agency during 2024. Achieving 100% of giving by the Board is the goal as it is an eligibility requirement by many private funders and foundations. Any amount is appreciated and ensures the agency's ability to apply for funds where Board giving is a threshold requirement. Board Members can designate what program or activity the donation is to be used for, and employees of the agency can also make donations on behalf of Board Members. Since the funding entity typically looks at the year prior, by achieving 100% Board giving in 2024, the agency is eligible to apply for funding in 2025.

Mattie McKee, Head Start/Early Head Start/EHS-Child Care Assistant Director, provided the Board with the Policy Council Report for the November 19, 2024 meeting (Organizational Standards 2.1 and 5.9).

Rebecca (Reynolds) Porter, Executive Director, recognized Alejondrina Sanchez (Employment Job Coach, Work Ready Idabel) as the December 2024 Employee of the Month.

Rebecca (Reynolds) Porter, Executive Director, recognized Johnny Driggers (Energy Auditor, Weatherization Program) as LIFT CAA's 2024 Employee of the Year.

Rebecca (Reynolds) Porter, Executive Director, recognized Wayne Hawkins (Park Manager, Clayton Lake State Park) for Five Years of Service.

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); District Attorneys Council/ Victims of Crime Act Grant Site Visit Summaries; and upcoming staff member retirement celebrations (Organizational Standard 5.9).

David Hawkins, Chairman, invited the presentation of New Business not known about or which could not have been reasonably foreseen prior to time of posting the Agenda, in accordance with *Title 25, Oklahoma Statute § 311*. Darla Galyon, Head Start/Early Head Start/EHS-Child Care Director, proposed New Business as follows:

Consideration, Discussion, and Vote to Approve LIFT CAA Personnel Policy No. 410: Standards of Conduct.

Galyon explained that the approval of Personnel Policy No. 410: Standards of Conduct was being introduced as New Business due to the need for timely action. At the time the December 2024 Board Meeting Agenda was posted, LIFT CAA's Personnel Policies were still under review by the agency's attorney (a months-long process that began in Fall 2024). After the agenda posting, it was determined that a formally-approved, revised policy would be necessary during the Focus Area 1 Monitoring Review by the Office of Head Start. While these updated practices were already in place, a formal, written policy had not yet been approved by the Board or Policy Council due to the review process. A formally revised policy would be needed to demonstrate compliance with the Head Start Program Performance Standards, which were updated in August 2024. With the upcoming Focus Area 1 Monitoring Review scheduled to begin prior to the January 2025 Board Meeting, it was imperative to address this matter under New Business during the meeting. Galyon then explained that the only changes being proposed were to the Standards of Conduct specific to LIFT CAA's Head Start, Early Head Start, EHS-Child Care, and Early Learning Center programming, and is applicable to all staff, consultants, contractors, and volunteers of the programs. The proposed changes to LIFT CAA Personnel Policy No. 410 were taken verbatim from the Head Start Program Performance Standards to ensure the programs are fully compliant with all requirements. As such, these changes would not require further review by the agency's attorney, as they are mandatory elements of the Performance Standards and are necessary for program compliance. Galyon reviewed the proposed changes as outlined and facilitated discussion by the Board. A motion was made by Jim Bob Sullivan and seconded by Tami Barnes to approve LIFT CAA Personnel Policy No. 410: Standards of Conduct as presented. The roll call vote was as follows: Yes 12; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item DD).

There being no other business to come before the Board, a motion was made by Tami Barnes and seconded by Jim Bob Sullivan to adjourn the regular meeting. The roll call vote was as follows: Yes 12; No 0; Abstain 0. The motion carried. Voting record is attached (Item EE).

The Regular Meeting adjourned at 11:19 a.m.

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Brad Burgett, Secretary/Treasurer

CALL TO ORDER: 10:02 AM

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

				V. WADE	V. LEATHERS	JB SULLIVAN	A. HENKEL	A. HENKEL	D. SMITH	C. POOL	JB. SULLIVAN	A. HENKEL	T. BARNES
	December 10, 2024	**Present**	**Absent**	K		M & N		O		P		R	
				Y	N	A	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	Kara Maness		✓																		
15	Sandra Meeks		✓																		
16	Carolyn Pool	✓		✓			✓			✓			✓			✓			✓		
17	David Smith	✓		✓			✓			✓			✓			✓			✓		
18	William Smith		✓																		
19	Consuelo Splawn	✓		✓			✓			✓			✓			✓			✓		
20	Jim Bob Sullivan	✓		✓			·		✓	✓			✓			✓			✓		
21	Leah Thomas	✓				✓	✓			✓			✓			✓			✓		
22	Vicky Wade	✓		✓			✓			✓			✓			✓			✓		
23	Debra Williams		✓																		
24	Craig Young	✓		✓					✓	✓			✓			✓			✓		
25	David Hawkins	✓																			
26																					
27																					

				C. YOUNG	C. BRYANT	JB SULLIVAN	T. BARNES	T. BARNES	JB SULLIVAN										
	December 10, 2024	**Present**	**Absent**	S			DD			EE									
				Y	N	A	Y	N	A	Y	N	A	Y	N	A	Y	N	A	
1	Tami Barnes	✓		✓			✓			✓									
2	Tiffany Brockway		✓																
3	Colby Bryant	✓		✓			✓			✓									
4	Brad Burgett		✓																
5	Kevin Cory		✓																
6	Brent Franks		✓																
7	Kristi Graham	✓		✓			✓			✓									
8	Patsy Guess		✓																
9	Andrea Henkel	✓		✓			✓			✓									
10	Jordan Hill		✓																
11	Jia Johnson		✓																
12	Sharon Johnson	✓		✓			✓			✓									
13	Vickie Leathers	✓		✓			✓			✓									
14	Kara Maness		✓																
15	Sandra Meeks		✓																
16	Carolyn Pool	✓		✓			'												
17	David Smith	✓		✓			✓			✓									
18	William Smith		✓																
19	Consuelo Splawn	✓		✓			✓			✓									
20	Jim Bob Sullivan	✓		✓			✓			✓									
21	Leah Thomas	✓		✓			✓			✓									
22	Vicky Wade	✓		✓			✓			✓									
23	Debra Williams		✓																
24	Craig Young	✓		✓			✓			✓									
25	David Hawkins	✓																	
26																			
27																			

ADJOURN: 11:19am

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

Pre-FY Close

FINANCIAL ROW	AMOUNT (AS OF DEC 2024)	COMPARISON AMOUNT (AS OF ADJUST 2023)	VARIANCE	% VARIANCE
ASSETS				
Current Assets				
Bank				
1000 - Cash				
1010 - Checking Account	$8,619,509.95	$9,869,414.41	($1,249,904.46)	-12.66%
1020 - Payroll Account	$9,316.68	$363,621.18	($354,304.50)	-97.44%
1021 - First United Accounts Payable	($15,280.36)	($34,318.47)	$19,038.11	-55.47%
1022 - First United TH Reserve	$146,854.26	$139,439.77	$7,414.49	5.32%
1023 - First United General Escrow	$178,390.15	$159,540.20	$18,849.95	11.82%
1024 - First United Marina License	$253.87	$240.82	$13.05	5.42%
1025 - First United Deposit (PayPal)	$2,115.20	$2,115.20	$0.00	0.00%
1028 - First United Unrestricted Funds CD	$849,505.41	$822,783.89	$26,721.52	3.25%
1030 - Shamrock Bank - Clayton	$1,854.10	$1,835.61	$18.49	1.01%
1040 - Petty Cash	$835.00	$410.00	$425.00	103.66%
1050 - McCurtain County National Bank	$6,449.31	$17,224.53	($10,775.22)	-62.56%
1070 - Fund to Fund Allocation Transfers	($0.03)	$0.00	($0.03)	0.00%
Total - 1000 - Cash	**$9,799,803.54**	**$11,342,307.14**	**($1,542,503.60)**	**-13.60%**
Total Bank	**$9,799,803.54**	**$11,342,307.14**	**($1,542,503.60)**	**-13.60%**
Accounts Receivable				
1100 - Receivables				
1105 - Accrued Acct Receivable	$236,339.57	$234,248.69	$2,090.88	0.89%
1110 - Accounts Receivable	$14,287.99	$1,592,863.67	($1,578,575.68)	-99.10%
1120 - Due From (A/R)	($2,714.20)	$269,370.66	($272,084.86)	-101.01%
Total - 1100 - Receivables	**$247,913.36**	**$2,096,483.02**	**($1,848,569.66)**	**-88.17%**
1300 - Other receivables				
1320 - Notes/loans receivable	$334,632.06	$335,515.82	($883.76)	-0.26%
1321 - Loans Receivable from Belmont	$217,351.48	$162,809.48	$54,542.00	33.50%
1322 - Loans Receivable from Clayton	$227,561.53	$202,957.53	$24,604.00	12.12%
1323 - Loans Receivable rom 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	**$1,477,020.30**	**$1,298,758.06**	**$178,262.24**	**13.73%**
Total Accounts Receivable	**$1,724,933.66**	**$3,395,241.08**	**($1,670,307.42)**	**-49.20%**
Other Current Asset				
1400 - Other assets				
1450 - Prepaid Expenses	$35,814.82	$26,628.16	$9,186.66	34.50%
1465 - Advances Paid	$128.60	$0.00	$128.60	0.00%
Total - 1400 - Other assets	**$35,943.42**	**$26,628.16**	**$9,315.26**	**34.98%**
1500 - Investments				
1530 - Property/Lots held for Sale	$375,516.35	$375,516.35	$0.00	0.00%
1599 - Undeposited Funds	$469.25	($1,048.76)	$1,518.01	-144.74%
Total - 1500 - Investments	**$375,985.60**	**$374,467.59**	**$1,518.01**	**0.41%**
NS097 - Interfund Due to /Due from	($0.01)	($0.01)	$0.00	0.00%
Payroll Float	$303,788.87	$0.00	$303,788.87	0.00%
Total Other Current Asset	**$715,717.88**	**$401,095.74**	**$314,622.14**	**78.44%**
Total Current Assets	**$12,240,455.08**	**$15,138,643.96**	**($2,898,188.88)**	**-19.14%**
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	**$19,365,542.36**	**$22,263,744.23**	**($2,898,201.87)**	**-13.02%**
Liabilities & Equity				
Current Liabilities				
Accounts Payable				
2000 - Payables				

FINANCIAL ROW	AMOUNT (AS OF DEC 2024)	COMPARISON AMOUNT (AS OF ADJUST 2023)	VARIANCE	% VARIANCE
2010 - AP Accrued monthly	($19,631.34)	($19,536.23)	($95.11)	0.49%
Total - 2000 - Payables	($19,631.34)	($19,536.23)	($95.11)	0.49%
Total Accounts Payable	($19,631.34)	($19,536.23)	($95.11)	0.49%
Other Current Liability				
2100 - Accrued liabilities				
2105 - Accrued Expense Payables	$19,400.61	$583,749.11	($564,348.50)	-96.68%
2110 - Wages Payable	$914,832.26	$352,669.53	$562,162.73	159.40%
2115 - Accrued Pension	$26,654.22	$0.00	$26,654.22	0.00%
2120 - Accrued Employee Benefits	$133,909.19	$312,530.75	($178,621.56)	-57.15%
2125 - Accrued Benefits	$67,348.99	$0.00	$67,348.99	0.00%
2130 - Accrued payroll taxes	($66,819.90)	$30,053.14	($96,873.04)	-322.34%
2131 - Accrued Taxes	$33,430.32	$0.00	$33,430.32	0.00%
2135 - Indirect Payable	$162,728.60	$76,297.76	$86,430.84	113.28%
2150 - Home Loan Escrow Accounts	($331.25)	($580.61)	$249.36	-42.95%
2160 - Due to (Liab)	$22,255.06	$10,117.70	$12,137.36	119.96%
2180 - Accrued Payroll Deductions	($8,549.60)	($7,601.21)	($948.39)	12.48%
Total - 2100 - Accrued liabilities	$1,304,858.50	$1,357,236.17	($52,377.67)	-3.86%
2400 - Refundable Advances	$30,338.25	$27,400.50	$2,937.75	10.72%
Total Other Current Liability	$1,335,196.75	$1,384,636.67	($49,439.92)	-3.57%
Total Current Liabilities	$1,315,565.41	$1,365,100.44	($49,535.03)	-3.63%
Long Term Liabilities				
2700 - Long-term notes & loans payable				
2770 - Long-term liabilities - Mower Loan	$482.99	$4,100.28	($3,617.29)	-88.22%
2780 - Lease liability	$727.94	$727.94	$0.00	0.00%
Total - 2700 - Long-term notes & loans payable	$1,210.93	$4,828.22	($3,617.29)	-74.92%
Total Long Term Liabilities	$1,210.93	$4,828.22	($3,617.29)	-74.92%
Equity	$18,048,766.02	$20,893,815.57	($2,845,049.55)	-13.62%
Total Liabilities & Equity	$19,365,542.36	$22,263,744.23	($2,898,201.87)	-13.02%

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

FINANCIAL ROW	AMOUNT (JAN 2024 - DEC 2024)	COMPARATIVE AMOUNT (JAN 2023 - ADJUST 2023)	VARIANCE	% VARIANCE
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	$66,066.44	$42,867.82	$23,198.62	54.12%
4100 - Inkind Revenue	$1,456,087.30	$1,268,433.18	$187,654.12	14.79%
4200 - Miscellaneous Revenue	$1,080,031.38	$3,707,973.17	($2,627,941.79)	-70.87%
4400 - State Revenue	$1,692,634.18	$1,306,592.16	$386,042.02	29.55%
4500 - Federal Revenue	$14,836,297.94	$15,335,877.40	($499,579.46)	-3.26%
4900 - Recoveries from Programs	$3,993,852.84	$3,631,342.57	$362,510.27	9.98%
5000 - Rental Revenue	$757,609.79	$657,610.55	$99,999.24	15.21%
5100 - Program Fee Revenue	$1,503,288.38	$1,723,429.39	($220,141.01)	-12.77%
5300 - Interest and Dividends	$319,186.88	$178,520.67	$140,666.21	78.80%
5400 - Revenue from other sources	$880,858.99	$1,736,410.96	($855,551.97)	-49.27%
5800 - Special Event Expense	$5,266.00	$8,795.33	($3,529.33)	-40.13%
Total - Income	$26,591,180.12	$29,597,853.20	($3,006,673.08)	-10.16%
Cost Of Sales				
8000 - Cost of Goods Sold	$2,810.86	$169.31	$2,641.55	1,560.19%
Total - Cost Of Sales	$2,810.86	$169.31	$2,641.55	1,560.19%
Gross Profit	$26,588,369.26	$29,597,683.89	($3,009,314.63)	-10.17%
Expense				
7000 - Grants, contracts, & direct assistance	$1,022,018.36	$1,922,010.30	($899,991.94)	-46.83%
7200 - Salaries & related expenses	$12,510,993.05	$11,604,663.35	$906,329.70	7.81%
7300 - Indirect Cost Pool Expense	$2,176,494.79	$1,917,677.75	$258,817.04	13.50%
7500 - Contract/Consultant Services	$1,969,513.57	$1,695,750.90	$273,762.67	16.14%
8100 - Non personnel expenses	$1,200,651.88	$1,174,591.55	$26,060.33	2.22%
8200 - Facility & equipment expenses	$2,729,683.78	$2,236,740.58	$492,943.20	22.04%
8300 - Travel & meetings expenses	$639,723.41	$635,710.63	$4,012.78	0.63%
8400 - Insurance Expense	$2,235,204.58	$2,043,164.06	$192,040.52	9.40%
8600 - Business expenses	$1,704.01	$8,063.62	($6,359.61)	-78.87%
8700 - Food Expenses	$1,628,051.09	$1,609,006.95	$19,044.14	1.18%
8800 - In-Kind Expenses	$1,456,087.30	$1,268,433.18	$187,654.12	14.79%
Total - Expense	$27,570,125.82	$26,115,812.87	$1,454,312.95	5.57%
Net Ordinary Income	($981,756.56)	$3,481,871.02	($4,463,627.58)	-128.20%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	$1,840,623.38	$1,661,896.44	$178,726.94	10.75%
Total - Other Expense	$1,840,623.38	$1,661,896.44	$178,726.94	10.75%
Net Other Income	($1,840,623.38)	($1,661,896.44)	($178,726.94)	10.75%
Net Income	($2,822,379.94)	$1,819,974.58	($4,642,354.52)	-255.08%

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

FINANCIAL ROW	AMOUNT
ASSETS	
Current Assets	
Bank	
1000 - Cash	
1010 - Checking Account	$8,619,509.95
1020 - Payroll Account	$9,316.68
1021 - First United Accounts Payable	($15,280.36)
1022 - First United TH Reserve	$146,854.26
1023 - First United General Escrow	$178,390.15
1024 - First United Marina License	$253.87
1025 - First United Deposit (PayPal)	$2,115.20
1028 - First United Unrestricted Funds CD	$849,505.41
1030 - Shamrock Bank - Clayton	$1,854.10
1040 - Petty Cash	$835.00
1050 - McCurtain County National Bank	$6,449.31
1070 - Fund to Fund Allocation Transfers	($0.03)
Total - 1000 - Cash	**$9,799,803.54**
Total Bank	**$9,799,803.54**
Accounts Receivable	
1100 - Receivables	**$247,913.36**
1300 - Other receivables	
1320 - Notes/loans receivable	$334,632.06
1321 - Loans Receivable from Belmont	$217,351.48
1322 - Loans Receivable from Clayton	$227,561.53
1323 - Loans Receivable rom Kiamichi	$123,563.90
1324 - Loans Receivable from SOCDC	$522,001.57
1326 - Loans Receivable from Rouleau House	$51,909.76
Total - 1300 - Other receivables	**$1,477,020.30**
Total Accounts Receivable	**$1,724,933.66**
Other Current Asset	
1400 - Other assets	**$35,943.42**
1500 - Investments	**$375,985.60**
NS097 - Interfund Due to /Due from	($0.01)
Payroll Float	$303,788.87
Total Other Current Asset	**$715,717.88**
Total Current Assets	**$12,240,455.08**
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	**$19,365,542.36**
Liabilities & Equity	
Current Liabilities	
Accounts Payable	
2000 - Payables	**($19,631.34)**
Total Accounts Payable	**($19,631.34)**
Other Current Liability	
2100 - Accrued liabilities	**$1,304,858.50**
2400 - Refundable Advances	**$30,338.25**
Total Other Current Liability	**$1,335,196.75**
Total Current Liabilities	**$1,315,565.41**
Long Term Liabilities	
2700 - Long-term notes & loans payable	
2770 - Long-term liabilities - Mower Loan	$482.99
2780 - Lease liability	$727.94

FINANCIAL ROW	AMOUNT
Total - 2700 - Long-term notes & loans payable	$1,210.93
Total Long Term Liabilities	$1,210.93
Equity	$18,048,766.02
Total Liabilities & Equity	$19,365,542.36

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

FINANCIAL ROW	- UNASSIGNED - Amount	CAPITAL Amount	FUNDRAISING Amount	MANAGEMENT & GENERAL (ADMIN) Amount	OTHER Amount	PROGRAM SERVICES Amount	*TOTAL Amount*
Operating Activities							
Net Income	($2,628,963.41)	($525.89)	$793.89	($65,875.98)	$475.16	($128,283.71)	($2,822,379.94)
Adjustments to Net Income							
Accounts Receivable	$1,614,176.31	($136.33)	$0.00	$212,379.77	($182.72)	($155,929.61)	$1,670,307.42
Other Current Asset	$6,429,572.43	$0.00	$0.00	($775,529.86)	$0.00	($5,967,146.70)	($313,104.13)
Accounts Payable	($31,101.85)	$0.00	($31.12)	$9,488.43	$0.00	$21,549.43	($95.11)
Sales Tax Payable	$14,048.99	$0.00	$0.00	$0.00	$0.00	($14,060.24)	($11.25)
Other Current Liabilities	$7,604,706.16	$0.00	$0.00	($788,946.98)	$0.00	($6,865,187.85)	($49,428.67)
Total Adjustments to Net Income	**$15,631,402.04**	**($136.33)**	**($31.12)**	**($1,342,608.64)**	**($182.72)**	**($12,980,774.97)**	**$1,307,668.26**
Total Operating Activities	**$13,002,438.63**	**($662.22)**	**$762.77**	**($1,408,484.62)**	**$292.44**	**($13,109,058.68)**	**($1,514,711.68)**
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	($3,588.29)	$0.00	$0.00	$0.00	$0.00	($29.00)	($3,617.29)
Other Equity	($22,659.71)	$0.00	$0.00	($585,592.75)	$0.00	$585,582.85	($22,669.61)
Total Financing Activities	**($26,248.00)**	**$0.00**	**$0.00**	**($585,592.75)**	**$0.00**	**$585,553.85**	**($26,286.90)**
Net Change in Cash for Period	**$12,976,190.63**	**($662.22)**	**$762.77**	**($1,994,077.37)**	**$292.44**	**($12,523,491.84)**	**($1,540,985.59)**
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	**$34,678,118.64**	**$2,070.67**	**$1,726.99**	**($10,918,207.99)**	**$573.69**	**($13,964,009.21)**	**$9,800,272.79**

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

FINANCIAL ROW	AMOUNT
Operating Activities	
Net Income	($2,822,379.94)
Adjustments to Net Income	
Accounts Receivable	$1,670,307.42
Other Current Asset	($313,104.13)
Accounts Payable	($95.11)
Sales Tax Payable	($11.25)
Other Current Liabilities	($49,428.67)
Total Adjustments to Net Income	$1,307,668.26
Total Operating Activities	($1,514,711.68)
Investing Activities	
Other Asset	$12.99
Total Investing Activities	$12.99
Financing Activities	
Long Term Liabilities	($3,617.29)
Other Equity	($22,669.61)
Total Financing Activities	($26,286.90)
Net Change in Cash for Period	($1,540,985.59)
Cash at Beginning of Period	$11,341,258.38
Cash at End of Period	$9,800,272.79

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

FINANCIAL ROW	AMOUNT
Operating Activities	
Net Income	($2,822,379.94)
Adjustments to Net Income	
Accounts Receivable	$1,670,307.42
Other Current Asset	($313,104.13)
Accounts Payable	($95.11)
Sales Tax Payable	($11.25)
Other Current Liabilities	($49,428.67)
Total Adjustments to Net Income	$1,307,668.26
Total Operating Activities	($1,514,711.68)
Investing Activities	
Other Asset	$12.99
Total Investing Activities	$12.99
Financing Activities	
Long Term Liabilities	($3,617.29)
Other Equity	($22,669.61)
Total Financing Activities	($26,286.90)
Net Change in Cash for Period	($1,540,985.59)
Cash at Beginning of Period	$11,341,258.38
Cash at End of Period	$9,800,272.79

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

Agency Wide

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	$71,367.00	$66,066.44	$5,300.56	92.57%
4100 - Inkind Revenue	$2,195,125.11	$1,456,087.30	$739,037.81	66.33%
4200 - Miscellaneous Revenue	$12,660.00	$1,080,031.38	($1,067,371.38)	8,531.05%
4400 - State Revenue	$2,825,898.79	$1,692,634.18	$1,133,264.61	59.90%
4500 - Federal Revenue	$20,212,980.23	$14,836,297.94	$5,376,682.29	73.40%
4900 - Recoveries from Programs	$2,012,486.97	$3,993,852.84	($1,981,365.87)	198.45%
5000 - Rental Revenue	$0.00	$757,609.79	($757,609.79)	0.00%
5100 - Program Fee Revenue	$115,000.00	$1,503,288.38	($1,388,288.38)	1,307.21%
5300 - Interest and Dividends	$0.00	$319,186.88	($319,186.88)	0.00%
5400 - Revenue from other sources	$0.00	$880,858.99	($880,858.99)	0.00%
5800 - Special Event Expense	$0.00	$5,266.00	($5,266.00)	0.00%
Total - Income	$27,445,518.10	$26,591,180.12	$854,337.98	96.89%
Cost Of Sales				
8000 - Cost of Goods Sold	$0.00	$2,810.86	($2,810.86)	0.00%
Total - Cost Of Sales	$0.00	$2,810.86	($2,810.86)	0.00%
Gross Profit	$27,445,518.10	$26,588,369.26	$857,148.84	96.88%
Expense				
7000 - Grants, contracts, & direct assistance	$115,321.25	$1,022,018.36	($906,697.11)	886.24%
7200 - Salaries & related expenses	$14,004,835.34	$12,510,993.05	$1,493,842.29	89.33%
7300 - Indirect Cost Pool Expense	$2,451,840.61	$2,176,494.79	$275,345.82	88.77%
7500 - Contract/Consultant Services	$1,682,569.47	$1,969,513.57	($286,944.10)	117.05%
8100 - Non personnel expenses	$1,224,431.51	$1,200,651.88	$23,779.63	98.06%
8200 - Facility & equipment expenses	$1,347,981.71	$2,729,683.78	($1,381,702.07)	202.50%
8300 - Travel & meetings expenses	$1,223,387.89	$639,723.41	$583,664.48	52.29%
8400 - Insurance Expense	$171,915.40	$2,235,204.58	($2,063,289.18)	1,300.18%
8600 - Business expenses	$0.00	$1,704.01	($1,704.01)	0.00%
8700 - Food Expenses	$629,281.20	$1,628,051.09	($998,769.89)	258.72%
8800 - In-Kind Expenses	$1,838,802.54	$1,456,087.30	$382,715.24	79.19%
Total - Expense	$24,690,366.92	$27,570,125.82	($2,879,758.90)	111.66%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	$2,582,634.57	$1,840,623.38	$742,011.19	71.27%
Total - Other Expense	$2,582,634.57	$1,840,623.38	$742,011.19	71.27%
Net Income	$172,516.61	($2,822,379.94)	$2,994,896.55	-1,636.00%

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 | Admin

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	$36,516.80	($36,516.80)	0.00%
4400 - State Revenue	$0.00	$282,091.92	($282,091.92)	0.00%
4900 - Recoveries from Programs	$2,012,486.97	$3,993,852.84	($1,981,365.87)	198.45%
5000 - Rental Revenue	$0.00	$306,992.96	($306,992.96)	0.00%
5100 - Program Fee Revenue	$0.00	$605.59	($605.59)	0.00%
5300 - Interest and Dividends	$0.00	$81,540.87	($81,540.87)	0.00%
5400 - Revenue from other sources	$0.00	$638,337.40	($638,337.40)	0.00%
5800 - Special Event Expense	$0.00	$40.00	($40.00)	0.00%
Total - Income	$2,012,486.97	$5,343,661.80	($3,331,174.83)	265.53%
Gross Profit	$2,012,486.97	$5,343,661.80	($3,331,174.83)	265.53%
Expense				
7000 - Grants, contracts, & direct assistance	$0.00	$10,000.00	($10,000.00)	0.00%
7200 - Salaries & related expenses	$1,480,512.38	$1,433,385.43	$47,126.95	96.82%
7300 - Indirect Cost Pool Expense	$0.00	$58,809.34	($58,809.34)	0.00%
7500 - Contract/Consultant Services	$115,215.21	$217,036.99	($101,821.78)	188.38%
8100 - Non personnel expenses	$54,841.35	$210,587.77	($155,746.42)	383.99%
8200 - Facility & equipment expenses	$40,902.28	$318,314.77	($277,412.49)	778.23%
8300 - Travel & meetings expenses	$82,133.76	$70,589.20	$11,544.56	85.94%
8400 - Insurance Expense	$34,962.98	$1,707,372.24	($1,672,409.26)	4,883.37%
8600 - Business expenses	$0.00	$911.00	($911.00)	0.00%
8700 - Food Expenses	$0.00	$20,319.16	($20,319.16)	0.00%
Total - Expense	$1,808,567.96	$4,047,325.90	($2,238,757.94)	223.79%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	$153,301.25	$383,314.85	($230,013.60)	250.04%
Total - Other Expense	$153,301.25	$383,314.85	($230,013.60)	250.04%
Net Income	$50,617.76	$913,021.05	($862,403.29)	1,803.76%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2024 to Dec 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	$3,683.42	$0.00	$3,683.42
4100 - Inkind Revenue	$0.00	$0.00	$0.00	$0.00	$0.00
4200 - Miscellaneous Revenue	($117.14)	$0.00	$36,516.80	$0.00	$36,516.80
4400 - State Revenue	$0.00	$0.00	$282,091.92	$0.00	$282,091.92
4500 - Federal Revenue	$0.00	$0.00	$0.00	$0.00	$0.00
4900 - Recoveries from Programs	$0.00	$0.00	$3,993,852.84	$0.00	$3,993,852.84
5000 - Rental Revenue	$0.00	$0.00	$0.00	$306,992.96	$306,992.96
5100 - Program Fee Revenue	$10,529.64	$0.00	$0.00	$605.59	$605.59
5300 - Interest and Dividends	$0.00	($193.26)	$80,727.39	$1,006.74	$81,540.87
5400 - Revenue from other sources	($68,151.47)	($89,669.01)	$649,669.01	$78,337.40	$638,337.40
5800 - Special Event Expense	$40.00	$0.00	$40.00	$0.00	$40.00
Total - Income	($57,698.97)	($89,862.27)	$5,046,581.38	$386,942.69	$5,343,661.80
8000 - Cost of Goods Sold					
8010 - Resale Fuel Expense	$0.00	$0.00	$0.00	$0.00	$0.00
8020 - Ship Store (Resale Inv)	$400.53	$0.00	$0.00	$0.00	$0.00
Total - 8000 - Cost of Goods Sold	$400.53	$0.00	$0.00	$0.00	$0.00
Expense					
7000 - Grants, contracts, & direct assistance	$600.00	$0.00	$10,000.00	$0.00	$10,000.00
7200 - Salaries & related expenses	$978,120.24	$0.00	$1,433,385.43	$0.00	$1,433,385.43
7300 - Indirect Cost Pool Expense	$117,076.45	$0.00	$58,809.34	$0.00	$58,809.34
7500 - Contract/Consultant Services	$78,815.37	$0.00	$147,667.10	$69,369.89	$217,036.99
8100 - Non personnel expenses	$46,204.68	$0.00	$189,509.61	$21,078.16	$210,587.77
8200 - Facility & equipment expenses	$135,154.60	$0.00	$164,511.13	$153,803.64	$318,314.77
8300 - Travel & meetings expenses	$2,460.61	$0.00	$69,825.94	$763.26	$70,589.20
8400 - Insurance Expense	$1,880.05	$0.00	$1,658,107.24	$49,265.00	$1,707,372.24
8600 - Business expenses	$0.00	$0.00	$0.00	$911.00	$911.00
8700 - Food Expenses	$569,662.60	$121.21	$20,197.95	$0.00	$20,319.16
8800 - In-Kind Expenses	$0.00	$0.00	$0.00	$0.00	$0.00
Total - Expense	$1,929,974.60	$121.21	$3,752,013.74	$295,190.95	$4,047,325.90
Net Ordinary Income	($1,988,074.10)	($89,983.48)	$1,294,567.64	$91,751.74	$1,296,335.90
Other Income and Expenses					
Other Expense					
8500 - Other Expense	$6,166.32	$0.00	$374,504.23	$8,810.62	$383,314.85
Total - Other Expense	$6,166.32	$0.00	$374,504.23	$8,810.62	$383,314.85

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 - Inkind Revenue	**$1,419,979.57**	**$1,060,613.55**	**$359,366.02**	**74.69%**
4200 - Miscellaneous Revenue	**$0.00**	**$904,720.64**	**($904,720.64)**	**0.00%**
4400 - State Revenue	**$200,783.05**	**$245,702.12**	**($44,919.07)**	**122.37%**
4500 - Federal Revenue	**$8,109,325.49**	**$8,053,590.86**	**$55,734.63**	**99.31%**
5100 - Program Fee Revenue	**$0.00**	**$591,634.10**	**($591,634.10)**	**0.00%**
5300 - Interest and Dividends	**$0.00**	**$25,292.18**	**($25,292.18)**	**0.00%**
5400 - Revenue from other sources	**$0.00**	**$35,562.07**	**($35,562.07)**	**0.00%**
Total - Income	**$9,774,335.11**	**$10,951,862.52**	**($1,177,527.41)**	**112.05%**
Gross Profit	**$9,774,335.11**	**$10,951,862.52**	**($1,177,527.41)**	**112.05%**
Expense				
7000 - Grants, contracts, & direct assistance	**$0.00**	**($32,589.40)**	**$32,589.40**	**0.00%**
7200 - Salaries & related expenses	**$4,994,646.96**	**$5,363,630.94**	**($368,983.98)**	**107.39%**
7300 - Indirect Cost Pool Expense	**$952,685.48**	**$1,043,394.95**	**($90,709.47)**	**109.52%**
7500 - Contract/Consultant Services	**$1,110,976.00**	**$1,240,540.29**	**($129,564.29)**	**111.66%**
8100 - Non personnel expenses	**$177,217.21**	**$514,931.40**	**($337,714.19)**	**290.57%**
8200 - Facility & equipment expenses	**$170,321.00**	**$435,308.12**	**($264,987.12)**	**255.58%**
8300 - Travel & meetings expenses	**$144,912.00**	**$112,198.26**	**$32,713.74**	**77.43%**
8400 - Insurance Expense	$43,000.00	$128,714.72	($85,714.72)	299.34%
8600 - Business expenses	**$0.00**	**$380.92**	**($380.92)**	**0.00%**
8700 - Food Expenses	**$567,781.20**	**$1,023,862.68**	**($456,081.48)**	**180.33%**
8800 - In-Kind Expenses	**$1,063,657.00**	**$1,060,613.55**	**$3,043.45**	**99.71%**
Total - Expense	**$9,225,196.85**	**$10,890,986.43**	**($1,665,789.58)**	**118.06%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense	**$386,647.00**	**$540,910.20**	**($154,263.20)**	**139.90%**
Total - Other Expense	**$386,647.00**	**$540,910.20**	**($154,263.20)**	**139.90%**
Net Income	**$162,491.26**	**($480,034.11)**	**$642,525.37**	**-295.42%**

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

Financial Row	20 Early Childhood							
	CACFP - Daycare Homes	Early Head Start - CC	Early Learning Centers		HS/EHS			Total
					EHS	Head Start	Total	
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Ordinary Income/Expense								
Income								
4000 - Contribution Revenue	$0.00	$0.00	$0.00	$500.00	$0.00	$34,247.00	$34,747.00	$34,747.00
4100 - Inkind Revenue	$0.00	$4,327.48	$9,739.30	$0.00	$43,196.50	$1,003,350.27	$1,046,546.77	$1,060,613.55
4200 - Miscellaneous Revenue	$0.00	$0.00	$464,684.46	$188,074.90	$0.00	$251,961.28	$440,036.18	$904,720.64
4400 - State Revenue	$0.00	$0.00	$0.00	$0.00	$72,182.12	$173,520.00	$245,702.12	$245,702.12
4500 - Federal Revenue	$1,087,247.53	$2,140,707.66	$69,007.00	$0.00	$0.00	$4,756,628.67	$4,756,628.67	$8,053,590.86
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	$591,466.10	$0.00	$0.00	$0.00	$0.00	$591,634.10
5300 - Interest and Dividends	$0.00	$0.00	$9,663.71	$15,529.94	$0.00	$98.53	$15,628.47	$25,292.18
5400 - Revenue from other sources	$1,451.05	$0.00	$34,111.02	$0.00	$0.00	$0.00	$0.00	$35,562.07
5800 - Special Event Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - Income	$1,088,698.58	$2,145,035.14	$1,178,671.59	$204,104.84	$115,378.62	$6,219,805.75	$6,539,289.21	$10,951,694.52
8000 - Cost of Goods Sold								
8010 - Resale Fuel Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8020 - Ship Store (Resale Inv)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Expense								
7000 - Grants, contracts, & direct assistance	($66,700.42)	$0.00	$34,111.02	$0.00	$0.00	$0.00	$0.00	($32,589.40)
7200 - Salaries & related expenses	$104,290.21	$730,211.33	$718,229.52	$212,700.11	$758,251.75	$2,675,196.13	$3,646,147.99	$5,363,630.94
7300 - Indirect Cost Pool Expense	$20,433.25	$142,844.37	$124,272.93	$229,435.93	$153,286.47	$341,479.08	$724,201.48	$1,043,394.95
7500 - Contract/Consultant Services	$5,737.50	$870,322.57	$3,111.99	$308,815.42	$0.00	$52,552.81	$361,368.23	$1,240,540.29
8100 - Non personnel expenses	$4,718.98	$137,896.03	$38,379.54	$52,756.47	$241.69	$277,255.83	$330,253.99	$514,931.40
8200 - Facility & equipment expenses	$4,488.00	$85,806.71	$16,573.84	$150,835.67	$1,190.87	$176,260.53	$328,287.07	$435,308.12
8300 - Travel & meetings expenses	$28,360.44	$16,026.28	$5,315.13	$1,759.23	$1,852.74	$58,816.32	$62,428.29	$112,198.26
8400 - Insurance Expense	$0.00	$15,821.80	$24,527.80	$4.00	$0.00	$88,361.12	$88,365.12	$128,714.72
8600 - Business expenses	$0.00	$0.00	$0.00	$380.92	$0.00	$0.00	$380.92	$380.92
8700 - Food Expenses	$430,801.93	$55.98	$108,529.35	$58,160.49	$0.00	$426,041.57	$484,202.06	$1,023,862.68
8800 - In-Kind Expenses	$0.00	$4,327.48	$9,739.30	$0.00	$43,196.50	$1,003,350.27	$1,046,546.77	$1,060,613.55
Total - Expense	$532,129.89	$2,003,312.55	$1,082,790.42	$1,014,848.24	$958,020.02	$5,099,313.66	$7,072,181.92	$10,690,414.78
Net Ordinary Income	$556,568.69	$141,722.59	$95,881.17	($810,743.40)	($842,641.40)	$1,120,492.09	($532,892.71)	$261,279.74
Other Income and Expenses								
Other Expense								
8500 - Other Expense	$59.70	$347,250.51	$5,695.62	$34,832.93	$1,561.48	$151,509.96	$187,904.37	$540,910.20
Total - Other Expense	$59.70	$347,250.51	$5,695.62	$34,832.93	$1,561.48	$151,509.96	$187,904.37	$540,910.20

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	$27,617.02	($497.02)	101.83%
4100 - Inkind Revenue	$587,645.54	$395,473.75	$192,171.79	67.30%
4200 - Miscellaneous Revenue	$12,660.00	$13,774.65	($1,114.65)	108.80%
4400 - State Revenue	$2,612,955.74	$895,466.46	$1,717,489.28	34.27%
4500 - Federal Revenue	$6,394,799.68	$2,542,428.60	$3,852,371.08	39.76%
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	$4,400.00	($4,400.00)	0.00%
Total - Income	$9,635,180.96	$3,935,208.75	$5,699,972.21	40.84%
Gross Profit	$9,635,180.96	$3,935,208.75	$5,699,972.21	40.84%
Expense				
7000 - Grants, contracts, & direct assistance	$115,321.25	$96,014.18	$19,307.07	83.26%
7200 - Salaries & related expenses	$4,696,970.57	$1,847,954.15	$2,849,016.42	39.34%
7300 - Indirect Cost Pool Expense	$883,455.73	$367,839.64	$515,616.09	41.64%
7500 - Contract/Consultant Services	$240,509.00	$159,762.84	$80,746.16	66.43%
8100 - Non personnel expenses	$610,864.61	$199,014.81	$411,849.80	32.58%
8200 - Facility & equipment expenses	$312,288.71	$165,476.99	$146,811.72	52.99%
8300 - Travel & meetings expenses	$311,829.43	$133,555.95	$178,273.48	42.83%
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	$13,406.81	$48,093.19	21.80%
8800 - In-Kind Expenses	$587,645.54	$395,473.75	$192,171.79	67.30%
Total - Expense	$7,820,434.84	$3,384,553.94	$4,435,880.90	43.28%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	$1,552,202.73	$469,999.76	$1,082,202.97	30.28%
Total - Other Expense	$1,552,202.73	$469,999.76	$1,082,202.97	30.28%
Net Income	$262,543.39	$80,655.05	$181,888.34	30.72%

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

Financial Row	30 Community Service																		
		Community Services	Drug Free Communities	Emergency Services			Healthy Start	Mentoring	RCOR TRI-CORP	RSVP	RX	Second Chance	Victim Services				WORK READY OK	Youth Build	Total
	Amount	Amount	Amount	Amount	EFSP Amount	Total Amount	Amount	Amount	Amount	Amount	Amount	Amount	CASA Amount	Safe Place Healing Hearts Amount	VOCA Amount	Total Amount	Amount	Amount	Amount
Ordinary Income/Expense																			
Income																			
4000 - Contribution Revenue	$0.00	$100.00	$0.00	$0.00	$0.00	$0.00	$0.00	$95.00	$0.00	$8,945.00	$0.00	$0.00	$3,100.00	$0.00	$0.00	$3,100.00	$0.00	$15,377.02	$27,617.02
4100 - Inkind Revenue	$0.00	$0.00	$114,825.20	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$27,149.43	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$253,499.12	$395,473.75
4200 - Miscellaneous Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$2,500.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,274.65	$0.00	$0.00	$1,274.65	$0.00	$10,000.00	$13,774.65
4400 - State Revenue	$444,662.23	$99,116.06	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$3,105.46	$0.00	$9,201.83	$0.00	$421.31	$9,623.14	$338,959.57	$0.00	$895,466.46
4500 - Federal Revenue	$0.00	$101,294.30	$57,272.00	$0.00	$0.00	$0.00	$939,631.09	$36,327.96	$359,995.16	$40,306.10	$0.00	$175,373.61	$0.00	$215,014.11	$106,662.27	$321,676.38	$0.00	$510,552.00	$2,542,428.60
4900 - Recoveries from Programs	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5000 - Rental Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5100 - Program Fee Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5300 - Interest and Dividends	$33.17	$57.13	$59.41	$19.45	$0.00	$19.45	$16.14	$124.11	$23.42	$20.21	$0.00	$28.37	$213.43	$0.00	$612.22	$825.65	$0.00	$71.44	$1,278.50
5400 - Revenue from other sources	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$12,500.00	$9,643.52	$19,626.25	$0.00	$0.00	$13,000.00	$0.00	$0.00	$13,000.00	$0.00	$0.00	$54,769.77
5800 - Special Event Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,489.00	$0.00	$980.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,931.00	$4,400.00
Total - Income	$444,695.40	$200,567.49	$172,156.61	$19.45	$0.00	$19.45	$942,147.23	$49,047.07	$369,662.10	$97,535.99	$3,105.46	$176,381.98	$26,789.91	$215,014.11	$107,695.80	$349,499.82	$338,959.57	$791,430.58	$3,935,208.75
8000 - Cost of Goods Sold																			
8010 - Resale Fuel 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	$0.00	$0.00	$0.00	$0.00
8020 - Ship Store (Resale Inv)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Expense																			
7000 - Grants, contracts, & direct assistance	$0.00	$62,308.02	$9,643.52	$2,508.98	$2,756.40	$5,265.38	$0.00	$451.03	$0.00	$0.00	$0.00	$0.00	$456.52	$7,783.24	$7,166.62	$15,406.38	$0.00	$2,939.85	$96,014.18
7200 - Salaries & related expenses	$206,958.54	$47,410.85	$41,034.53	$0.00	$0.00	$0.00	$634,714.94	$29,437.38	$251,253.99	$52,291.60	$2,543.08	$115,677.20	$0.00	$91,926.66	$105,182.36	$197,109.02	$51,524.63	$217,998.39	$1,847,954.15
7300 - Indirect Cost Pool Expense	$41,032.29	$9,540.67	$8,007.18	$0.00	$0.00	$0.00	$125,920.68	$5,701.39	$49,284.78	$10,886.20	$513.47	$23,095.15	$1,209.86	$18,635.10	$19,393.81	$39,238.77	$10,176.02	$44,443.04	$367,839.64
7500 - Contract/Consultant Services	$2,735.00	$25,680.00	$0.00	$0.00	$0.00	$0.00	$96,250.33	$1,331.00	$2,599.00	$0.00	$0.00	$22,222.00	$2,344.50	$1,431.70	$0.00	$3,776.20	$4,463.63	$705.68	$159,762.84
8100 - Non personnel expenses	$71,834.36	$4,204.41	$86.76	$0.00	$0.00	$0.00	$28,956.82	$6,518.55	$18,746.50	$1,801.13	$0.00	$5,227.56	$1,548.85	$4,848.01	$1,622.81	$8,019.67	$24,825.33	$28,793.72	$199,014.81
8200 - Facility & equipment expenses	$49,687.88	$606.00	$0.00	$0.00	$0.00	$0.00	$35,322.00	$700.00	$10,406.98	$2,818.00	$0.00	$4,560.00	$2,049.00	$6,575.50	$3,435.48	$12,059.98	$25,982.42	$23,333.73	$165,476.99
8300 - Travel & meetings expenses	$4,669.89	$2,590.25	$94.77	$0.00	$0.00	$0.00	$26,611.61	$1,912.75	$16,837.06	$2,341.74	$48.91	$17,386.29	$2,831.91	$7,597.47	$3,012.09	$13,441.47	$5,692.97	$41,928.24	$133,555.95
8400 - Insurance Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$24.00	$0.00	$0.00	$1,494.32	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$4,529.00	$6,047.32
8600 - Business expenses	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$7.50	$7.50
8700 - Food Expenses	$3,139.24	$200.00	$255.57	$0.00	$0.00	$0.00	$3,870.87	$0.00	$578.36	$933.19	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$4,212.54	$217.04	$13,406.81
8800 - In-Kind Expenses	$0.00	$0.00	$114,825.20	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$27,149.43	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$253,499.12	$395,473.75
Total - Expense	$380,057.20	$152,540.20	$173,947.53	$2,508.98	$2,756.40	$5,265.38	$951,671.25	$46,052.10	$349,706.67	$99,715.61	$3,105.46	$188,168.20	$10,440.64	$138,797.68	$139,813.17	$289,051.49	$126,877.54	$618,395.31	$3,384,553.94
Net Ordinary Income	$64,638.20	$48,027.29	($1,790.92)	($2,489.53)	($2,756.40)	($5,245.93)	($9,524.02)	$2,994.97	$19,955.43	($2,179.62)	$0.00	($11,786.22)	$16,349.27	$76,216.43	($32,117.37)	$60,448.33	$212,082.03	$173,035.27	$550,654.81
Other Income and Expenses																			
Other Expense																			
8500 - Other Expense	$76,544.03	$24,145.87	$7,597.35	$0.00	$0.00	$0.00	$54,400.49	$863.90	$33,932.83	$8,218.94	$0.00	$3,404.99	$5,479.54	$2,279.11	$6,205.13	$13,963.78	$78,168.84	$168,758.74	$469,999.76
Total - Other Expense	$76,544.03	$24,145.87	$7,597.35	$0.00	$0.00	$0.00	$54,400.49	$863.90	$33,932.83	$8,218.94	$0.00	$3,404.99	$5,479.54	$2,279.11	$6,205.13	$13,963.78	$78,168.84	$168,758.74	$469,999.76

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	$123,269.70	($123,269.70)	0.00%
4400 - State Revenue	$12,160.00	$11,515.35	$644.65	94.70%
4500 - Federal Revenue	$5,271,794.06	$3,466,557.56	$1,805,236.50	65.76%
5000 - Rental Revenue	$0.00	$448,012.83	($448,012.83)	0.00%
5100 - Program Fee Revenue	$0.00	$120,075.58	($120,075.58)	0.00%
5300 - Interest and Dividends	$0.00	$186,403.26	($186,403.26)	0.00%
5400 - Revenue from other sources	$0.00	$359,382.59	($359,382.59)	0.00%
Total - Income	$5,471,454.06	$4,715,216.87	$756,237.19	86.18%
Gross Profit	$5,471,454.06	$4,715,216.87	$756,237.19	86.18%
Expense				
7000 - Grants, contracts, & direct assistance	$0.00	$1,089,546.34	($1,089,546.34)	0.00%
7200 - Salaries & related expenses	$2,045,172.43	$1,549,689.51	$495,482.92	75.77%
7300 - Indirect Cost Pool Expense	$440,398.40	$317,052.34	$123,346.06	71.99%
7500 - Contract/Consultant Services	$205,069.26	$191,061.96	$14,007.30	93.17%
8100 - Non personnel expenses	$327,308.34	$129,053.01	$198,255.33	39.43%
8200 - Facility & equipment expenses	$776,669.72	$1,049,461.33	($272,791.61)	135.12%
8300 - Travel & meetings expenses	$551,512.70	$129,035.56	$422,477.14	23.40%
8400 - Insurance Expense	$12,902.42	$189,165.17	($176,262.75)	1,466.12%
8600 - Business expenses	$0.00	$404.59	($404.59)	0.00%
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	$4,546,533.27	$4,645,135.59	($98,602.32)	102.17%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	$473,483.59	$279,196.72	$194,286.87	58.97%
Total - Other Expense	$473,483.59	$279,196.72	$194,286.87	58.97%
Net Income	$451,437.20	($209,115.44)	$660,552.64	-46.32%

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

Financial Row	40 Housing Department									
		Apartments	Construction	HUD Apartments (Lift)	Housing			Self Help Housing	TMA	Total
	Amount	Amount	Amount	Amount	Amount	Weatherization Amount	Total 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	$123,269.70	$0.00	$123,269.70	$0.00	$0.00	$123,269.70
4400 - State Revenue	$0.00	$0.00	$0.00	$0.00	$11,515.35	$0.00	$11,515.35	$0.00	$0.00	$11,515.35
4500 - Federal Revenue	$0.00	$0.00	$506,827.27	$0.00	$1,295,200.63	$0.00	$1,295,200.63	$442,801.52	$1,221,728.14	$3,466,557.56
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	$10,435.50	$437,577.33	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$448,012.83
5100 - Program Fee Revenue	$505.14	$3,316.76	$0.00	$29,437.81	$86,760.12	$0.00	$86,760.12	$55.75	$0.00	$120,075.58
5300 - Interest and Dividends	$154,437.00	$21,299.30	$0.00	$0.00	$10,666.96	$0.00	$10,666.96	$0.00	$0.00	$186,403.26
5400 - Revenue from other sources	$0.00	$14,780.66	$0.00	$0.00	$344,601.93	$0.00	$344,601.93	$0.00	$0.00	$359,382.59
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	$165,377.64	$476,974.05	$506,827.27	$29,437.81	$1,872,014.69	$0.00	$1,872,014.69	$442,857.27	$1,221,728.14	$4,715,216.87
8000 - Cost of Goods Sold										
8010 - Resale Fuel Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8020 - Ship Store (Resale Inv)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Expense										
7000 - Grants, contracts, & direct assistance	$167,037.00	$17,875.66	$0.00	$0.00	$344,633.68	$0.00	$344,633.68	$0.00	$560,000.00	$1,089,546.34
7200 - Salaries & related expenses	$81,818.38	$40,682.40	$660,241.50	$650.77	($53,434.99)	$40,209.27	($13,225.72)	$316,210.46	$463,311.72	$1,549,689.51
7300 - Indirect Cost Pool Expense	$16,792.67	$7,996.98	$130,188.58	$6,988.99	($9,116.71)	$8,282.14	($834.57)	$61,162.12	$94,757.57	$317,052.34
7500 - Contract/Consultant Services	$2,905.00	$33,516.03	$40,888.04	$0.00	$90,772.61	$0.00	$90,772.61	$682.79	$22,297.49	$191,061.96
8100 - Non personnel expenses	$4,418.86	$5,533.06	$62,591.25	$50.99	$28,056.60	$0.00	$28,056.60	$8,133.51	$20,268.74	$129,053.01
8200 - Facility & equipment expenses	$16,434.71	$205,323.49	$7,186.13	$1,046.17	$780,998.54	$0.00	$780,998.54	$18,262.29	$20,210.00	$1,049,461.33
8300 - Travel & meetings expenses	$51.25	$2,060.28	$15,656.85	$672.01	$4,167.65	$0.00	$4,167.65	$35,505.55	$70,921.97	$129,035.56
8400 - Insurance Expense	$0.00	$155,865.12	$0.00	$0.00	$33,138.05	$0.00	$33,138.05	$162.00	$0.00	$189,165.17
8600 - Business expenses	$0.00	$0.00	$0.00	$0.00	$404.59	$0.00	$404.59	$0.00	$0.00	$404.59
8700 - Food Expenses	$0.00	$0.00	$0.00	$0.00	$665.78	$0.00	$665.78	$0.00	$0.00	$665.78
8800 - In-Kind Expenses	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - Expense	$289,457.87	$468,853.02	$916,752.35	$9,408.93	$1,220,285.80	$48,491.41	$1,268,777.21	$440,118.72	$1,251,767.49	$4,645,135.59
Net Ordinary Income	($124,080.23)	$8,121.03	($409,925.08)	$20,028.88	$651,728.89	($48,491.41)	$603,237.48	$2,738.55	($30,039.35)	$70,081.28
Other Income and Expenses										
Other Expense										
8500 - Other Expense	$3,256.73	$18,921.56	$69,612.95	$4,483.35	$164,249.27	$0.00	$164,249.27	$478.68	$18,194.18	$279,196.72
Total - Other Expense	$3,256.73	$18,921.56	$69,612.95	$4,483.35	$164,249.27	$0.00	$164,249.27	$478.68	$18,194.18	$279,196.72

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

Transit

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**	**$698,720.92**	**($261,659.92)**	**159.87%**
5000 - Rental Revenue	**$0.00**	**$2,604.00**	**($2,604.00)**	**0.00%**
5100 - Program Fee Revenue	**$115,000.00**	**$366,101.22**	**($251,101.22)**	**318.35%**
5300 - Interest and Dividends	**$0.00**	**$927.57**	**($927.57)**	**0.00%**
5400 - Revenue from other sources	**$0.00**	**($141,552.76)**	**$141,552.76**	**0.00%**
Total - Income	**$552,061.00**	**$1,076,532.95**	**($524,471.95)**	**195.00%**
Gross Profit	**$552,061.00**	**$1,076,532.95**	**($524,471.95)**	**195.00%**
Expense				
7000 - Grants, contracts, & direct assistance	**$0.00**	**($141,552.76)**	**$141,552.76**	**0.00%**
7200 - Salaries & related expenses	**$787,533.00**	**$1,033,199.51**	**($245,666.51)**	**131.19%**
7300 - Indirect Cost Pool Expense	**$175,301.00**	**$209,672.45**	**($34,371.45)**	**119.61%**
7500 - Contract/Consultant Services	**$10,800.00**	**$35,020.00**	**($24,220.00)**	**324.26%**
8100 - Non personnel expenses	**$54,200.00**	**$53,325.79**	**$874.21**	**98.39%**
8200 - Facility & equipment expenses	**$47,800.00**	**$300,468.93**	**($252,668.93)**	**628.60%**
8300 - Travel & meetings expenses	**$133,000.00**	**$180,418.32**	**($47,418.32)**	**135.65%**
8400 - Insurance Expense	$81,000.00	$115,060.81	($34,060.81)	142.05%
Total - Expense	**$1,289,634.00**	**$1,785,613.05**	**($495,979.05)**	**138.46%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense	**$17,000.00**	**$119,453.23**	**($102,453.23)**	**702.67%**
Total - Other Expense	**$17,000.00**	**$119,453.23**	**($102,453.23)**	**702.67%**
Net Income	**($754,573.00)**	**($828,533.33)**	**$73,960.33**	**109.80%**

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Income/Expense Statement Summary
From Jan 2024 to Dec 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	$149,732.00	$149,732.00
4500 - Federal Revenue	$0.00	$698,720.92	$698,720.92
4900 - Recoveries from Programs	$0.00	$0.00	$0.00
5000 - Rental Revenue	$0.00	$2,604.00	$2,604.00
5100 - Program Fee Revenue	$0.00	$366,101.22	$366,101.22
5300 - Interest and Dividends	$0.00	$927.57	$927.57
5400 - Revenue from other sources	$0.00	($141,552.76)	($141,552.76)
5800 - Special Event Expense	$0.00	$0.00	$0.00
Total - Income	$0.00	$1,076,532.95	$1,076,532.95
8000 - Cost of Goods Sold			
8010 - Resale Fuel Expense	$0.00	$0.00	$0.00
8020 - Ship Store (Resale Inv)	$0.00	$0.00	$0.00
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$0.00
Expense			
7000 - Grants, contracts, & direct assistance	$0.00	($141,552.76)	($141,552.76)
7200 - Salaries & related expenses	$32,827.54	$1,000,371.97	$1,033,199.51
7300 - Indirect Cost Pool Expense	$6,573.95	$203,098.50	$209,672.45
7500 - Contract/Consultant Services	$0.00	$35,020.00	$35,020.00
8100 - Non personnel expenses	$5,358.26	$47,967.53	$53,325.79
8200 - Facility & equipment expenses	$0.00	$300,468.93	$300,468.93
8300 - Travel & meetings expenses	$0.00	$180,418.32	$180,418.32
8400 - Insurance Expense	$0.00	$115,060.81	$115,060.81
8600 - Business expenses	$0.00	$0.00	$0.00
8700 - Food Expenses	$0.00	$0.00	$0.00
8800 - In-Kind Expenses	$0.00	$0.00	$0.00
Total - Expense	$44,759.75	$1,740,853.30	$1,785,613.05
Net Ordinary Income	($44,759.75)	($664,320.35)	($709,080.10)
Other Income and Expenses			
Other Expense			
8500 - Other Expense	$0.00	$119,453.23	$119,453.23
Total - Other Expense	$0.00	$119,453.23	$119,453.23

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	$1,866.73	($1,866.73)	0.00%
4400 - State Revenue	$0.00	$108,126.33	($108,126.33)	0.00%
4500 - Federal Revenue	$0.00	$75,000.00	($75,000.00)	0.00%
5100 - Program Fee Revenue	$0.00	$414,342.25	($414,342.25)	0.00%
5300 - Interest and Dividends	$0.00	$23,744.50	($23,744.50)	0.00%
5400 - Revenue from other sources	$0.00	$2,511.39	($2,511.39)	0.00%
5800 - Special Event Expense	$0.00	$786.00	($786.00)	0.00%
Total - Income	$0.00	$626,396.20	($626,396.20)	0.00%
Cost Of Sales				
8000 - Cost of Goods Sold	$0.00	$2,410.33	($2,410.33)	0.00%
Total - Cost Of Sales	$0.00	$2,410.33	($2,410.33)	0.00%
Gross Profit	$0.00	$623,985.87	($623,985.87)	0.00%
Expense				
7200 - Salaries & related expenses	$0.00	$305,013.27	($305,013.27)	0.00%
7300 - Indirect Cost Pool Expense	$0.00	$62,649.62	($62,649.62)	0.00%
7500 - Contract/Consultant Services	$0.00	$47,276.12	($47,276.12)	0.00%
8100 - Non personnel expenses	$0.00	$47,534.42	($47,534.42)	0.00%
8200 - Facility & equipment expenses	$0.00	$325,499.04	($325,499.04)	0.00%
8300 - Travel & meetings expenses	$0.00	$11,465.51	($11,465.51)	0.00%
8400 - Insurance Expense	$0.00	$86,964.27	($86,964.27)	0.00%
8700 - Food Expenses	$0.00	$134.06	($134.06)	0.00%
Total - Expense	$0.00	$886,536.31	($886,536.31)	0.00%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	$0.00	$41,582.30	($41,582.30)	0.00%
Total - Other Expense	$0.00	$41,582.30	($41,582.30)	0.00%
Net Income	$0.00	($304,132.74)	$304,132.74	0.00%

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

Financial Row	Economic Development/Lending Amount	Clayton Lake Amount	Hugo Lake Amount	Raymond Gary Amount	Total Amount	Total Amount
Ordinary Income/Expense						
Income						
4000 - Contribution Revenue	$0.00	$19.00	$0.00	$0.00	$19.00	$19.00
4100 - Inkind Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
4200 - Miscellaneous Revenue	$0.00	$0.00	$1,060.00	$806.73	$1,866.73	$1,866.73
4400 - State Revenue	$0.00	$52,277.50	$0.00	$55,848.83	$108,126.33	$108,126.33
4500 - Federal Revenue	$75,000.00	$0.00	$0.00	$0.00	$0.00	$75,000.00
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	$8,931.54	$39,725.00	$278,348.89	$78,462.32	$405,410.71	$414,342.25
5300 - Interest and Dividends	$21,635.14	$0.00	$1,669.19	$440.17	$2,109.36	$23,744.50
5400 - Revenue from other sources	$0.00	$10.00	$2,239.14	$20.00	$2,511.39	$2,511.39
5800 - Special Event Expense	$0.00	$0.00	$786.00	$0.00	$786.00	$786.00
Total - Income	$105,566.68	$92,031.50	$284,103.22	$135,578.05	$511,712.77	$617,279.45
8000 - Cost of Goods Sold						
8010 - Resale Fuel Expense	$0.00	$0.00	$569.85	$0.00	$569.85	$569.85
8020 - Ship Store (Resale Inv)	$0.00	$0.00	$1,840.48	$0.00	$1,840.48	$1,840.48
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$2,410.33	$0.00	$2,410.33	$2,410.33
Expense						
7000 - Grants, contracts, & direct assistance	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
7200 - Salaries & related expenses	$0.00	$56,059.75	$177,577.85	$71,375.67	$305,013.27	$305,013.27
7300 - Indirect Cost Pool Expense	$0.00	$11,558.18	$36,424.87	$14,666.57	$62,649.62	$62,649.62
7500 - Contract/Consultant Services	$0.00	$0.00	$41,017.32	$6,258.80	$47,276.12	$47,276.12
8100 - Non personnel expenses	$1,807.33	$2,988.23	$37,225.25	$5,243.39	$45,456.87	$47,534.42
8200 - Facility & equipment expenses	$20,184.95	$18,639.57	$249,946.24	$36,468.92	$305,314.09	$325,499.04
8300 - Travel & meetings expenses	$0.00	$810.19	$7,619.13	$3,036.19	$11,465.51	$11,465.51
8400 - Insurance Expense	$0.00	$5,823.03	$73,627.21	$7,514.03	$86,964.27	$86,964.27
8600 - Business expenses	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8700 - Food Expenses	$0.00	$0.00	$134.06	$0.00	$134.06	$134.06
8800 - In-Kind Expenses	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - Expense	$21,992.28	$95,878.95	$623,571.93	$144,563.57	$864,014.45	$886,006.73
Net Ordinary Income	$83,574.40	($3,847.45)	($341,879.04)	($8,985.52)	($354,712.01)	($271,137.61)
Other Income and Expenses						
Other Expense						
8500 - Other Expense	$0.00	$4,318.96	$28,167.61	$9,095.73	$41,582.30	$41,582.30
Total - Other Expense	$0.00	$4,318.96	$28,167.61	$9,095.73	$41,582.30	$41,582.30

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

NAME	AMOUNT (GROSS)
CAPITAL ONE	$3,256.75
DAVISON FUELS & OIL, LLC	$8,233.52
Elan Travel Bank	$34,471.67
HOME DEPOT BRC/GECF	$3,360.25
TCM BANK NA	$4,700.10
WAL-MART COMMUNITY BRC	$4,784.36
Total	**$58,808.65**

LIFT Community Action Agency Inc

Parent - Lift : LIFT Community Action Agency Inc

Credit Card Report

Dec 2024

Program	Business expenses	Cost of Goods Sold	Facility & equipment expenses				Food Expenses					Grants, contr
	Taxes - other Amount	Ship Store (Resale Inv) Amount	Construction Rehab & Renovation Amount	APPLIANCES & EQUIPMENT - NOT CAPITALIZED Amount	t for Building/Equip Amount	WX Tools & Equipment Amount	Total Amount	Food Nutrition Cost Amount	Non -Food, Nutrition Cost Amount	Other Food Expense Amount	Total Amount	Direct Assistance - Other Amount
Administration					$183.07		$183.07			$5,144.71	$5,144.71	
Apartments							$0.00				$0.00	
CASA							$0.00				$0.00	$372.42
Early Head Start Child Care							$0.00				$0.00	
Early Learning Centers							$0.00	$230.24	$68.72	$207.45	$506.41	
Head Start	$380.92						$0.00			$686.19	$686.19	
Healthy Start							$0.00				$0.00	
Housing	$404.59		$1,034.60				$1,034.60				$0.00	
Mentoring							$0.00				$0.00	
RSVP							$0.00				$0.00	
Safe Place Healing Hearts							$0.00				$0.00	$482.99
Second Chance							$0.00				$0.00	
State Park Operations		$38.79		$737.31	$1,615.18		$2,352.49				$0.00	
TMA							$0.00				$0.00	
TRANSIT							$0.00				$0.00	
Tri-CORPS							$0.00				$0.00	
Weatherization						$1,950.75	$1,950.75				$0.00	
WRO							$0.00			$393.02	$393.02	
Youth Build							$0.00				$0.00	
Total	**$785.51**	**$38.79**	**$1,034.60**	**$737.31**	**$1,798.25**	**$1,950.75**	**$5,520.91**	**$230.24**	**$68.72**	**$6,431.37**	**$6,730.33**	**$855.41**

LIFT Community Act

Parent - Lift : LIFT C

Credit Card Repo

Dec 2024

Program	acts, & direct assistanc	Non personnel expenses										Other Expense		
	Direct Assistance - Utilities Amount	Total Amount	Events/Meeting Expense Amount	Office/Teaching Supplies Amount	Other/Maint Supplies Amount	Postage & shipping Amount	Special Events Amount	Telephone & Internet Amount	Total Amount	Advertising & Community Sponsorships Amount	Computer & Software Related Expenses Amount	Fees/Dues Amount	Fundraising Expense Amount	Incentive Expense Amount
Administration		$0.00			$63.56				$63.56		$737.33	$638.11		
Apartments		$0.00							$0.00					
CASA		$372.42							$0.00					
Early Head Start Child Care		$0.00		$1,050.95					$1,050.95					
Early Learning Centers		$0.00		$1,280.68					$1,280.68			$54.25		
Head Start		$0.00	$26.14	$1,936.89	$526.65				$2,489.68			$499.47		$257.08
Healthy Start		$0.00							$0.00		$1,800.00			
Housing		$0.00							$0.00			$25.00		
Mentoring		$0.00	$750.00						$750.00					
RSVP		$0.00							$0.00					
Safe Place Healing Hearts	$102.50	$585.49							$0.00					
Second Chance		$0.00							$0.00					
State Park Operations		$0.00			$325.32			$1,225.64	$1,550.96	$233.20	$0.00			
TMA		$0.00							$0.00		$95.94			
TRANSIT		$0.00							$0.00			$187.42		
Tri-CORPS		$0.00	$377.54						$377.54					
Weatherization		$0.00							$0.00					
WRO		$0.00		$10.89	$29.45	$56.08	$1,116.60	$8.00	$1,221.02	$636.95	$30.00	$4.25		
Youth Build		$0.00	$2,283.76		$16.25	$146.00			$2,446.01				$517.37	
Total	**$102.50**	**$957.91**	**$3,437.44**	**$4,279.41**	**$961.23**	**$202.08**	**$1,116.60**	**$1,233.64**	**$11,230.40**	**$870.15**	**$2,663.27**	**$1,408.50**	**$517.37**	**$257.08**

LIFT Community Act
Parent - Lift : LIFT C
Credit Card Repo
Dec 2024

Program				Other assets	Travel & meetings expenses				Total
	Recognition Amount	Training & TTA Amount	Total Amount	Prepaid Expenses Amount	Fuel Cost Amount	Out of Area Travel Amount	Vehicle Repair & Maint Amount	Total Amount	Amount
Administration	$2,616.74		$3,992.18	$3,975.00	$61.10			$61.10	$13,419.62
Apartments			$0.00		$134.54			$134.54	$134.54
CASA			$0.00					$0.00	$372.42
Early Head Start Child Care		$806.65	$806.65		$105.12	$51.53		$156.65	$2,014.25
Early Learning Centers		$501.00	$555.25					$0.00	$2,342.34
Head Start	$1,454.38	$1,897.11	$4,108.04		$238.23	$116.81		$355.04	$8,019.87
Healthy Start		$131.11	$1,931.11					$0.00	$1,931.11
Housing		$3,495.17	$3,520.17		$898.92	$266.80	$25.06	$1,190.78	$6,150.14
Mentoring			$0.00					$0.00	$750.00
RSVP	$400.00		$400.00					$0.00	$400.00
Safe Place Healing Hearts			$0.00					$0.00	$585.49
Second Chance			$0.00			$1,089.18		$1,089.18	$1,089.18
State Park Operations			$233.20		$266.50			$266.50	$4,441.94
TMA			$95.94					$0.00	$95.94
TRANSIT			$187.42		$6,136.44	$0.00		$6,136.44	$6,323.86
Tri-CORPS		$15.75	$15.75					$0.00	$393.29
Weatherization		$59.00	$59.00		$276.79			$276.79	$2,286.54
WRO			$671.20					$0.00	$2,285.24
Youth Build		$177.38	$694.75		$103.88	$2,526.24		$2,630.12	$5,770.88
Total	**$4,471.12**	**$7,083.17**	**$17,270.66**	**$3,975.00**	**$8,221.52**	**$4,050.56**	**$25.06**	**$12,297.14**	**$58,806.65**

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

MS 24-25

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	**$0.00**	**$7,790.98**	**($7,790.98)**	**0.00%**
4200 - Miscellaneous Revenue	**$0.00**	**$1,981.20**	**($1,981.20)**	**0.00%**
4500 - Federal Revenue	**$0.00**	**$110,373.00**	**($110,373.00)**	**0.00%**
Total - Income	**$0.00**	**$120,145.18**	**($120,145.18)**	**0.00%**
Gross Profit	**$0.00**	**$120,145.18**	**($120,145.18)**	**0.00%**
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	$0.00	$156,644.61	($156,644.61)	0.00%
7230 - Pension plan contributions	$0.00	$11,132.04	($11,132.04)	0.00%
7240 - Employee benefits - not pension	$0.00	$26,245.04	($26,245.04)	0.00%
7250 - Payroll taxes, etc.	$0.00	$12,658.15	($12,658.15)	0.00%
Total - 7200 - Salaries & related expenses	**$0.00**	**$206,679.84**	**($206,679.84)**	**0.00%**
7300 - Indirect Cost Pool Expense	**$0.00**	**$41,665.95**	**($41,665.95)**	**0.00%**
7500 - Contract/Consultant Services	**$0.00**	**$1,870.70**	**($1,870.70)**	**0.00%**
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	$0.00	$2,974.57	($2,974.57)	0.00%
8120 - Other/Maint Supplies	$0.00	$1,571.35	($1,571.35)	0.00%
8130 - Telephone & Internet	$0.00	$4,537.78	($4,537.78)	0.00%
8140 - Postage & shipping	$0.00	$8.68	($8.68)	0.00%
8170 - Printing & copying	$0.00	$168.22	($168.22)	0.00%
Total - 8100 - Non personnel expenses	**$0.00**	**$9,260.60**	**($9,260.60)**	**0.00%**
8200 - Facility & equipment expenses				
8210 - Space Lease	$0.00	$337.85	($337.85)	0.00%
8220 - Electric	$0.00	$1,251.81	($1,251.81)	0.00%
8225 - Water	$0.00	$367.37	($367.37)	0.00%
8230 - Trash	$0.00	$596.42	($596.42)	0.00%
8235 - Sewer	$0.00	$236.60	($236.60)	0.00%
8240 - Natural Gas	$0.00	$14.56	($14.56)	0.00%
8260 - Repair/Maint for Building/Equip	$0.00	$351.46	($351.46)	0.00%
Total - 8200 - Facility & equipment expenses	**$0.00**	**$3,156.07**	**($3,156.07)**	**0.00%**
8300 - Travel & meetings expenses				
8310 - Local Travel	$0.00	$1,521.57	($1,521.57)	0.00%
8330 - Fuel Cost	$0.00	$196.15	($196.15)	0.00%
8335 - Vehicle Repair & Maint	$0.00	$4.39	($4.39)	0.00%
8340 - Child Transportation Exp	$0.00	$651.00	($651.00)	0.00%
Total - 8300 - Travel & meetings expenses	**$0.00**	**$2,373.11**	**($2,373.11)**	**0.00%**
8700 - Food Expenses	**$0.00**	**$2,121.38**	**($2,121.38)**	**0.00%**
8800 - In-Kind Expenses	**$0.00**	**$7,790.98**	**($7,790.98)**	**0.00%**
Total - Expense	**$0.00**	**$274,918.63**	**($274,918.63)**	**0.00%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8520 - Recognition	$0.00	$615.68	($615.68)	0.00%
8530 - Fees/Dues	$0.00	$425.96	($425.96)	0.00%
8540 - Training & TTA	$0.00	$1,298.48	($1,298.48)	0.00%
8570 - Advertising & Community Sponsorships	$0.00	$331.41	($331.41)	0.00%
Total - 8500 - Other Expense	**$0.00**	**$2,671.53**	**($2,671.53)**	**0.00%**
Total - Other Expense	**$0.00**	**$2,671.53**	**($2,671.53)**	**0.00%**
Net Income	**$0.00**	**($157,444.98)**	**$157,444.98**	**0.00%**

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

EHS 2425

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	**$0.00**	**$3,012.81**	**($3,012.81)**	**0.00%**
4500 - Federal Revenue	**$0.00**	**$33,050.00**	**($33,050.00)**	**0.00%**
Total - Income	**$0.00**	**$36,062.81**	**($36,062.81)**	**0.00%**
Gross Profit	**$0.00**	**$36,062.81**	**($36,062.81)**	**0.00%**
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	$0.00	$41,411.14	($41,411.14)	0.00%
7230 - Pension plan contributions	$0.00	$2,087.21	($2,087.21)	0.00%
7240 - Employee benefits - not pension	$0.00	$7,261.38	($7,261.38)	0.00%
7250 - Payroll taxes, etc.	$0.00	$3,320.49	($3,320.49)	0.00%
Total - 7200 - Salaries & related expenses	**$0.00**	**$54,080.22**	**($54,080.22)**	**0.00%**
7300 - Indirect Cost Pool Expense	**$0.00**	**$10,869.36**	**($10,869.36)**	**0.00%**
7500 - Contract/Consultant Services	**$0.00**	**$435.23**	**($435.23)**	**0.00%**
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	$0.00	$1,092.33	($1,092.33)	0.00%
8120 - Other/Maint Supplies	$0.00	$336.88	($336.88)	0.00%
8130 - Telephone & Internet	$0.00	$492.86	($492.86)	0.00%
8140 - Postage & shipping	$0.00	$1.86	($1.86)	0.00%
8160 - Events/Meeting Expense	$0.00	$26.14	($26.14)	0.00%
8170 - Printing & copying	$0.00	$36.06	($36.06)	0.00%
Total - 8100 - Non personnel expenses	**$0.00**	**$1,986.13**	**($1,986.13)**	**0.00%**
8200 - Facility & equipment expenses				
8210 - Space Lease	$0.00	$22.05	($22.05)	0.00%
8220 - Electric	$0.00	$315.88	($315.88)	0.00%
8225 - Water	$0.00	$70.41	($70.41)	0.00%
8230 - Trash	$0.00	$161.16	($161.16)	0.00%
8235 - Sewer	$0.00	$46.06	($46.06)	0.00%
8240 - Natural Gas	$0.00	$7.74	($7.74)	0.00%
8260 - Repair/Maint for Building/Equip	$0.00	$95.69	($95.69)	0.00%
Total - 8200 - Facility & equipment expenses	**$0.00**	**$718.99**	**($718.99)**	**0.00%**
8300 - Travel & meetings expenses				
8310 - Local Travel	$0.00	$193.33	($193.33)	0.00%
8330 - Fuel Cost	$0.00	$42.08	($42.08)	0.00%
8335 - Vehicle Repair & Maint	$0.00	$0.94	($0.94)	0.00%
Total - 8300 - Travel & meetings expenses	**$0.00**	**$236.35**	**($236.35)**	**0.00%**
8700 - Food Expenses	**$0.00**	**$940.14**	**($940.14)**	**0.00%**
8800 - In-Kind Expenses	**$0.00**	**$3,012.81**	**($3,012.81)**	**0.00%**
Total - Expense	**$0.00**	**$72,279.23**	**($72,279.23)**	**0.00%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8520 - Recognition	$0.00	$163.54	($163.54)	0.00%
8530 - Fees/Dues	$0.00	$189.24	($189.24)	0.00%
8540 - Training & TTA	$0.00	$1,141.38	($1,141.38)	0.00%
8570 - Advertising & Community Sponsorships	$0.00	$71.06	($71.06)	0.00%
Total - 8500 - Other Expense	**$0.00**	**$1,565.22**	**($1,565.22)**	**0.00%**
Total - Other Expense	**$0.00**	**$1,565.22**	**($1,565.22)**	**0.00%**
Net Income	**$0.00**	**($37,781.64)**	**$37,781.64**	**0.00%**

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

EHSCC 24-25

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	**$103,115.00**	**$2,267.35**	**$100,847.65**	**2.20%**
4500 - Federal Revenue	**$2,267,831.00**	**$725,192.00**	**$1,542,639.00**	**31.98%**
Total - Income	**$2,370,946.00**	**$727,459.35**	**$1,643,486.65**	**30.68%**
Gross Profit	**$2,370,946.00**	**$727,459.35**	**$1,643,486.65**	**30.68%**
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	$487,412.00	$267,530.60	$219,881.40	54.89%
7230 - Pension plan contributions	$48,741.00	$24,112.42	$24,628.58	49.47%
7240 - Employee benefits - not pension	$65,279.00	$47,368.44	$17,910.56	72.56%
7250 - Payroll taxes, etc.	$41,674.00	$20,609.16	$21,064.84	49.45%
Total - 7200 - Salaries & related expenses	**$643,106.00**	**$359,620.62**	**$283,485.38**	**55.92%**
7300 - Indirect Cost Pool Expense	**$128,189.00**	**$70,412.35**	**$57,776.65**	**54.93%**
7500 - Contract/Consultant Services	**$1,054,076.00**	**$295,584.70**	**$758,491.30**	**28.04%**
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	$56,000.00	$18,583.89	$37,416.11	33.19%
8120 - Other/Maint Supplies	$0.00	$4,930.33	($4,930.33)	0.00%
8130 - Telephone & Internet	$9,000.00	$1,678.22	$7,321.78	18.65%
8140 - Postage & shipping	$1,000.00	$54.73	$945.27	5.47%
8150 - Medical/Dental Supplies	$2,000.00	$1,117.89	$882.11	55.89%
8170 - Printing & copying	$7,000.00	$1,126.77	$5,873.23	16.10%
8180 - Fatherhood	$2,000.00	$0.00	$2,000.00	0.00%
Total - 8100 - Non personnel expenses	**$77,000.00**	**$27,491.83**	**$49,508.17**	**35.70%**
8200 - Facility & equipment expenses				
8210 - Space Lease	$0.00	$275.50	($275.50)	0.00%
8220 - Electric	$4,400.00	$2,012.96	$2,387.04	45.75%
8225 - Water	$400.00	$232.46	$167.54	58.12%
8230 - Trash	$100.00	$243.79	($143.79)	243.79%
8235 - Sewer	$400.00	$182.04	$217.96	45.51%
8240 - Natural Gas	$100.00	$86.63	$13.37	86.63%
8260 - Repair/Maint for Building/Equip	$45,000.00	$15,008.70	$29,991.30	33.35%
Total - 8200 - Facility & equipment expenses	**$50,400.00**	**$18,042.08**	**$32,357.92**	**35.80%**
8300 - Travel & meetings expenses				
8310 - Local Travel	$7,500.00	$3,245.52	$4,254.48	43.27%
8320 - Out of Area Travel	$5,000.00	$851.88	$4,148.12	17.04%
8330 - Fuel Cost	$2,500.00	$869.14	$1,630.86	34.77%
8335 - Vehicle Repair & Maint	$2,500.00	$140.50	$2,359.50	5.62%
Total - 8300 - Travel & meetings expenses	**$17,500.00**	**$5,107.04**	**$12,392.96**	**29.18%**
8400 - Insurance Expense	$6,000.00	$0.00	$6,000.00	0.00%
8700 - Food Expenses	**$6,000.00**	**$41.76**	**$5,958.24**	**0.70%**
8800 - In-Kind Expenses	**$103,115.00**	**$2,267.35**	**$100,847.65**	**2.20%**
Total - Expense	**$2,085,386.00**	**$778,567.73**	**$1,306,818.27**	**37.33%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8520 - Recognition	$9,150.00	$38.48	$9,111.52	0.42%
8530 - Fees/Dues	$1,500.00	$335.07	$1,164.93	22.34%
8540 - Training & TTA	$42,863.00	$17,175.61	$25,687.39	40.07%
8560 - Computer & Software Related Expenses	$26,000.00	$139.50	$25,860.50	0.54%
8570 - Advertising & Community Sponsorships	$7,000.00	$3,624.67	$3,375.33	51.78%
8590 - Other Expenses	$3,000.00	$0.00	$3,000.00	0.00%
8595 - Subsidy Expense	$196,047.00	$106,455.40	$89,591.60	54.30%
Total - 8500 - Other Expense	**$285,560.00**	**$127,768.73**	**$157,791.27**	**44.74%**
Total - Other Expense	**$285,560.00**	**$127,768.73**	**$157,791.27**	**44.74%**
Net Income	**$0.00**	**($178,877.11)**	**$178,877.11**	**0.00%**

TO: Rebecca Reynolds, LIFT Community Action Agency, Inc.

FROM: Deletta Dean, Regional Vice President, Midwest Region

DATE: December 9, 2024

SUBJECT: Fiscal Year 2025 Network NTI Training Grant & Lodging Benefit

We are very pleased to share details of the FY 2025 Network NTI Training Grant & Lodging Benefit for your organization. We designed the Network NTI Training Grant & Lodging Benefit to provide greater value to the network and to reduce the administrative burden on network organization staff. As a reminder, this benefit replaced Slots in 2022. Please retain this memorandum and all attachments in your files as this information will be critical to planning and supporting your organization's training needs throughout the year.

Network NTI Training Grant & Lodging Benefit

The Network NTI Training Grant & Lodging Benefit will include the following elements:

- **Training Grant** – Every network organization will receive an expendable, unrestricted training grant to be deployed at their discretion to support the professional development needs of their staff. All grants, including this Training Grant, are dependent upon receipt of NeighborWorks America's final Federal FY 2025 appropriation.

- **Discounted Course Tuition for all NeighborWorks trainings in FY25**– All staff at every network organization will have access to a 30% discount of the tuition fees for NTIs. This will apply to regularly priced courses and will not apply to course pricing that has already been reduced.

- **Lodging at NeighborWorks Training Institutes (NTI)** – The first "*X number*"[1] of registrations from the network will receive the benefit of fully subsidized lodging, providing them with cost-free lodging for the duration of their attendance at the NTI in accordance with their course registration schedule. The Philadelphia NTI in February 2025 will have 850 free lodging benefit admissions available for network members and the projected number of free lodging benefit admissions for the New Orleans NTI in August 2025 is yet to be determined; the available admissions for subsequent NTIs will be announced as registration opens for the events. In FY24, the lodging benefits available to network registrants were not fully utilized and all network lodging request registrations received by the event registration deadlines were accommodated. Once the maximum number has been reached, the remaining registrants will be responsible for their own lodging arrangements and costs. A limited number of event-negotiated discounted room rates will be available to the general public at the event hotel.

[1] The maximum number of registrants who will receive this benefit will vary per NTI. Early registration will be crucial to ensure your team is able to take advantage of this benefit.

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Please reference the Frequently Asked Questions (FAQs) document attached for additional information and clarification.

NeighborWorks America NTI Training Grant & Lodging Benefit Contact:
Carolyn Young
NeighborWorks America, Midwest Region
(816) 714-1210
cyoung@nw.org

FY 2024 NeighborWorks Training Institutes

NTI Location	Dates	Registration Deadline
Philadelphia, PA	February 10 – February 14, 2025	January 17, 2025
New Orleans, LA	August 25 – 29, 2025	TBD

As always, network organizations are encouraged to register early for the NTIs. The fully subsidized lodging benefit, which provides attendees with cost-free lodging for the duration of their attendance at the NTI in accordance with their course registration schedule, is limited. This benefit is being offered on a first come, first served basis and, once we have reached the maximum number, all remaining registrants will be responsible for their own lodging arrangements and costs.

Registration

For NTI events in FY25, we are using the collabornation platform for event registrants and as the main location for all of your key event information, individualized schedule and assigned hotel lodging, when applicable. **Even if you have registered for prior NTIs, each event in this platform requires a full profile to be created for that specific event, including a login email and password. While you can continue to use the same email address, do not attempt to log into the site with your credentials for a prior NTI event.** The following link will take you to the online registration system for the NTI Philadelphia event only: https://collabornation.net/phillynti2025.

Network staff will not need a code to register for the NTIs. The registration system will authenticate registrants who select that they are a network member in their profile and choose from a pull down of network organizations to attach to their profile record, this will allow the system to apply the network discount of 30% to total tuition costs based on the courses selected (this will apply to regularly priced courses only and will not apply to course pricing that has already been reduced).

Lodging

The first "*X number*"[2] of network staff to register for an NTI will have the option to also register for lodging at no cost to them. The Philadelphia NTI in February 2025 will have 850 free lodging benefit admissions available for network members; the available admissions for subsequent NTIs will be announced as registration opens for those events. This benefit is non-transferrable and the name on the lodging registration will match the name as listed on the course registration. Only the person who registered for the

[2] The maximum number of registrants who will receive this benefit will vary per NTI. Early registration will be crucial to ensure your team is able to take advantage of this benefit.

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courses and who was able to reserve lodging at the same time will be able to officially check-in and check-out of the hotel.

NeighborWorks America cannot guarantee a room with two double beds, However, approximately one week prior to the event, all our reservations will be in the hotel's reservation system and attendees can contact the hotel directly at that time to request a double-bed room. Please be sure to include your request for a double-bed room when you register; although we cannot guarantee a double-bed room, we will submit your request to the hotel when we submit our lodging list.

If two participants want to share a room, only one participant (primary registrant) should reserve lodging (either by taking advantage of the lodging benefit if registrant is eligible, or by reserving a discounted-rate, at-own-expense room as is available); the other participant would select the "**Network Member No Lodging Needed**" option when registering. However, if for any reason, the primary registrant who reserved the room using the fully subsidized lodging benefit decides to cancel their registration from the event, the room is non-transferrable to the other participant. If the room was reserved at the discounted, at-your-own expense cost and the primary registrant decided to cancel their registration from the event, please contact the hotel directly **prior** to the event and in accordance with the hotel's reservation change/cancellation policy to make those adjustments. Once a participant who registered for the event with the Network Member Lodging Benefit cancels their registration from the event, their lodging reservation is cancelled as well.

The Lodging Benefit applies to NTIs only. Organizations selected by invitation, or through a competitive application, to participate in activities such as *Excellence in Governance, special convenings, programs and/or forums, membership meetings,* and/or the *Portfolio Strengthening Clinic* will be provided additional guidance specific to those events.

Meetings and Events

You will receive invitations and reminders about special initiative, programmatic or member meetings directly from the meeting host, including any special registration forms and instructions, prior to each NTI registration deadline.

Training Grants

LIFT Community Action Agency, Inc. has been recommended to receive $5,750.00 of unrestricted grant funds from the Neighborhood Reinvestment Corporation, dba NeighborWorks America. These grant funds are federal funds made available by the Consolidated Appropriations Act of 2025. This memo is an initial, non-binding notice of the intent to award these grant funds; the award and disbursement of grant funds is subject to the conditions outlined below.

The Training Grant funds are flexible and unrestricted, and are intended to support your staff's professional development needs and to help your organization build its capacity. Please see the details of your Training Grant:

TIER	AMOUNT OF AWARD
Tier 5	$5,750.00
0 NeighborWorks VISTA members	$ 0.00
TOTAL	**$5,750.00**

Based on staff size as reported through the FY2023 Annual Survey, every organization was placed in one of 5 tiers. Training Grant base amounts are assigned according to your organization's tier. Adjustments to base amounts were made based on the specific and unique needs of organizations by their regional

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representatives. Organizations with a NeighborWorks VISTA member receive an additional $500 per VISTA to specifically support the training and development activities of the NeighborWorks VISTA member.

This grant award is subject to the following conditions. Please note: these grant funds should not be recognized on the organization's financial statements until these conditions have been met.

- LIFT Community Action Agency, Inc. must meet NeighborWorks America's compliance requirements for receiving grants, including but not limited to timely submission of audit package, reporting, and compliance with the network charter agreement.
- LIFT Community Action Agency, Inc. must maintain the requisite organizational health standards. Organizations with a Vulnerable health rating and/or Provisional Charter status are ineligible to receive grants *unless* NeighborWorks America determines that sufficient progress has been made against the items noted in the organization's health assessment and allows an exception.
- NeighborWorks America must issue an *Investment and Grant Funds Letter* in its Grants Portal setting forth the terms and conditions of this award. LIFT Community Action Agency, Inc. acknowledges that acceptance of the grant funds pursuant to the *Investment and Grant Funds Letter* constitutes a binding obligation for both parties.
- LIFT Community Action Agency, Inc. acknowledges grant funds should not be recognized on the organization's financial statements until the preceding conditions are met.

If you have questions about this notification, please contact your organization's Regional Operations Coordinator as listed on page 2 of this memo.

Attached, please find the list of Frequently Asked Questions for FY2025.

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Program:	U.S. Department of Justice (DOJ), Office on Violence Against Women (OVW)
Funder:	DOJ
Funding Requested:	$600,000.00
Grant Purpose:	Supervised Visitation Program and Safe Exchange

The Justice for Families Program supports activities to improve the response of the civil and criminal justice system to families with a history of domestic violence, dating violence, sexual assault, and stalking, or in cases involving child sexual abuse.

LIFT Community Action Agency, Inc. seeks the Board of Directors' approval to apply for a $600,000 grant from the U.S. Department of Justice. This funding would provide the opportunity to hire LIFT employees to receive specialized training in supervised visitation and safe exchange practices, ensuring the safety and well-being of families in our community.

If awarded, LIFT Community Action Agency would establish a supervised visitation program, providing critical resources for safe parent-child interactions in Choctaw, McCurtain, and Pushmataha counties.

Program:	Rural Business Enterprise Grant
Funder:	USDA
Funding Requested:	$99,999.00
Grant Purpose:	LIFT Business Learning Academy

The USDA Rural Development is charged with assisting in the startup, development and expansion of small and emerging businesses and/or non-profits in rural communities.

LIFT Community Action Agency, Inc. seeks the Board of Directors' approval to submit an application in the amount of $99,999.00 to the USDA to support the creation of a LIFT Business Learning Academy.

If awarded, this learning academy will provide training in the areas of human resource management, technology training, and leadership development for new and existing small businesses in Choctaw county.

BOARD RESOLUTION
LIFT CAA BOARD OF DIRECTORS

SUBJECT: This Resolution of the LIFT Community Action Agency Board of Directors hereby reflects the Board's approval and authorization for LIFT Community Action Agency to make Application to USDA/Rural Development for a Rural Business Enterprise Grant

WHEREAS, LIFT Community Action Agency, Inc. is dedicated to enhancing the economic well-being of rural communities in Southeast Oklahoma, particularly in Choctaw County; and

WHEREAS, the establishment of the LIFT Business Training Center will provide essential business training and resources to potential and existing small business entrepreneurs in the region; and

WHEREAS, the Rural Business Enterprise Grant (RBEG) program, administered by USDA Rural Development, offers funding to support such initiatives that promote economic development in rural areas; and

WHEREAS, the Board of Directors recognizes the importance of securing funding to establish and sustain the LIFT Business Training Center, thereby enhancing opportunities for small business development and job creation in the community;

NOW, THEREFORE, BE IT RESOLVED that the Board of Directors of LIFT Community Action Agency, Inc. hereby authorizes the application to the USDA Rural Development for the Rural Business Enterprise Grant; and

BE IT FURTHER RESOLVED that Rebecca Porter, Executive Director of LIFT Community Action Agency, Inc., is hereby authorized to sign all necessary documents related to this grant application and to act on behalf of the organization in all matters pertaining to this application.

ADOPTED this 14TH day of January, 2025

_____ _____

David Hawkins, Board Chairman Date:
LIFT Community Action Agency, Inc.

OKLAHOMA Commerce

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

December 9, 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 (ODOC/CD) has received the first FY'25 Community Services Block Grant (CSBG) allocation. The funds are awarded by the U.S. Department of Health and Human Services/ Office of Community Services to revitalize communities and create opportunities for economic prosperity among low-income individuals and families.

Your agency's allocation is:

1st Allocation	$59,906.00
	$59,906.00

Please proceed to OKGrants (https://grants.ok.gov) to apply for the CSBG funds. This will begin the preparation for the eventual execution of an ODOC contract, effective January 1, 2025

Forms to be completed in OKGrants are:

1) Applicant Information
2) Budget Detail (use the allocation Amount shown above)
3) Upload (upload the electronic version of other documents as required in the CSBG RFA, which is found in the funding opportunity on OKGrants.gov)
4) Audit

A completed Pre-award Risk Assessment Questionnaire, which was emailed to you on November 20th, 2024, must be uploaded to your application before a contract is awarded. Applications are due by April 30, 2025; however, *we urge to submit your application as soon as possible*.

These funds may be used for expenses incurred on or after January 1, 2025, through September 30, 2026, and are available to be drawn when you have received a 2025 CSBG contract signed and executed by ODOC.

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

Sincerely,

Marshall L. Vogts

Marshall Vogts, Director
Community Development

Funding Entity: **Communities Foundation of Oklahoma**

Funding Opportunity: **Oklahoma Initiative Fund**

Amount Requested: **$15,000**

Program: **LIFT YouthBuild**

Since 2004, the Oklahoma Initiative Fund (O.I.F.) has invested hundreds of thousands of dollars through grants to organizations focused on improving the quality of life in communities - large and small - across Oklahoma. The annual grant process is managed by the Communities Foundation of Oklahoma grants committee/board of trustees. Eligible entities can apply for up to $15,000 in funding.

LIFT CAA is requesting the Board of Directors approval to submit an application in the amount of $15,000 to the Communities Foundation of Oklahoma for the Oklahoma Initiative Fund opportunity. If awarded these funds would be used to support the LIFT YouthBuild Program/activities.

The Lift YouthBuild program serves youth, ages 16-24, by providing training in construction-related educational and workforce development activities. YouthBuild is a pre-apprenticeship program that offers young people an opportunity to gain critical job skills through hands-on training in construction while also earning their high school diploma. The program targets youth who face a variety of personal and socio-economic challenges.

Through this project, YouthBuild seeks to provide specialized construction skills training to participants, giving these youth a hand-up, taking them beyond basic construction knowledge. With assistance from the Communities Foundation of Oklahoma, YouthBuild will purchase a CNC (Computer Numerical Control) wood cutting machine. Learning CNC operation focuses on STEM educational components and helps develop important technical skills that are in high demand in today's manufacturing and fabrication industries. Students will develop technical literacy with math, interpretation, planning/plotting, and project execution. This specialized training is an impactful way to equip participants with valuable, high-demand skills.

Funding Entity: NeighborWorks America
Funding Opportunity: NeighborWorks Flexible Impact Grant FY2025
Amount Requested: $260,000

All affiliated NeighborWorks Organizations in good standing are eligible for NeighborWorks Flexible Impact Grant funding. NeighborWorks America Flexible Impact Grant Awards fall into two categories:

1. Expendable
2. Capital

The expendable grant award is composed of four elements: Base, Organizational Health Tracking System Rating, Production, and Comprehensive Community Development. These four areas determine the amount of funding for which a NeighborWorks Organization is eligible to receive. Base award amounts for FY2025 are $87,000. The funding within the other three areas is unique to each organization's rating, production and levels of Comprehensive Development activities.

Expendable grant awards are used by LIFT Community Action Agency's housing department to support salaries and other operational costs for the numerous housing and lending lines of business.

NeighborWorks capital grant awards can be used for real estate development and lending. Additionally, those NeighborWorks organizations with an OHTS rating of exemplary, such as LIFT CAA have no restrictions on the use of funds. However, NeighborWorks America expects that these funds will be used to advance real estate development and/or lending activities. Capital Awards are made to eligible NeighborWorks organizations based on a review of the submitted reports as well as a review of the past four years of real estate development and lending activities.

LIFT CAA is requesting the board's approval to prepare and submit the required plans and other required documentation to NeighborWorks America to be eligible for consideration of both funding opportunities (expendable and capital) within the NeighborWorks Flexible Impact Grant FY2025 opportunity.

PROVIDER AGREEMENT
Oklahoma Early Childhood Program

This Provider Agreement (the "Agreement"), effective the 29th day of October 2024 ("Effective Date"), is by and between **Community Action Project of Tulsa County, Inc.** ("CAP Tulsa") with its principal place of business located at Legacy Plaza East Tower, 5330 E. 31st Street, Tulsa, OK 74135 and **LIFT Community Action Agency** ("Provider") with its principal place of business located at 209 4th Street Hugo, OK 74743 and mailing address as the same.

Background

CAP Tulsa has been named by the State of Oklahoma, the grantee and fiscal agent for the State of Oklahoma Early Childhood Program (the "Program" or "OECP"), under which the State of Oklahoma will provide funding to be administered to certain early education service providers under certain conditions. The overarching goal of the OECP is to provide quality early education services and expand capacity to serve additional eligible low-income children ages birth (0) through three (3) years old. CAP Tulsa will administer the funding to each Provider and has an OECP Administrative Staff who will work with each Provider to, among other things, oversee compliance ("CAP Tulsa OECP Administrative Staff").

NOW THEREFORE, in consideration of the foregoing premises and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties agree as follows:

1. Funding.

A. Provider agrees to obtain sixty percent (60%) matching dollars through private donations. When private fund commitments are received, Provider must obtain and submit to CAP Tulsa OECP Administrative Staff a certified letter of commitment (as described below) from each private donor within sixty (60) days from the date of this Agreement. If despite its best efforts Provider has not raised matching funds within the sixty (60) day period, then Provider may be eligible to receive secured private funds designated for the Program that have not been committed to a specific Provider. If Provider is not eligible to receive the non-committed private funds, then this Agreement shall automatically terminate and neither Provider nor CAP Tulsa shall have any obligation or liability to the other in connection with such termination. Provider further agrees that upon application and approval by CAP Tulsa OECP Administrative Staff, additional Federal Grant dollars may be used as match provided additional children are being served with the funds. Although additional children will be served, the Provider's requested draw from OECP will not increase.

B. A certified funding letter must:

i. Be on the letterhead of the private donor;
ii. Be signed by an authorized representative of the private donor;
iii. Set forth the committed amount; and
iv. May, if applicable, specify the agency and/or Site (defined below) for which the money is earmarked.

C. Provider understands that all private funds obtained by Provider for the purpose of matching funds under the Program will be paid directly to CAP Tulsa, and CAP Tulsa will distribute the private funds to Provider as further discussed below. Notwithstanding the foregoing, if Provider has already received matching funds from a private donor, or if the awarding agency cannot release funds directly to CAP Tulsa, then Provider may submit to CAP Tulsa a copy of the check or other documentation of deposit.

D. If at any point the Oklahoma State Legislature reduces the budget for OECP during the program year, such reduction would have immediate effect and approved partner budgets would be reduced accordingly.

E. The parties acknowledge that Provider may offer early education services at multiple locations, each referred to herein as a "Site," and that Provider may participate in the Program at one Site or multiple Sites. In the event that Provider participates in the Program at multiple Sites, Provider will submit a combined budget for all Sites, and must provide matching private funding for all Sites. The terms and conditions of this Agreement apply to each Site individually.

F. If the Provider qualifies for the Child and Adult Care Food Program ("CACFP") or Oklahoma Human Services ("OKDHS") Childcare Subsidy, the Provider must fully enroll all eligible children and maximize all possible funding options by completing all claims accurately and in a timely manner prior to using OECP dollars.

G. Provider shall acknowledge that if it receives or collects any funds from parent such funds may not be counted as matching funds under the Program. Parent fees shall be classified as program revenue.

2. Children Eligible for the Program.

A. Children ages birth (0) through three (3) years (i.e., children that have not reached their fourth (4th) birthday by September 1st of the enrollment year) that meet any of the following criteria at time of enrollment are eligible for the Program:

i. The family income is at or below 185% of the then current Federal Poverty Level Guidelines as published in the Federal Register each January;
   a) Supplemental Security Income (SSI), Oklahoma Temporary Assistance for Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP) can be used to document income eligibility.

ii. The family can demonstrate eligibility for OKDHS Subsidy or Tribal Child Care Assistance;

iii. The child is in foster care;

iv. Homeless;

v. Diagnosed and/or Suspected as Disabled.

B. If after enrollment a child reaches his/her fourth (4th) birthday, that child may continue his/her enrollment through the Program fiscal year end. Further, if after enrollment a child's family income exceeds the income eligibility set forth in 2(A), the child is no longer in foster care or classified as homeless, that child may continue his/her enrollment through the Program fiscal year end.

C. Documentation of family income at the time of enrollment must be maintained by Provider for all eligible children. Provider understands that CAP Tulsa OECP Administrative Staff will have the right to engage in unscheduled inspections of child eligibility documents as deemed necessary.

D. Ninety percent (90%) of children in Program classrooms at each Site must meet one or more of the eligibility requirements above.

3. Enrollment.

Provider must maintain its Program budgeted enrollment level as proposed in the Provider budget (further described in Section 13), which is incorporated herein by reference. All vacancies must be filled within thirty (30) calendar days. Provider must maintain a waitlist at the beginning of each enrollment year and maintain during the year a waiting list that ranks children according to the program's selection criteria. Provider will ensure that attendance is maintained at eighty-five percent (85%).

4. Service Delivery Objectives.

A. The Program service delivery objectives are designed to effectively and consistently help children maximize their learning and growth potential and include, but are not limited to, developing and providing high quality, individualized, child development services, as evidenced by adherence to the Program Requirements which are incorporated herein by reference and documented in a written Service Plan ("Service Plan") by Provider. Oklahoma Early Childhood Program requires a Service Plan from each provider. Providers participating in the Program for the first time must provide the Service Plan to CAP Tulsa OECP Administrative Staff within thirty (30) calendar days after execution of this Agreement if not already attached to the Application. Providers previously participating in the Program must update/maintain its existing service plan annually through the reapplication process. For Head Start Providers, the Service Plan or other comparable document must be available for review by CAP Tulsa OECP Administrative Staff upon Site visits.

B. Children should develop skills in the following domains, as aligned with Oklahoma's Early Learning Guidelines, with the long-term goal of ensuring a smooth transition to public school, Head Start and other preschool programs. Transition plans will be developed, in collaboration with the child's family, for children moving from OECP classrooms to preschool classrooms and may be viewed by CAP Tulsa OECP Administrative Staff at time of visits. Transition plans should include:

i. Development of resilience;

ii. Creative arts expressions;
iii. Approaches to learning;
iv. Language development;
v. Literacy knowledge and skills;
vi. Logic and reasoning;
vii. Mathematics knowledge and skills;
viii. Social studies and skills; and
ix. Physical development and health.

C. A program objective for the families of participating children is the promotion of parents' self-sufficiency, including employment.

5. Family and Community Relationships.

A. Provider agrees to build and engage in community partnerships with other service providers. Provider will take an active role in community planning to encourage strong communication, cooperation, and the sharing of information among agencies and their community partners and to improve the delivery of community services to children and families. Documentation must be maintained to reflect the level of effort undertaken to establish community partnerships and available for review by the CAP Tulsa OECP Administrative Staff.

B. Provider agrees to take affirmative steps to establish ongoing collaborative relationships with community organizations to promote the access of children and families to community services that are responsive to their needs, including the following:
i. Health care providers;
ii. Mental health providers;
iii. Nutritional service providers;
iv. Individuals and agencies that provide services to children with suspected and/or diagnosed disabilities and their families;
v. Family preservation and support services;
vi. Child protective services;
vii. Local elementary schools and other educational and cultural institutions, such as libraries and museums, for both children and families;
viii. Providers of child care services; and/or
ix. Other organizations or businesses that may provide support and resources to families.

C. In building family partnerships and ensuring that enrolled families have access to community resources that will meet their needs, Provider will work collaboratively with families to identify and access, directly or through referrals, services and resources that are responsive to each family's interests and goals, including:
i. Emergency or crisis assistance in areas such as food, housing, clothing, and transportation;

ii. Education and other appropriate interventions, including opportunities for parents to participate in counseling programs or to receive information on mental health issues that place families at risk, such as substance abuse, child abuse and neglect, and domestic violence; and
iii. Opportunities for continuing education and employment training and other employment services through formal and informal networks in the community.

D. After providing such access or referral, providers must follow-up with each family to determine whether the kind, quality, and timeliness of the services received through referrals met the families' expectations and circumstances. Information learned at follow-up must be documented.

6. Operational Schedule.

Qualifying programs must operate on a year-round basis, eight (8) hours a day, forty-six (46) weeks a year, children will be served forty-four (44) weeks a year with two (2) weeks of staff training and professional development.

7. Quality Assurance.

A. Provider will provide CAP Tulsa OECP Administrative Staff with all relevant materials and documentation to allow monitoring of compliance with this Agreement. This includes National Association for the Education of Young Children ("NAEYC") Accreditation, Service Plan, Head Start audits, and OKDHS visitation documentation. NAEYC Accreditation and Service Plan not applicable for Head Start Providers.

B. Provider must notify CAP Tulsa OECP Administrative Staff within ten (10) days of any of the following occurrences as well as promptly submit a copy of the documentation.

i. At time any of the following occur:
   a) OKDHS Compliant Visit
   b) OKDHS Follow Up Visit
   c) OKDHS Substantiated Finding
   d) Head Start Visit
ii. Any circumstance negatively effecting or resulting in a change to OKDHS licensing, Tribal, Head Start or STAR status;
iii. The loss of NAEYC Accreditation (if applicable);
iv. The loss of a required staff member as set forth in Section 9; and/or
v. An inability to meet any of the provisions of this Agreement.

C. If there is a lack of compliance with OKDHS, Tribal, Head Start, NAEYC, or licensing requirements, the non-compliance will be brought into compliance by the date required. If there is a serious or continuous lack of compliance with these Program Requirements or any provision of this Agreement, CAP Tulsa OECP Administrative Staff will advise the Provider if it may informally correct the non-compliance and report back, or if the

Provider must submit a Plan of Correction to CAP Tulsa OECP Administrative Staff within the time frame as requested. A mutually agreed upon timeframe for correction will be based upon the degree of risk to children.

D. CAP Tulsa OECP Administrative Staff will have access to the Provider's compliance with any programs, tools, technology systems, or documentation for monitoring, training, and any other issues that Provider may have with regard to this Agreement.

E. Any required Plan(s) of Correction should be submitted immediately by Provider to CAP Tulsa OECP Administrative Staff and will be incorporated within this agreement.

8. Reporting.

Provider agrees to submit a Monthly Report via the OECP Partner Portal (http://oecp.captulsa.org/) by the fifteenth (15th) of each calendar month or first (1st) business day thereafter for the previous month.

A. Provider agrees to complete the Monthly Report via the Program Partner Portal. The report requires information regarding the status of classroom operation, staffing requirements, training requirements, and information pertaining to other Program guidelines.

B. Provider agrees to complete the Staff Credentialing report via the Program Partner Portal on a monthly basis or as changes occur in staffing.

9. Staffing.

A. Provider will meet, at a minimum, the following staffing requirements:

i. Provider must fill all classroom staff vacancies within sixty (60) calendar days.

ii. Lead teachers must hold one of the following:

a) an associate's degree (AA), baccalaureate degree (BA), or master's degree (MA) in early childhood, child development, elementary education, or early childhood special education

b) an associate's degree (AA), baccalaureate degree (BA), or master's degree (MA) in social work, nursing, psychology, human development and family studies and 1 year experience as a teacher

c) at least sixty (60) college/university credits with at least thirty (30) college credits in early childhood education, child development, elementary education, or early childhood special education

d) a baccalaureate degree or higher in any discipline with at least thirty-six (36) college credits in early childhood education, child development, elementary education, or early childhood special education

iii. Assistant teachers must hold one of the following:

a) a high school diploma and a current Child Development Associate ("CDA") degree (120 clock hours)

b) a high school diploma and at least twelve (12) college credits in early childhood education, child development, elementary education, or early childhood special education
c) one of the options outlined in A. ii

iv. Lead Teachers must be paid a salary comparable to that of a public school teacher in the same geographic area as Provider if Lead Teacher has equal credentials and years of experience. Increases to maintain equivalent salary resulting from state funded teacher pay raises are contingent upon either (1) Provider's ability to secure additional funding for such increases or (2) an increase from the state in OECP funding for the purpose of increasing Lead Teacher salaries across OECP Providers. In the absence of either, Provider will be expected to maintain salary levels from previous year.

v. Any staff member not meeting the requirements outlined in nine (9). A. above will be given an Individual Development Plan ("IDP") and meet requirements within a two (2) year period from date beginning in OECP-funded classroom.

vi. Family Support Specialist must hold a bachelor's degree in early childhood education, child development, family relations, family studies, family consumer sciences, or related field or a credential/certification in social work, human services, family services, counseling, or a related field within eighteen (18) months of hire. The caseload for each family support worker will be one (1) Family Support Specialist per fifty (50) families.

vii. In the event of a new hire, Provider must provide staffing credentials to CAP Tulsa OECP Administrative Staff within thirty (30) days of hire. This includes CDA, transcripts, and a copy of any certifications with the expiration date.

B. Provider must staff two (2) teachers for every classroom. At least one (1) of the teachers must meet the Lead Teacher requirements above, while the other staff person must meet the Assistant Teacher requirements above. All Staff members having contact with children in the program must undergo a Federal Bureau of Investigation ("FBI") background check and must meet all current OKDHS licensing requirements.

10. Training and Professional Development.

A. CAP Tulsa OECP Administrative Staff will provide Training and Technical Assistance which includes the OECP Summit, initial and annual training in infant and toddler development, curriculum, and parent education, as well as other, various trainings upon request. The Technical Assistance visits support positive change for relationship-based, culturally sensitive, and strength-based approach which assists in the collaboration with OECP partners to establish consistent procedures. These procedures allow the Provider to assess their program and allow informed decision making for program improvements.

B. Provider will ensure all classroom staff in birth (0) to three (3) classrooms complete West-Ed based PITC training provided by CAP Tulsa OECP Administrative Staff or other fully certified West-Ed trainers. Training is comprised of PITC Modules I, II, III, and IV to be completed within one (1) year of hire date or entry into an OECP-funded classroom. Any classroom staff including classroom aides, full-time floaters or

substitute teachers must attend the trainings. Site administrators, directors, curriculum coordinators, and other staff members are also encouraged to participate in West-Ed based PITC training when possible.

C. If training is provided by someone other than CAP Tulsa OECP Administrative Staff the training must meet the following parameters and documentation must be provided to CAP Tulsa OECP Administrative Staff:

i. Certified PITC Trainer Certificate;
ii. Credentials will be verified via the West-Ed website
iii. Trainings will be updated on the OECP portal for the option to allow other provider's staff to attend;
iv. Training must be explicit to PITC as no other trainings can be combined or included in the eight (8) hours of PITC training;
v. Sign in sheets must be received by CAP Tulsa OECP Administrative Staff within five (5) business days. OECP does not require certificates. If training is split within two (2) sessions the sign in sheets must match up the names to ensure they have had the full training and noted on the sign in sheets before forwarding to CAP Tulsa OECP Administrative Staff;
vi. Staff must be trained on all four (4) modules within one year of hire date or entry into an OECP-funded classroom; and
vii. CAP Tulsa OECP Administrative Staff reserves the right to attend and observe the trainings.

D. Provider will ensure that all classroom staff participate in professional development training that aligns and supports the core Center for Early Childhood Professional Development ("CECPD") competency areas, various program standards, knowledge areas and competency levels needed by age group served and will submit verification of continuation training to the CAP Tulsa OECP Administrative Staff upon request. Examples of this type of verification may include a training agenda, key objectives of the training and/or training sign-in sheet(s).

E. Provider will ensure its supervisory staff and family support staff attends the CAP Tulsa OECP Summit training which is including but not limited to Site Directors/Managers, Program Managers, Lead Teachers, Instructional Coaches and Family Advocates. Training is expected to be held in the fall with the exact date and time to be announced.

11. Curriculum Tools / Collection of Data / Program Evaluation / Release.

A. Provider may use any of the OECP approved technology systems for classroom curriculum, assessment, and data collection. Provider must enter all collected child assessment data into their preferred and approved technology system, and Provider's system administrator must allow CAP Tulsa OECP Administrative Staff access to all reporting mechanisms for the Program classrooms, which includes all child assessment data collected. Staff responsible for collecting and entering child assessment data should receive training to use the tools.

B. Provider acknowledges that OECP has contracted with an evaluator to administer assessments related to classroom quality, teacher, child, and family outcomes. Information from these assessments may be used by the Oklahoma Department of Education when evaluating the effectiveness of early childhood programs and to help determine the amount of future funding for such programs. Provider agrees to participate fully in these assessments, which includes allowing the observation of classrooms.

i. Provider acknowledges that a copy of the program evaluation and any other information or documentation provided to OECP and/or CAP Tulsa OECP Administrative Staff pursuant to this Agreement may be provided to the Oklahoma State Department of Education for review.

ii. Provider acknowledges that it will be asked to sign a consent directly with an evaluator allowing the assessment/observation, and that OECP nor CAP Tulsa shall have any liability whatsoever because of such consent. Provider assumes all responsibility for any act or omission by Provider or the evaluator in connection with or arising out of the contract between Provider and the evaluator for such assessment/observation. Provider hereby agrees to indemnify and release OECP, CAP Tulsa and subsidiaries, predecessors, successors and assigns, and anyone claiming through them (collectively the "Releases'"), from any and all claims, suits, debts, liabilities, damages and any other costs and expenses arising out of or in any way relating to the contract between Provider and the evaluator, the evaluator's assessments, observations, or performance of same, and any act or omission of the evaluator's employee, whether within the scope of employment or otherwise.

iii. If Provider contracts with an evaluator directly to conduct the same or similar assessments, Provider is required to share non-aggregated data with OECP.

12. Other Program Requirements.

A. Program Requirements Compliance. Providers participating in the Program for the first time agree to be in full compliance with all Program Requirements within ninety (90) days of execution of this Agreement. Providers previously participating in the Program are expected to be in compliance with the Program Requirements on the Effective Date of this Agreement.

B. National Association for the Education of Young Children ("NAEYC") or National Association for Family Child Care ("NAFCC"). A Provider that is not currently accredited by NAEYC or NAFCC and is participating in its first year of the Program must begin the NAEYC or NAFCC accreditation process by October 29, 2024. A Provider participating in its third year of the Program, must receive accreditation by October 29, 2024. Once a Provider receives its accreditation, it must maintain such accreditation to continue participation in the Program. Not applicable for Head Start Providers.

C. Oklahoma Human Services. Provider represents it is currently a childcare provider licensed by OKDHS. Provider must at all times be in compliance with OKDHS licensing requirements affecting childcare providers.

D. Federal and State Laws. Provider represents that it will comply with the federal Equal Employment Opportunity requirements and any other relevant federal or state laws that may be applicable to Provider.

13. Budget / Audit.

A. Prior to the execution of this Agreement, Provider submitted to CAP Tulsa OECP Administrative Staff for approval, an OECP Operating Budget showing funding sources, administrative and operating expenses, and capital expenditures, for the period beginning October 29, 2024, and ending June 30, 2025. All funds on Provider's approved OECP Operating Budget are reimbursable, as well as any license fees associated with the use of their preferred and approved technology system.

B. Provider understands that Program funds may not be requested for amounts already funded by another funding source and may not be used to supplant existing funding. For example, when enhancing existing teacher positions (i.e., increasing an existing salary for a specific teacher), the budget must reflect, and reimbursement may only be claimed for incremental costs above the original salary of such teacher. Provider must sign the Affidavit attached hereto as **Exhibit A**, evidencing Provider's understanding and agreement with regard to supplanting.

C. Provider agrees to comply with all terms and conditions as set forth in the Budget Instructions and the pre-approved OECP Operating Budget.

D. CAP Tulsa has created a process for submitting an annual request for wage increases. Once submitted these requests will be reviewed, evaluated, and recommended for approval as appropriate by CAP Tulsa Accounting Department (oecpbilling@captulsa.org).

E. At any time upon ten (10) business days prior written notice during the Term of this Agreement and for a period of one (1) year thereafter, Provider will make available, during normal business hours, to CAP Tulsa Accounting Department (oecpbilling@captulsa.org) and/or its authorized representatives any and all documents and records that are related to this Agreement.

F. Budget variances should be kept within a +/- 10% range. Anything beyond that would warrant a budget revision and approval.

G. An annual independent financial audit report must be included with the Applicant Information and Proposal documents each year.

14. Invoicing / Reimbursement.

A. If Provider was meeting all of the requirements contained in this Agreement as of October 29, 2024, then upon execution hereof, Provider may submit invoices for the

period beginning October 29, 2024, through present, or such other period after October 29, 2024, during which Provider was meeting all requirements. Notwithstanding the foregoing, Provider may submit invoices for expenses incurred thirty (30) days or less prior to Provider's meeting the staffing requirements of this Agreement.

B. Provider will submit invoices for reimbursable expenses by the fifteenth (15th) of each calendar month or first (1st) business day thereafter for expenses incurred in the previous month. Invoices will be submitted to the CAP Tulsa Accounting Department (oecpbilling@captulsa.org), with a copy to CAP Tulsa OECP Administrative Staff. CAP Tulsa OECP Administrative Staff will review all invoices and verify that each invoice only contains reimbursable charges and only for eligible children. Payment will be received from CAP Tulsa within thirty (30) days of invoice processing. Monthly invoices will not exceed the cumulative one twelfth (1/12th) of Provider's state budgeted funds based upon the Provider's pre-approved OECP Operating Budget. This requirement aligns with CAP Tulsa's monthly invoicing process set forth by the State Department of Education.

15. Insurance.

Provider will obtain and maintain the following insurance coverage during the entire term of this Agreement. In the event Provider's required insurance is cancelled during the term of this Agreement, or coverage is reduced below the limits required in this Section, Provider is required to ascertain that its insurance company provides written notice to CAP Tulsa OECP Administrative Staff thirty (30) days prior to the effective date of such cancellation or change. Provider will provide the CAP Tulsa OECP Administrative Staff with proof that the foregoing insurance is in full force and effect.:

A. Worker's Compensation Insurance in accordance with the laws of the State of Oklahoma;

B. Comprehensive General Liability insurance covering bodily injury and property damage with a limit of no less than one million dollars ($1,000,000) each occurrence;

C. If transportation for children in the Program is provided, then Comprehensive Automobile Liability insurance with a combined bodily injury and property damage single limit of one million dollars ($1,000,000) per occurrence; and

D. Errors and Omissions insurance in an amount not less than one million dollars ($1,000,000) per occurrence.

16. Disputes.

CAP Tulsa and Provider agree that if a dispute directly or indirectly arises out of or related to this Agreement, the parties will attempt to settle the dispute through good faith negotiations with each other. If those negations do not mutually resolve the dispute, either party may pursue its rights under law or equity.

17. Term of Agreement / Term of Program.

This Agreement is effective upon the Effective Date set forth above and is co-terminus with the term of the Program. The term of the Program as determined by the Oklahoma State Legislature is October 29, 2024 through June 30, 2025.

18. Termination.

A. CAP Tulsa may, in its sole and exclusive discretion, immediately upon written notice and without liability of any kind to Provider, either: a) suspend reimbursements to Provider until the applicable violation has been remedied as determined solely by CAP Tulsa, or b) terminate this Agreement; for any of the following reasons:

i. Provider's breach of any material provision of this Agreement. Without limiting the generality of the foregoing, Provider's failure to provide staffing as required in Section 9 and staff training as required in Section 10. Time is of the essence with regard to staffing requirements.

ii. Failure of Provider to maintain the required insurance for any reason, including termination by the Insurance provider.

iii. Provider's loss of licensing through OKDHS.

B. Both CAP Tulsa and Provider may terminate this Agreement for convenience upon thirty (30) days' written notice.

19. Indemnification.

Provider will defend, indemnify and hold CAP Tulsa and its officers, directors, managers, employees, agents and representatives harmless from and against any injury, liability, suits, claims, losses or damages of any kind or nature whatsoever, (including punitive damages, attorney fees, disbursements, and all other costs and expenses incurred in the investigation, defense or settlement of any claims covered by this indemnity) for claims (all referred to as "Claims") arising directly or indirectly out of or in any way connected with Provider's negligence of willful acts or omissions, except those Claims caused or occasioned solely by the negligence or willful misconduct of the indemnified party.

20. Limitation of Liability.

Except as otherwise provided herein, neither CAP Tulsa nor Provider, nor their respective officers, directors, agents, managers, employees agents, representatives or consultants shall be liable to the other for any indirect, special, punitive, or consequential damages, loss of profits or revenues, or exemplary damage of any kind arising out of this Agreement or from any breach or partial breach of the provisions of this Agreement or arising out of any act or omission of either of the parties, their respective employees, officers, directors, subcontractors, agents, representatives, whether arising under theories of contract or tort and regardless of whether such party was advised, or had reason to know, or in fact knew of the possibility thereof.

21. Disclaimer of Warranty.

CAP TULSA DISCLAIMS ALL WARRANTIES, EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR USE, TITLE, NON-INFRINGEMENT OR OTHER WARRANTIES OF ANY KIND. CAP TULSA DOES NOT WARRANT THE AVAILABILITY OF MONEY FROM THE STATE OF OKLAHOMA.

22. Governing Law / Venue.

This Agreement shall be subject to, and interpreted by and in accordance with, the laws of the State of Oklahoma, without regard for its choice of law principals. Any cause of action for a breach or enforcement of, or a declaratory judgment respecting, this Agreement shall be commenced and maintained only in the United States District Court for the Northern District of Oklahoma or the applicable Oklahoma state trial court sitting in Tulsa, Oklahoma and having subject matter jurisdiction.

23. Counterparts.

This Agreement may be executed in counterparts, each of which shall be deemed an original. This Agreement may be executed and delivered by a facsimile or digitized transmission of a counterpart signature page hereof.

24. Attorney Fees.

In any action brought by a party hereto to enforce the obligations of any other party hereto, the prevailing party shall be entitled to collect from the opposing party to such action such party's reasonable litigation costs and attorneys' fees and expenses including court costs, reasonable fees of accountants and experts, and other expenses incidental to the litigation.

25. Binding Agreement.

This Agreement shall be binding upon and shall inure to the benefit of the Parties and their respective successors and permitted assigns.

26. Assignment.

This Agreement may not be assigned (including performance by subcontract) by any party hereto without prior written consent of the other party, which shall not unreasonably be withheld.

27. No Third-Party Beneficiary.

This is not a third-party beneficiary contract. No person or entity other than a party signing this Agreement shall have any rights under this Agreement.

28. Amendments.

This Agreement may be amended or modified only in a writing which specifically references this Agreement.

29. Independent Contractors.

Nothing in this Agreement shall be construed to create a partnership or joint venture, nor to authorize any party hereto to act as agent for or representative of any other party hereto. Each party hereto shall be deemed an independent contractor and no party hereto shall act as, or hold itself out as acting as, agent for any other party hereto.

30. No Waiver.

A party to this Agreement may, on a single occasion or on multiple occasions, waive or fail to require full or timely performance of any obligation arising under this Agreement, and such waiver or failure to require full or timely performance shall not be deemed a permanent waiver of any such obligation. No such decisions or failures shall give rise to any claim of estoppel, laches, course of dealing, amendment of this Agreement by course of dealing, or other defense of any nature to any obligation arising hereunder.

31. Severability.

In the event any provision of this Agreement, or the application of such provision to any person or set of circumstances, shall be determined to be invalid, unlawful, or unenforceable, the remainder of this Agreement shall continue to be enforceable to the fullest extent permitted by law.

32. Entire Agreement.

This Agreement and all Exhibits attached hereto set forth the entire, final, and exclusive agreement between the parties as to the subject matter hereof and supersedes all prior and contemporaneous agreements, understandings, negotiations, and discussions, whether oral or written, between the parties.

IN WITNESS WHEREOF, each of the persons signing below on behalf of a party hereto represents and warrants that he or she has full requisite power and authority to execute and deliver this Agreement on behalf of the parties for whom he or she is signing and to bind such party to the terms and conditions of this Agreement.

[Remainder of this page intentionally left blank; signature page follows]

IN WITNESS WHEREOF, the Parties have duly executed this Service Agreement on the date indicated by the signature below.

CONTRACTOR

R Porter
Signature

Rebecca Porter
Print Name

Executive Director
Title

11/08/2024
Date

COMMUNITY ACTION PROJECT OF TULSA COUNTY, INC.

Signature

Michael Madsen
Print Name

Chief Financial Officer
Title

November 20, 2024
Date

EXHIBIT A

AFFIDAVIT

STATE OF OKLAHOMA)
) ss.
COUNTY OF Choctaw)

I, Rebecca Porter, do hereby swear, depose, and state the following:

1. I understand that program expenses are costs that are associated with meeting the OECP program guidelines.

2. All expenses reflected in my OECP program budget meet the standards set out in Section 1 above.

3. I understand that I may not budget for or request funds from the OECP program for expenses that are already funded by another source.

4. I have not requested in my budget any expenses that are already being funded by another source.

5. I will not supplant (to usurp or take the place of) any existing funding with dollars from the OECP program.

6. I understand that any in-kind funds used as a match for the OECP program must be used exclusively for the OECP program and may not be used as match for any other program requiring matching funds.

Dated this 8th day of November, 2024.

Affiant:

R Porter

Subscribed and sworn to before me this 8th day of November, 2024.

Lori Henry
Notary Public

My Commission Expires: 09-06-2026

Commission Number: 18008985

LORI HENRY
Notary Public, State of Oklahoma
Commission # 18008985
My Commission Expires 09-06-2026

723 Little Dixie (LIFT CAA)
Financial Contact/Number Below
Sheree Ensley, Accounting Supervisor
(580) 326-3351

BUDGET

2024-2025 School Year
OECP-Birth thru Three

Date Submitted: 3/12/2024
Date Accounting Approved:

AC	ACCOUNT NAME	2024 July	August	September	October	November	December	2025 January	February	March	April	May	June	Total
	Number of Slots													#DIV/0!
	Revenue													
	STATE REIMBURSEMENT	9,068.44	9,068.42	9,068.42	9,068.42	9,068.42	9,068.42	9,068.42	9,068.42	9,068.42	9,068.42	9,068.41	9,068.41	108,821.05
	PROVIDER MATCH FUNDING (CAP/GKFF)	13,602.67	13,602.63	13,602.63	13,602.63	13,602.63	13,602.63	13,602.63	13,602.63	13,602.63	13,602.63	13,602.62	13,602.62	163,231.57
85595	In Kind (Partner)	-	-	-	-	-	-	-	-	-	-	-	-	-
85596	Non-Eligible Match (Partner)	-	-	-	-	-	-	-	-	-	-	-	-	-
85597	Eligible Match (Partner)	-	-	-	-	-	-	-	-	-	-	-	-	-
	Program Revenue													
85598	Subsidy Reimbursement (DHS,etc)													-
85599	CACFP													-
	Total Revenue	22,671.11	22,671.05	22,671.05	22,671.05	22,671.05	22,671.05	22,671.05	22,671.05	22,671.05	22,671.05	22,671.03	22,671.03	272,052.62
	Operating Expenses													
85516	SALARIES & BENEFITS	18,998.93	18,998.93	18,998.93	18,998.93	18,998.93	18,998.93	18,998.93	18,998.93	18,998.93	18,998.93	18,998.93	18,998.93	227,987.16
85517	CONTRACT LABOR													-
85519	PRE-EMPLOYMENT COSTS													-
85520	FOOD COSTS													-
85521	MEALS/TRAVEL	434.06	434.00	434.00	434.00	434.00	434.00	434.00	434.00	434.00	434.00	434.00	434.00	5,208.06
85522	TRAINING													-
85523	DUES AND FEES													-
	Educational Supplies													
85524	SUPPLIES	25.02	25.02	25.02	25.02	25.02	25.02	25.02	25.02	25.02	25.02	25.00	25.00	300.20
85525	DURABLE SUPPLIES/EQUIP													-
	Total Operating Expenses	19,458.01	19,457.95	19,457.95	19,457.95	19,457.95	19,457.95	19,457.95	19,457.95	19,457.95	19,457.95	19,457.93	19,457.93	233,495.42
	Other Expenses													
85526	ADMIN ALLOCATION	3,041.02	3,041.02	3,041.02	3,041.02	3,041.02	3,041.02	3,041.02	3,041.02	3,041.02	3,041.02	3,041.02	3,041.02	36,492.24
85527	TELEPHONE	52.08	52.08	52.08	52.08	52.08	52.08	52.08	52.08	52.08	52.08	52.08	52.08	624.96
85528	UTILITIES	120.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00	120.00	1,440.00
85529	RENT/FACILITIES													-
85530	SECURITY													-
85531	MISC EXP													-
855XX	OTHER (specify)													-
	Building Expense													
85533	REPAIRS AND MAINTENANCE													-
85534	JANITORIAL SALARIES & BENEFITS													-
85535	JANITORIAL SUPPLIES													-
	Total Other Expenses	3,213.10	3,213.10	3,213.10	3,213.10	3,213.10	3,213.10	3,213.10	3,213.10	3,213.10	3,213.10	3,213.10	3,213.10	38,557.20
	Total Expenses	22,671.11	22,671.05	22,671.05	22,671.05	22,671.05	22,671.05	22,671.05	22,671.05	22,671.05	22,671.05	22,671.03	22,671.03	272,052.62

Note: Costs are the incremental expenses to improve quality of the "slots" and classrooms identified above, over and above the costs expended on those slots or classrooms prior to OECP implementing.

LIFT Community Action Agency, Inc.

G-SUPINT-2025-76421 - Payment ID: 21808905 - $5,750.00 - Paid: 12/17/2024

Grant: Network Supplemental Request Internal FY25

Click here to view Grant Application

Payment Details

Amount Paid:	$5,750.00
Payment Type:	Standard ACH
Payment Confirmation Number:	1296756
Paid At:	12/17/2024

Check Date: 12/17/2024 **Check No:** 3000157532

Invoice Number	Invoice Date	PO Number	Voucher ID	Gross Amount	Adjustments	Paid Amount
107099	12/16/2024		00769318	500.00	0.00	500.00

RSVP Senior Citizen Program Sponsor

Vendor Number	Vendor Name		Public Service Co of Ok - Dist
0000137481	LIFT COMMUNITY ACTION AGENCY INC		P O Box 24400
Total Amount	**Total Adjustments**	**Total Paid Amount**	Canton, OH 44701
$500.00	$0.00	$500.00	877/286-2729

THE FACE OF THIS DOCUMENT HAS A COLORED BACKGROUND – NOT A WHITE BACKGROUND

AMERICAN ELECTRIC POWER

Public Service Co of Ok - Dist
P O Box 24400
Canton, OH 44701

Citibank, N.A.
New Castle, DE 19720
62-20/311

3000157532
Date 12/17/2024

$500.00
DOLLAR FIVE ZERO ZERO PERIOD ZERO ZERO

Pay ****FIVE HUNDRED AND XX/100 ****

Pay Amount $500.00***

To The Order Of
LIFT COMMUNITY ACTION AGENCY INC
209 N 4TH ST
HUGO OK 74743

Jeffrey W Hoersdig
Authorized Signature

THIS DOCUMENT IS PRINTED ON WATERMARKED PAPER – HOLD TO LIGHT TO VIEW

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Powers, Responsibilities, and Role of the Board

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

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

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

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

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

(b) Compliance with 75:15-13-29 shall be determined by:
(1) Review of program's policies and procedures;
(2) Review of program's training records and other provided documentation of staff or volunteer training; and
(3) Review of personnel records.

SUBCHAPTER 15. GOVERNING AUTHORITY

75:15-15-1. Governing authority

(a) The agency shall have a governing authority. In the instance of Native American programs, the tribal council may be the governing body.

(b) The governing authority shall establish, and function under, written by-laws. These by-laws shall minimally include:
(1) Designation of regular quarterly meetings to be held in accordance with the Open Meeting Act;
(2) Recording and retention of written minutes;
(3) Eligibility criteria, selection, terms, responsibilities, power, and duties of members;
(4) Term limitations, removal and filling of vacancies;
(5) Attendance policy;
(6) Prohibition on staff serving as voting members of the governing authority;
(7) Establishment of a quorum; and
(8) Conflict of interest agreement.

(c) Compliance with 75:15-15-1 shall be determined by:
(1) Documents of incorporation or registration as a business entity or documentation from the appropriate Tribal Council;
(2) Review of the written by-laws; and
(3) Review of the governing authority's minutes.

75:15-15-3. Duties of the governing authority

(a) The duties of the governing authority shall include, but are not limited to:
(1) Approving all policies for the operation of the agency, and ensuring procedures for the implementation of policies are in place and enforced;
(2) Ensuring the agency operates in compliance with established agency policy, applicable state and federal law and administrative rules;
(3) Compliance with the by-laws of the governing authority;
(4) Ensuring all financial transactions and events requiring the approval of the governing authority are reviewed and authorized by the governing authority prior to any commitment by agency personnel;
(5) The selection, annual evaluation and continuance of retention of the executive director;
(6) Review and approve all contractual agreements;
(7) Review the program audit and certification reports from the VSU and approve any plans of correction; and
(8) Oversee the financial administration of the program, including review and approval of financial audits.

(b) Compliance with 75:15-15-3 shall be determined by a review of:
(1) By-laws and minutes of the meetings of the governing authority;
(2) Posted or otherwise distributed written materials regarding decisions and other notifications of the governing authority;
(3) Personnel meeting minutes of the program and its various divisions or geographical locations where applicable; and

(4) Written evaluation and any other documentation regarding the retention or selection or hiring of the executive director.

75:15-15-4. Governing authority, meeting minutes

(a) Minutes of the governing authority shall be kept in written form; reviewed at the next following meeting; corrected if such is approved; and signed by the presiding or authorized officer or chairperson.

(b) Meeting minutes shall include, but are not limited to, recording of:

(1) The date, time and place of the meeting;
(2) Names of those members attending;
(3) Whether, or not, the meeting was convened; and if not why;
(4) Approval of minutes from past meeting;
(5) Topics and issues discussed, and decisions reached;
(6) Recording of motions and of votes on the motion; and
(7) Time of adjournment.

(c) Compliance with 75:15-15-4 shall be determined by the review of the meeting minutes of the governing authority.

75:15-15-5. Governing authority, orientation

(a) A certified program shall provide a minimum of 2 hours orientation training to members of the governing authority which includes, but is not limited to:

(1) Program goals and services of each service component;
(2) Program policies and procedures;
(3) Underlying philosophy [OAC 75:15-1-1.1];
(4) Confidentiality, to include verbal confidentiality, whether inside or outside of the facility and client records;
(5) Client rights and grievance procedure;
(6) Legal and ethical issues;
(7) Overview of domestic violence, sexual assault and stalking;
(8) Open Meeting Act and recording of meeting minutes;
(9) Open Records Act;
(10) Rules, including standards and criteria to ensure multi-cultural needs of clients are met, used in certifying programs;
(11) Role and responsibility of the executive director; and
(12) Role and responsibility of the governing authority.

(b) Orientation training shall take place within 90 days of election to the governing authority.

(c) Members of the governing authority providing volunteer direct or indirect services to clients shall receive the prescribed orientation and training required for program personnel in addition to the orientation set forth in this Section.

(d) Compliance with 75:15-15-5 shall be determined by a review of written policies and procedures, training materials, training records, and minutes of meetings.

SUBCHAPTER 17. CLIENTS RIGHTS

75:15-17-1. Applicability

This Part is applicable to those domestic violence, sexual assault and stalking programs and shelters certified by the OAG pursuant to 74 O.S. § 18p-1 et seq.

75:15-17-3. Client Rights

(a) Each client shall be afforded all constitutional and statutory rights of all citizens of the State of Oklahoma and the United States, unless abridged through due process of law by a court of competent jurisdiction. Each program shall ensure each client has the rights which are listed below:

(1) Each client has the right to be treated with respect and dignity. This shall be construed to protect and promote human dignity and respect for individual dignity;
(2) Each client has the right to a safe, sanitary, and humane living environment;

Roles and Responsiblities of the Executive Director

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.

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.

Role of the Tripartite Board

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

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

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

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

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

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

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

Key Board Responsibilities

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

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

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

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

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

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

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

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

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

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

CSBG IM #82 Tripartite Boards

Published: June 12, 2012

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

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

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

SUBJECT: Tripartite Boards

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

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

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

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

Questions and Responses

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

Question* 1 - *What does the law require?

Roles and Responsibilities o/Tripartite Boards

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

Board Composition

•Low-Income Individuals and Families

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

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

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

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

•Elected Officials or Their Representatives

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

• Major Groups and Interests in the Community Served

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

Question 2 - Who appoints members to a tripartite board?

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

Question 3 - Are term limits permissible?

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

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

Representatives of Low-Income Individuals and Families

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

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

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

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

Elected Public Officials or their Representatives

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

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

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

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

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

Representatives of Major Groups and Interests in the Community

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

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

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

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

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

Development

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

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

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

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

Planning

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

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

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

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

Implementation

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

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

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

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

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

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

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

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

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

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

Evaluation

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

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

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

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

• Fiduciary Responsibilities

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

• Agency Leadership - Board Roles and Responsibilities

Results Oriented Management

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

Results Oriented Accountability

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

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

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

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

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

• Have a clear, written policy

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

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

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

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

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

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

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

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

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

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

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

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

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

• Boards Establish Policy, Executive Directors Execute Policy

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

• Boards Set Agency Mission, Executive Directors Accomplish Agency Mission

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

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

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

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

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

• Boards Supervise Directly Only One Employee - the Executive Director

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

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

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

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

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

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

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

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

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

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

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

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

Elliot Pagliaccio
Vice President
The Rensselaerville Institute
690 Saratoga Road, PMB 130
Burnt Hills, NY 12027-9402
Phone: (518) 399-0216
E-Mail: **epagliaccio@Rinstitute.org**

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

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

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

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

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

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

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

LIFT
Community Action Agency, Inc.

Rebecca Reynolds, Executive Director
David Hawkins, Board Chairman

RESOLUTION

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

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

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

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

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

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

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

Adopted and approved on this 14th day of January, 2025, in a regular meeting of the Board of Directors of LIFT Community Action Agency, Inc.

_____

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

LIFT
Community Action Agency, Inc.

Rebecca Reynolds, Executive Director
David Hawkins, Board Chairman

Equal Employment Officer

Jeannie McMillin is the appointed part-time Equal Employment Opportunity Officer for LIFT Community Action Agency, Inc. Jeannie McMillin's office is located at 511 West Jackson, Hugo, OK 74743. Employees may contact Ms. McMillin via telephone at: 580-326-8176. If she is not available, leave a voice message and she will contact you as soon as possible concerning any questions or complaints.

In her role as the Equal Employment Opportunity Officer, Ms. McMillin is granted the necessary authority to carry out the following activities:

1. To receive and attempt to resolve equal opportunity complaints on an informal basis.
2. To provide aggrieved individuals with information and advice on Equal Opportunities procedures.
3. To take any other steps which may assist in the resolution of the problem prior to filing a formal complaint.
4. To assist in preparing formal complaints.

Jeannie McMillin was first appointed to this role on February 14, 2012. LIFT seeks to re-appoint Ms. McMillin as the part-time Equal Employment Opportunity Officer upon vote and approval by LIFT Community Action Agency, Inc. Board of Directors during their regularly scheduled meeting on January 14, 2025.

_____ _____

David Hawkins, Chairman
LIFT Board of Directors

Date of Board Approval

LIFT
Community Action Agency, Inc.

Rebecca Reynolds, Executive Director
David Hawkins, Board Chairman

EQUAL OPPORTUNITY POLICY STATEMENT

It is the policy of this agency that no applicant, client, and/or employee of LIFT Community Action Agency, Inc., shall on the basis of race, color, national origin, religion, sex (including pregnancy and sexual harassment), age (40 or older), disability, political affiliation, protected veteran status, genetic information & testing. sexual orientation, gender identity, Family Medical Leave, participation in protected activity, or any other characteristic protected by law, be excluded from participation in or be denied the benefits of, or otherwise be subjected to discrimination under any program or activity which LIFT Community Action Agency operates or is applying for funding.

No person with responsibilities in the operation or administration of a program receiving federal financial assistance will discriminate with respect to any such program or activity because of race, color, national origin, religion, sex (including pregnancy and sexual harassment), age (40 or older), disability, political affiliation, protected veteran status, genetic information & testing, sexual orientation, gender identity, Family Medical Leave, participation in protected activity, or any other characteristic protected by law.

It is the agency's equal employment opportunity policy to maintain a work environment free of sexual harassment and intimidation. The agency is committed to comply with both the letter and the spirit of applicable state and federal laws which address equal employment opportunity.

LIFT Community Action Agency will not (1) deny an individual any service, financial aid, or other benefit provided under the programs of this agency; (2) provide any service, financial aid, or other benefit which is different from others provided under the program; (3) subject an individual to segregation or separate treatment in any manner related to his/her receipt of any service, financial aid, or other benefit; (4) restrict an individual in any way in the enjoyment of any privilege enjoyed by others; (5) treat an individual differently from others in determining whether he/she satisfies any admission, enrollment, quota, eligibility, membership, or any other requirement or condition an individual must meet in order to be provided the services they seek; (6) deny any individual an opportunity to participate in any programs that are different from that afforded others in the agency, including the opportunity to participate as an employee or; (7) deny any person the opportunity to participate as a member of a planning or advisory body which is an integral part of any program in this Agency.

In keeping with our policy and mission statement concerning advocacy and institutional change, it is our policy that agency staff shall actively advocate for low-income people in the area of civil rights.

LIFT
Community Action Agency, Inc.

Rebecca Reynolds, Executive Director
David Hawkins, Board Chairman

Responsible officials that fail to adhere to this policy will be subject to immediate disciplinary action by LIFT. Further, LIFT Community Action Agency, Inc. expects that staff members at each level are to make every reasonable effort to assure that equal opportunity is available to applicants, employees, and clients. Staff members are expected to demonstrate sensitivity and respect for all employees and clients, as individuals of worth and dignity and to demonstrate the agency's commitment to equal employment opportunity objectives. It is expected that all program directors and supervisors become familiar with and have direct input into the development of the goals and timetables of the agency's Affirmative Action Plan. Each program director and supervisor will be held accountable for ensuring equality of opportunity within each program, while fostering employment and program participation practices, which are compatible with the agency's Affirmative Action Program and civil rights regulations.

The Board of Directors of the LIFT Community Action Agency, Inc. supports the elimination of all vestiges of debilitation effects of discrimination. Jeannie McMillin has been delegated to serve as the part-time Equal Employment Opportunity Officer for the agency. Ms. McMillin's office address is 511 West Jackson, Hugo, OK 74743. Her telephone number is (580) 326-8176. She is available to any employee having questions or needing assistance in regards to Affirmative Action or Equal Employment Opportunity.

_____
Date of Board Approval

_____
David Hawkins, Chairman
LIFT Community Action Agency, Inc.

LIFT Head Start/Early Head Start/Early Head Start-Child Care Programs
Cost Allocation Justification

Head Start

Classrooms:		Number of Children: 234
Antlers	Fort Towson	Idabel I
Boswell I	Horace Mann I	Idabel II
Boswell II	Horace Mann II	Idabel III
Broken Bow	Horace Mann III	Rattan
Forest Grove I	Hugo II	Soper I
Forest Grove II	Hugo IV	Soper II
Total HS Equivalent Classrooms:		**18**
		47.37%

Early Head Start

Centers:	Number of Classrooms:	Number of Children:
Antlers	3	24
Hugo	2	12
Idabel	2	12
Total EHS Classrooms:	**7**	**48**
	18.42%	

EHS-Child Care

Centers:	Number of Classrooms:	Number of Children:
Antlers ELC	1	8
Broken Bow ELC	1	8
Hugo ELC	1	8
Idabel ELC	2	16
Cabbage Patch Daycare	3	24
The Learning Tree	5	40
Total EHS-CC	**13**	**104**
Equivalent Classrooms:	34.21%	

Total Classrooms: **38**

Head Start Classrooms:

Antlers	Fort Towson	Idabel I
Boswell I	Horace Mann I	Idabel II
Boswell II	Horace Mann II	Idabel III
Broken Bow	Horace Mann III	Rattan
Forest Grove I	Hugo II	Soper I
Forest Grove II	Hugo IV	Soper II
Total HS Equivalent Classrooms:		**18**
		72.00%

Early Head Start Centers:

Center:	Number of Classrooms:
Antlers	3
Hugo	2
Idabel	2
Total EHS Classrooms:	**7**
	28.00%

Total Classrooms: **25**

# of Children (HS/EHS/EHS-CC):		
HS	234	60.62%
EHS	48	12.44%
EHS-CC	104	26.94%
	386	100.00%

# of Children (HS/EHS):		
HS	234	82.98%
EHS	48	17.02%
	282	100.00%

LIFT HEAD START/EARLY HEAD START/EARLY HEAD START-CHILD CARE PROGRAMS
MANAGEMENT TEAM SALARY COST ALLOCATION PLAN

Position	Employee Name	Allocation Methodology/Basis
HS/EHS/EHS-CC Director	Darla Galyon	# of Classrooms
Assistant Director	Jordan Mack	# of Children
Assistant Director	Mattie McKee	# of Children
Health Specialist	Tori Williams	# of Children
Assistant Health Specialist	Ronda Spear	# of Children
Early Childhood Development & Curriculum Coach	Susie Mashburn	# of Teaching Staff
Assistant EC Dev. & Curr. Coach	Sommer Springfield	# of Teaching Staff
Nutrition Specialist	Lauren Barger	# of Children
Assistant Nutrition Specialist	Johonna House	# of Children
Professional Development Specialist	Sara Moore	# of Teaching Staff
Disabilities/Mental Health Specialist	Ashley Stinson	Proj. # of Children with IEPs
Family & Community Eng. Specialist	Christina Merritt	# of Family Advocates
Asst. Disabilities & Mental Health/ Family & Community Eng. Specialist	Lisa Gamblin	# of Children
ERSEA Specialist	Brittany Bailey	# of Children
Assistant ERSEA Specialist	Brianna Nelson	# of Children
Outreach Specialist	Ashley Gaddy	# of Classrooms
Program Secretary	Lori Henry	# of Classrooms
Program Clerk	VACANT	# of Children
Procurement Clerk II	Paige Smith	# of Children
Procurement Clerk I	Grasiela Starlin	# of Children
Maintenance Technician	Ken McDaniel	# of Classrooms
Maintenance Technician	Gary Teague, Jr.	# of Classrooms

HS/EHS/EHS-CC

Program:	# of Children:	%:
Head Start	234	60.62%
EHS	48	12.44%
EHS-CC	104	26.94%
Total:	386	

HS/EHS/EHS-CC

Program:	Projected # of Children with IEPs:	%:
Head Start	39	70.91%
EHS	5	9.09%
EHS-CC	11	20.00%
Total:	55	

HS/EHS/EHS-CC

Program:	# of Teaching Staff:	%:
Head Start	23	37.71%
EHS	12	19.67%
EHS-CC	26	42.62%
Total:	61	

HS/EHS/EHS-CC

Program:	# of Classrooms:	%:
Head Start	18	47.37%
EHS	7	18.42%
EHS-CC	13	34.21%
Total:	38	

HS/EHS/EHS-CC

Program:	# of Family Advocates:	%:
Head Start	5	55.56%
EHS	1	11.11%
EHS-CC	3	33.33%
Total:	9	

HS = 5 equivalent (4 FT+2 Site Supervisors/FAs)

LIFT Head Start/Early Head Start/Early Head Start-Child Care Programs
Non-Wage Cost Allocation Plan

Expense:	Head Start/Early Head Start/ Early Head Start-Child Care				Head Start/ Early Head Start	
	Allocation Basis:	Head Start Allocation %:	EHS Allocation %:	EHS-CC Allocation %:	Head Start Allocation %:	EHS Allocation %:
Admin Local Travel	# of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Admin Out of Area Travel	# of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Admin Office Supplies	# of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Fringe Benefits	Same as Wage					
Staff Local Travel	# of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Staff Out of Area Travel	# of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Parent Local Travel	Actual					
Parent Services	Actual					
Child Transportation	Actual					
Repairs	Actual					
Classroom Teaching Materials	Actual or # of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Child Supplies/Health/Safety	Actual or # of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Classroom Supplies	Actual or Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Dues and Periodicals	# of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
T&TA	# of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Teacher Certification	Actual					
Vehicle Insurance	# of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Equipment Maintenance/Gas	# of Classrooms	72.00%	28.00%	Maintenance paid by providers/or actual	72.00%	28.00%
Building Maintenance	Actual					
Building/Child Insurance	Funded Enrollment	82.98%	17.02%	N/A - Paid by Providers	82.98%	17.02%
USDA Support	Actual					
Telephone	# of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Publications/Postage/Adv/Printing	# of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Transition	Actual					
Disabilities Travel	# of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Disabilities Out of Area Travel	# of Classrooms	47.37%	18.42%	34.21%	72.00%	28.00%
Disabilities Supplies	Actual					
Disabilities Services	Actual					
Salaries	Charged to programs based on actual hours					

LIFT Community Action Agency, Inc.



Community Needs Assessment 2025-2027

Choctaw, McCurtain and Pushmataha Counties of Southeast Oklahoma

LIFT Community Action Agency, Inc. Community Needs Assessment Certification

The Board and Executive Director certify that the Community Needs Assessment is current as of January 14, 2025 and has been formally reviewed and accepted by the Board of Directors.

David Hawkins – Board Chairman **Date**

Rebecca Porter – Executive Director **Date**

Board Approved 01/14/2025

Purpose of a Community Needs Assessment: A Community Needs Assessment aims to identify and prioritize the needs and resources within a specific community or group of communities. This process involves collecting data from target populations and analyzing it to understand the underlying causes of poverty and shifts in population demographics. The agency's Board of Directors and leadership use this information to develop effective, results-driven programs that address poverty. The findings are compiled into a report that justifies the need for resources and explains how they are allocated, providing transparency to funders and the public. Additionally, the report serves as a valuable tool to educate the public and community leaders about poverty-related issues.

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LIFT Community Action Agency, Inc.

Agency Overview: LIFT Community Action Agency, Inc., previously known as Little Dixie Community Action Agency, Inc. (LCAA), was established as a nonprofit organization on April 4, 1968. This formation resulted from the merger of three separate Community Action Agencies in Choctaw, Pushmataha, and McCurtain Counties to more effectively address the needs of residents in Southeast Oklahoma. The newly formed agency's Board of Directors created Articles of Incorporation and By-laws, defining a service area spanning over 4,000 square miles.

Throughout its 56-year history, LIFT has been led by five Executive Directors. The agency's first director, Fred Tucker, served for 25 years until his passing in 1993. His dedication to Community Action is commemorated annually through the Fred Tucker Award for Excellence and Longevity, presented by the Oklahoma Association of Community Action Agencies to outstanding employees statewide. Following Mr. Tucker, the agency has continued its legacy under the leadership of subsequent Executive Directors, including:

- Bob Yandell (1993-2005)
- Randall Erwin (2005-2008)
- Brenda Needham (2008-2014)
- Rebecca Porter (2014-present)

Over the years, LIFT has experienced significant growth, continually expanding its programs and services to address the evolving needs of the region, particularly those of its most vulnerable populations. This expansion has led to a budget increase from $607,583 in 1971 to approximately $27.1 million in 2024, reflecting the agency's commitment to providing a broader range of services for low-income families.

In 1970, census data revealed that 63.6% of residents in the tri-county area had incomes below the Office of Equal Opportunity poverty guidelines. By 2022, census data shows that this figure has decreased to 21.6%. This significant reduction in poverty is largely attributed to the agency's implementation of anti-poverty programs. Each year, LCAA programs provide support to approximately 2,000 families and serve around 4,000 individuals within its service area.

Today, LCAA remains dedicated to its mission of addressing poverty by implementing strategies aimed at alleviating its causes and conditions. This report provides an overview of the agency's efforts, along with other community programs and resources available to meet identified needs. Additionally, it offers a comprehensive analysis of the community, including demographic information and a detailed assessment of prioritized needs.

LCAA's administrative office is located in Hugo, Oklahoma, the county seat of Choctaw County. The agency delivers its programs across the tri-county area through multiple locations, staying committed to the mission, vision, and values of Community Action. Many of the original programs, such as emergency services and weatherization, are still in operation today. Additionally, the agency offers a wide range of services, including Head Start, Early Head Start, Transit, Housing, AmeriCorps Seniors Retired and Senior Volunteer Program, and more. Governance is provided by a 27-member tripartite board representing the low-income, public, and private sectors.

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

Community: LCAA's "Community" includes all of Choctaw, McCurtain and Pushmataha counties located in rural Southeast Oklahoma. Collectively, this "community" covers a land area of just over 4,000 square miles. The community served by LCAA and the community assessed are one in the same.

Data Methodology: LCAA conducts a Community Needs Assessment (CNA) every three years. For this report, data collection took place between May 2024 and October 2024. The agency utilized the Oklahoma Standardized Community Needs Assessment Survey to gather resident demographic information and identify community needs. In addition to the survey, LCAA conducted focus group interviews, analyzed customer satisfaction surveys, reviewed data from the U.S. Census and other reliable online sources, and hosted community needs meetings across its service area.

To ensure the surveys accurately represented the overall population, LCAA employed various distribution methods, including paper forms, in-person collection during service visits, email distribution, and dissemination at agency Board meetings. Surveys were also distributed and collected through schools, faith-based organizations, civic groups, and local businesses.

A total of 337 surveys were collected from the following community sectors: Educational Community-12; Faith-based-10; Community-based-13; Government entity-5; Private organization-3; General public (having never received services from the agency)-217; Client of the Agency (could represent low-income or other sectors)-64; Agency Board Members-10; and Agency Volunteers- 3.

Key Findings: 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. Housing, Transportation and Youth Services (and lack thereof) were all attributed in great part to the poor economy in the area.

The availability of safe, decent, and affordable housing is a significant issue across the entire service area, resulting in inflated and unaffordable rental prices. Transportation challenges were also highlighted, primarily due to insufficient staffing and limited awareness of available transportation services. Additionally, a need for youth services was identified, stemming from a lack of resources in the region. Comprehensive data and key findings are provided later in the "Assessment Profile" section of this report.

Prioritized Needs: Prioritized needs were identified by focus groups which included input from agency leadership, front-line staff and Board Members. The prioritized needs are:
1. Housing
2. Transportation
3. Youth Services.

Agency Programs & Services: The description of agency programs and services included in this Community Needs Assessment reflects those available at the time the report was written and approved. Since the assessment is conducted every three years, it is important to note that programs and services may change during this period. Individuals are encouraged to contact agency offices to confirm the availability of programs or services at any given time. If a need arises that the agency cannot address, staff may assist by providing referrals to other community resource providers. Residents are welcome to reach out to any of our offices for assistance.

Community Building & Engagement

AmeriCorps Seniors RSVP: Retired Senior and Volunteer Program (RSVP) is America's largest volunteer network for people age 55 and over. This program allows individuals an opportunity to use the skills and talents they have learned over the years, or develop new ones while serving in a variety of volunteer activities within their community. Service opportunities are available throughout Choctaw, McCurtain and Pushmataha counties.

Child & Adult Care Food Program (CACFP): CACFP provides training and monitoring for child daycare homes. Specialists offer guidance in nutrition and record-keeping. The program operates in 43 counties and is funded by USDA and administered through the Oklahoma State Department of Education. CACFP also offers Daycare Home Providers an incentive to serve nutritious meals through a reimbursement program.

Family Resource Center: Funded as part of the Know and Grow Oklahoma Initiative, LIFT CAA's Family Resource Center serves as a centralized hub for families to access information/referrals, services, resources, and supports. The FRC promotes cross-sector community collaboration to strengthen systems across Choctaw, McCurtain, and Pushmataha Counties in order to mitigate the impact of adversity and support protective factors among families with children under age five. FRC staff provide direct assistance, conduct consultations/screenings, and facilitate or conduct education/training/skill-building sessions with parents and families (individually or group-based), in collaboration with community partners as available.

Second Chance Act Adult Reentry Education, Employment, Treatment and Recovery Program: This program provides pre- and post-release services to inmates and ex-offenders in the tri-county service area. Services provided include case management, cognitive behavioral therapy, counseling, supports linkage/referrals, and other evidence-based programming and services designed to reduce recidivism as well as promote public safety and health. The program works closely with the County Sheriff Offices and Jails to achieve the program goals.

Strong Fathers Programs: Choctaw, McCurtain, Pushmataha Counties: The Strong Fathers Programs of Choctaw, McCurtain, and Pushmataha Counties aim to support fathers in enhancing their parenting skills and fostering positive relationships with their children and co-parents. Each program serves its respective county and provides resources and training to help fathers become more engaged and effective in their roles, to ultimately benefit their families and communities. This initiative is part of a broader effort to promote responsible fatherhood and strengthen family bonds across Oklahoma.

WorkReady Oklahoma-Idabel: LIFT CAA operates a WorkReady Oklahoma Center in Idabel, Oklahoma that helps individuals find and secure employment through free services such as job training, education, job placement assistance, and career coaching. Center staff are dedicated to supporting job seekers at every step, aiming to connect participants with opportunities that lead to stable, well-paying jobs, enhancing their career prospects and overall quality of life.

Economic Development

Intermediary Program: Designated by United States Department of Agriculture/Rural Development, the agency serves as an intermediary to assist certified loan packagers (home loans) in Arkansas, Kansas, Louisiana, Missouri, Nebraska, North Dakota, Oklahoma, South Dakota and Texas. These services ensure loan package accuracy and completeness. Loan packaging fees generate revenue to help further housing opportunities in LCAA's service area.

Lending: LCAA's lending programs provide resources for both residential and commercial lending opportunities. The residential lending products provide alternative lending options to help families achieve their dream of homeownership. LCAA also packages loans for participating lenders (banks) and USDA/Rural Development. LCAA commercial loans provide capital to business entrepreneurs for business startup and/or expansion.

Parks and Tourism: Parks and recreation facilities provide opportunities for physical activity and can help people of all ages lead a more active lifestyle. Each year, approximately 300,000 individuals enjoy fishing, camping and relaxing at one or more of the park facilities operated by LIFT CAA. LCAA manages Clayton Lake State Park; Hugo Lake Park; and Raymond Gary State Park.

Education

Head Start, Early Head Start and Early Head Start-Child Care: Head Start serves 234 youth ages 3 & 4 years within 18 Classrooms; Early Head Start serves 48 children newborn to three years through three EHS centers; Early Head Start-Child Care also serves 104 newborns to 3 years old through collaborations with six daycare providers. Thousands of children have been served collectively by these programs since their inception. Each of these programs provide children with learning activities to help foster and improve their physical, social/emotional and cognitive development, and in doing so, preparing the children for Kindergarten. Several Head Start centers are operated via collaborations with the public schools.

LIFT Early Learning Centers: The Early Learning Centers operate in four locations within the tri-county service area. These centers are all child care partners within the Early Head Start-Child Care Partnership Program, and support working families by providing full-day, full-year services so children from newborn to 3 years old from families with low-incomes have the healthy and enriching early experiences they need to realize their full potential. All centers follow licensing requirements set forth by the Oklahoma Department of Human Services. with 3 rated as a Five Star Facilities and 1 rated as a Four Star Facility.

Health Services

Healthy Start: Healthy Start serves women (pre, peri and postnatal) as well as their children from birth through 18 months. The national goal of Healthy Start is to reduce high infant mortality rates in high risk areas. This initiative further seeks to address issues/causes surrounding low birth weight, preterm birth, maternal mortality and maternal morbidity. The goal of Healthy Start is to assist families with medical care, resources and education needed to promote the wellness of the mother and baby before, during and after the pregnancy. Care Coordinators are housed in four of the six counties to better serve very rural outlying communities. The program also serves fathers and community members of all expectant babies.

Tri-County Opioid Response Project: The Tri-County Opioid Response Project, serving Oklahoma's southeastern Choctaw, Pushmataha, and McCurtain counties, specifically aims to address the systemic needs of the opioid epidemic. Funded through the Health Resources and Services Admiration, the program encourages partnerships with community members and their organizations to build partnerships and plan/implement systemic changes to prevention, treatment, and recovery of individuals affected by this epidemic. Our goal is to create a positive impact on community health and reduce the morbidity and mortality associated with opioid overdose. In addition LIFT CAA is working towards Outpatient Mental Health Treatment Certification through the Oklahoma Department of Mental Health and Substance Abuse Services. The agency has been granted temporary certification—a crucial step in the process of fully establishing a Comprehensive Community Addiction Recovery Center. It is expected that full certification will be achieved in 2025, which will allow for billing of services and sustainability of the center in the future.

Housing and Housing Supportive Services

502 Loan Program: The USDA Rural Development Section 502 Program gives the opportunity to families with very-low to low incomes to purchase/build when a traditional mortgage is not available.

504 Loan/Grants Program: The Section 504 Loan/Grant Program objective is to help very low-income owner occupants of modest single-family homes in rural areas repair their homes. Loan funds are available for home improvement and repairs, to improve safety and sanitation and to remove health and safety hazards. Grants may be available for very low-income elderly.

Purchase/Rehab/Resale: Homebuyers are able to enjoy huge savings by purchasing a home through this program. LCAA purchases homes which have gone through foreclosure at a very reasonable cost. Using in-house construction crews for much of the rehab contributes to additional savings which is passed on to the homebuyer. These homes oftentimes help to address the housing needs of very low to low- and moderate-income families.

Rental Housing: LIFT owns and operates twelve multifamily apartment complexes consisting of 1, 2, and/or 3-bedrooms located within the tri-county service area. The units are affordable and Section 8 and other forms of rental assistance is accepted. In addition, the agency manages three senior supportive housing complexes.

Rural Development Guarantee Program: The USDA Rural Development Guarantee Program works to help families purchase existing homes with moderate income.

Speculative Housing: More than two decades ago, LCAA began building Speculative Housing due to the lack of private development of single-family homes in the service area. The goal of building one home per year is based on the premise or "speculation" that the home will be purchased upon completion. These "spec" homes help to address the housing needs of more moderate-income families. These homes can be financed through a traditional lender.

Technical & Management Assistance: LCAA has held a Technical and Management Assistance (T&MA) contract for Region II with USDA Rural Development since 1980. T&MA employees serve Self-Help Housing grantees throughout Region II which consists of Arkansas, Kansas, Louisiana, Missouri, Nebraska, New Mexico, North Dakota, Oklahoma, South Dakota, Texas and Wyoming.

Weatherization: LCAA's Weatherization Assistance Program reduces energy costs for low-income households by increasing the energy efficiency of their homes through methods such as installation of additional insulation, weather-stripping, caulking and more. The areas served include Atoka, Bryan, Carter, Choctaw, Coal, Johnston, Love, Marshall, McCurtain, Murray, Pontotoc and Pushmataha Counties.

Supportive Services

Emergency Food and Shelter Program: The Emergency Food and Shelter Program (EFSP) is a Federal program administered by the U.S. Department of Homeland Security's Federal Emergency Management Agency (FEMA). LIFT serves low-income families in Choctaw, Pushmataha and McCurtain counties with utility/propane, rental/mortgage and food assistance support through the Emergency Food and Shelter Program.

Rx for Oklahoma: Rx for Oklahoma is a prescription drug program that assists low-income individuals and families with obtaining proscriptions at a reduced or no out of pocket expense. The program is available to those Oklahomans who meet the income guidelines or have no prescription insurance.

Salvation Army: LCAA is the designated service unit for the Salvation Army for the tri-county area. During the holiday season, members throughout the communities volunteer their time to the Red Kettle Campaign and ring the bell to raise money for charitable purposes. The funds raised are used to help families with utility or other emergency needs.

Volunteer Income Tax Assistance: Through grant support from the Internal Revenue Service, LIFT utilizes qualified employees, trained by the IRS to serve under the Volunteer Income Tax Assistance program (VITA). Through this program, employees provide free income tax preparation service to residents in the tri-county area.

Transportation

Local Demand: LIFT Transit is a rural transportation service that provides demand/response transportation services to residents within the city limits of Antlers, Broken Bow, Clayton, Hugo and Idabel. The transit services are operated with both full and part-time drivers. Annual training for all transit employees includes drug and alcohol misuse/abuse, defensive driving, CPR/First Aid and Passenger Assistance and Sensitivity Awareness.

SoonerRide/Older Americans Act Title III funding: SoonerRide is a transportation service provided for eligible Medicaid clients for non-emergency medical trips. Residents in the tri-county service area are transported to and from critical care appointments such as dialysis, cancer and wound care treatment. Additionally, funding received from the Kiamichi Economic Development District of Oklahoman's Area Agency on Aging Division help to fill a gap in transportation services for older Americans (60 years of age or older) who do not qualify for Medicaid, Tribal, or other free transportation services.

Victim & Youth Services

Better Choices: Better Futures: This project works to develop coordinated intervention and prevention responses that identify and address challenges related to opioid and substance misuse that impact youth, families, and communities within Choctaw, McCurtain, and Pushmataha Counties. Strategies include: increasing access to and education over naloxone and available supports; prevention, outreach, and drug take-back programming; and the creation and coordination of an Overdose Fatality Review Team to drive prevention and intervention efforts at local and state levels. Through a case management model, staff also work to enable youth and families impacted by opioids and/or substance use to find, access, and navigate evidence-based, affordable treatments, as well as home- and community-based services and social supports.

Court Appointed Special Advocates: Funded by the Oklahoma District Attorneys Council through VOCA (Victims of Crime Act) funding and Oklahoma CASA Association, this program recruits and trains volunteers to be the voice for children in the child welfare system. A CASA volunteer advocates for children who have been declared by the courts as "deprived", meaning abused, neglected, or abandoned.

Mentoring: LCAA's Mentoring program is funded through the Office of Juvenile Justice and Delinquency Prevention (OJJDP) via Youth Collaboratory which is a national network designed to strengthen outcomes for youth and young adults at risk for delinquency or victimization. Youth are paired with caring adult mentors who serve as role models and provide emotional and academic support.

Safe Place Healing Hearts: This program directly serves victims of sexual assault, domestic violence, dating violence, and stalking crimes; builds the capacity of direct service providers to better serve and protect victims; encourages reporting of these crimes; and ensures all service providers are adequately trained on how to appropriately respond, assist victims, improve the rate of prosecution of such crimes, and work together through coordinated service delivery. SPHH strives to enhance the safety of rural victims of sexual assault, domestic violence, dating violence, and stalking.

Safe Place Healing Hearts Too: Established in 2021, SPHH Too works to develop, expand, and strengthen prevention strategies, intervention services, and treatment targeting children ages 0-10 years who are victims of and/or exposed to domestic violence, dating violence, sexual assault, and stalking in Choctaw, McCurtain, and Pushmataha Counties. This includes direct services to address the emotional, cognitive, and physical effects of trauma on child victims. The program also supports the coordinated community response, by enhancing collaboration between and building the capacity of service providers in the target counties to appropriately respond to and assist child victims or those exposed to domestic violence, dating violence, sexual assault, and stalking. The program develops and delivers community training and educational/prevention programming as well.

Victim Advocacy Services: Victim Advocacy Services: This program provides enhanced, needed direct services to all types of victims and their families. Strategies involve working with law enforcement, volunteers, caseworkers and other stakeholders in a coordinated effort to meet the needs of crime victims. Established in 2015, the program assists victims of crime through direct service provision and/or linkages to resources that will serve the victim's physical, emotional and basic needs, (e.g. emergency shelter, food and clothing), as well as meeting long-term needs (e.g. assistance in applying for crime victim compensation benefits).

YouthBuild: The YouthBuild program for individuals age 16-24 combines academics with career training, leadership development, and community service at no cost to the students. Participants work toward obtaining their GED or high school diploma, learn marketable job skills, leadership skills and will serve their communities by assisting in the construction of affordable housing.

Community Demographics:

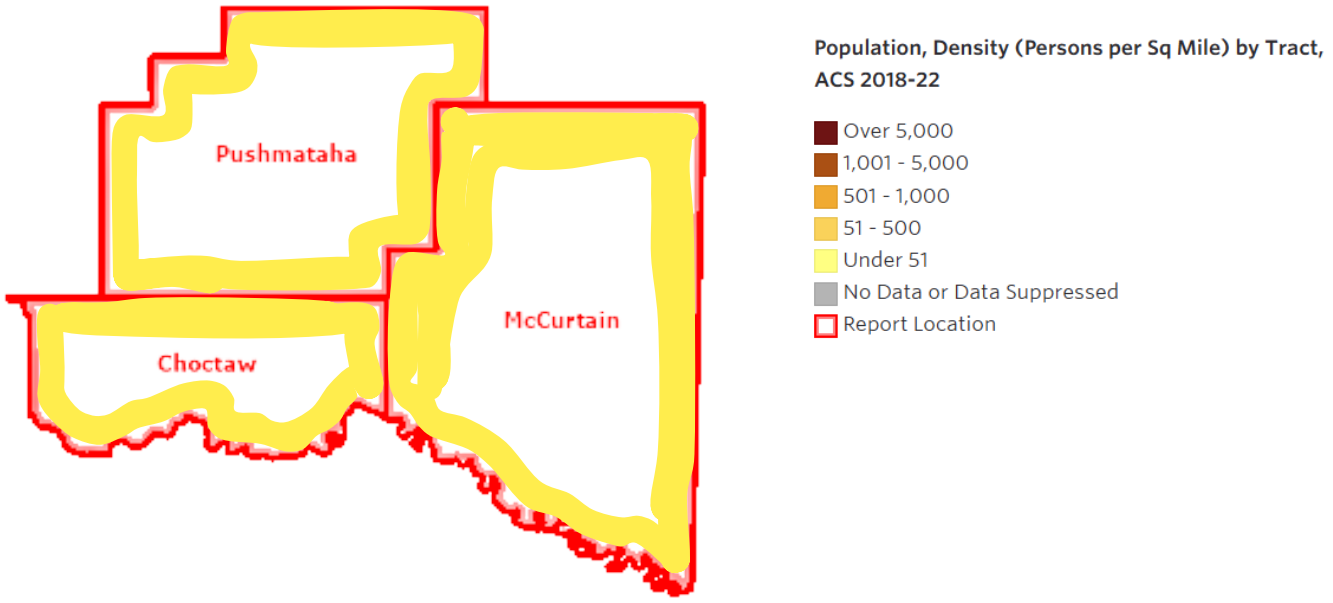
LCAA's service area includes three rural counties in Southeast Oklahoma: Choctaw, McCurtain and Pushmataha counties.

General Overall Population Demographic profile: Total Population

A total of 56,133 people live in the 4,016.70 square mile report area defined for this assessment according to the U.S. Census Bureau American Community Survey 5-year estimates (2018-22 data).

Report Area	Total Population	Total Land Area (Square Miles)	Population Density (Per Square Mile)
Report Location	56,133	4,016.70	14
Choctaw County, OK	14,285	770.38	19
McCurtain County, OK	31,003	1,850.78	17
Pushmataha County, OK	10,845	1,395.54	8
Oklahoma	3,970,497	68,596.72	58
United States	331,097,593	3,533,269.34	94

Data Source: US Census Bureau, American Community Survey. 2018-22. → *Show more details*



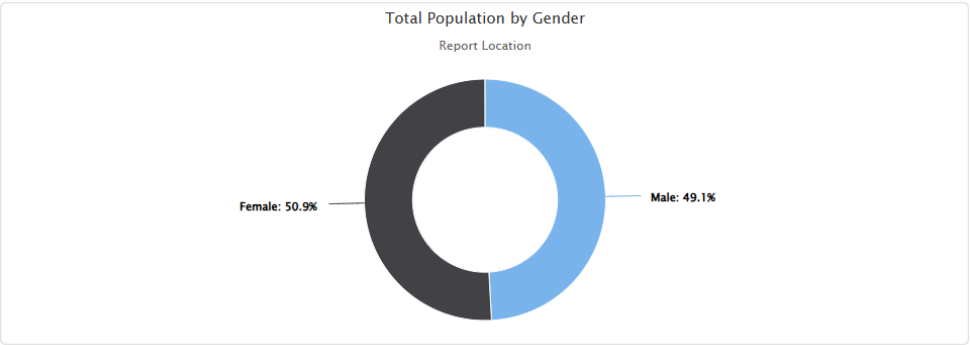
Total Population by Gender Report Area: Choctaw County, OK, McCurtain County, OK, Pushmataha County, OK.

Total Population by Gender

This indicator reports the total population of the report area by gender.
The percentage values could be interpreted as, for example, *"Among the total report area population, the percentage of population that is male is (value)."*

Report Area	Male	Female	Male, Percent	Female, Percent
Report Location	27,588	28,545	49.15%	50.85%
Choctaw County, OK	6,910	7,375	48.37%	51.63%
McCurtain County, OK	15,366	15,637	49.56%	50.44%
Pushmataha County, OK	5,312	5,533	48.98%	51.02%
Oklahoma	1,980,478	1,990,019	49.88%	50.12%
United States	164,200,298	166,897,295	49.59%	50.41%

Data Source: US Census Bureau, American Community Survey. 2018-22. ➞ *Show more details*

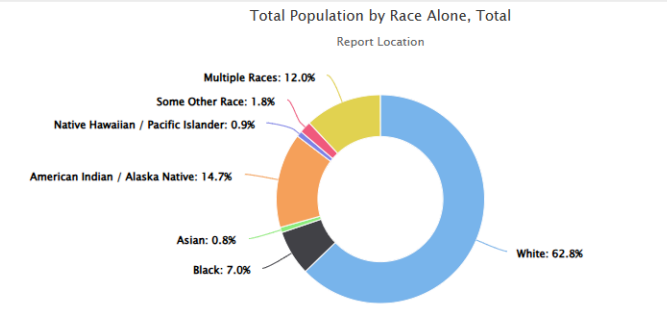


Total Population by Race Alone:

This indicator reports the total population of the report area by race alone.

Report Area	White	Black	Asian	American Indian / Alaska Native	Native Hawaiian / Pacific Islander	Some Other Race	Multiple Races
Report Location	35,256	3,937	453	8,257	492	1,028	6,710
Choctaw County, OK	8,633	1,390	99	2,194	13	221	1,735
McCurtain County, OK	18,987	2,422	307	4,383	455	763	3,686
Pushmataha County, OK	7,636	125	47	1,680	24	44	1,289
Oklahoma	2,716,667	284,453	91,720	298,628	7,313	124,427	447,289
United States	218,123,424	41,288,572	19,112,979	2,786,431	624,863	20,018,544	29,142,780

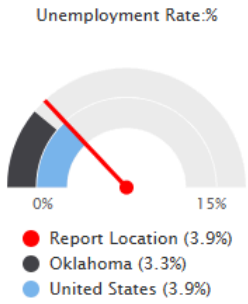
Data Source: US Census Bureau, American Community Survey. 2018-22. ➞ *Show more details*



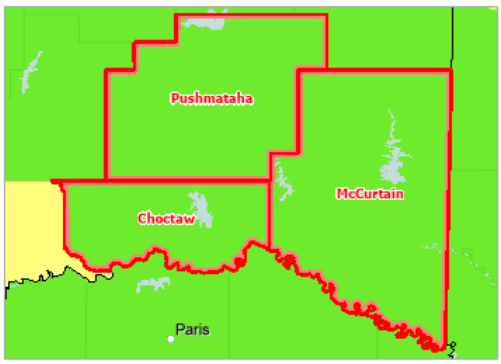
Unemployment Statistics in Oklahoma: Source: United States Department of Labor/Bureau of Labor Statistics. Average weekly wages in Oklahoma's smaller counties:

Total unemployment in the report area for the current month (September 2024) equals 1,131, or 3.9% of the civilian non-institutionalized population age 16 and older (non-seasonally adjusted). This indicator is relevant because unemployment creates financial instability and barriers to access including insurance coverage, health services, healthy food, and other necessities that contribute to poor health status.

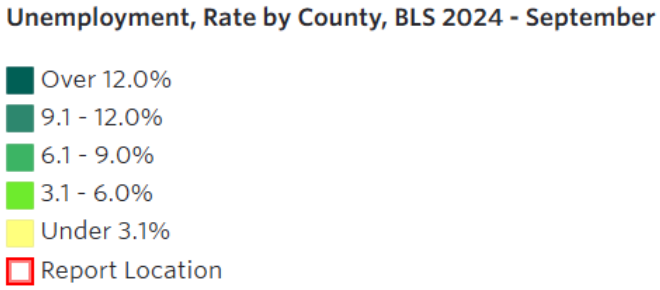
Report Area	Labor Force	Number Employed	Number Unemployed	Unemployment Rate
Report Location	28,796	27,665	1,131	3.9%
Choctaw County, OK	7,379	7,117	262	3.6%
McCurtain County, OK	16,583	15,935	648	3.9%
Pushmataha County, OK	4,834	4,613	221	4.6%
Oklahoma	2,006,690	1,940,640	66,050	3.3%
United States	169,777,533	163,187,465	6,590,069	3.9%

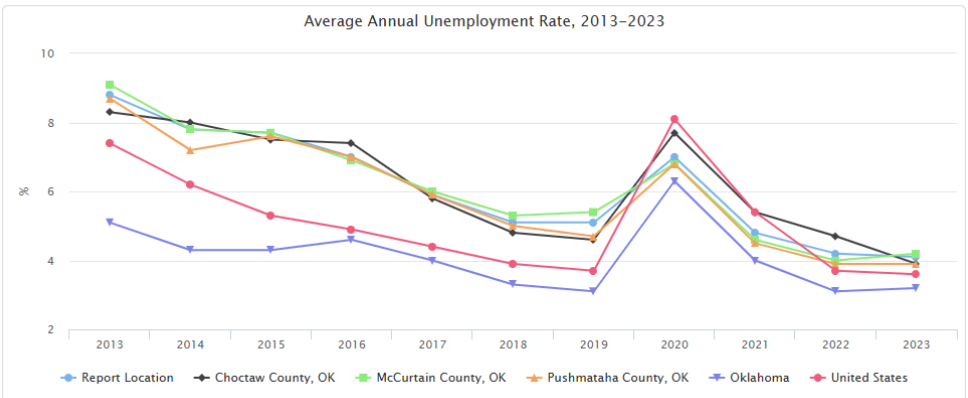


Note: This indicator is compared to the state average.
Data Source: US Department of Labor, Bureau of Labor Statistics. 2024 - September. → *Show more details*



View larger map





Poverty Profile:

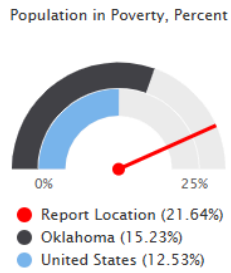
Report Area: Choctaw County, OK, McCurtain County, OK. , Pushmataha County, OK.

Poverty - Population Below 100% Federal Poverty Level

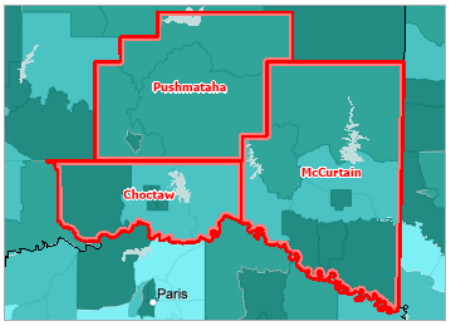
Poverty is considered a key driver of health status.

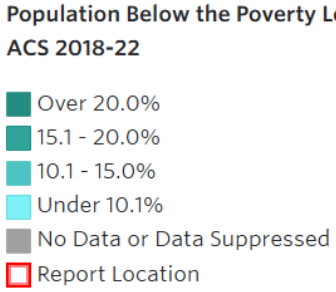
Within the report area 21.64% or 11,969 individuals for whom poverty status is determined are living in households with income below the Federal Poverty Level (FPL). This indicator is relevant because poverty creates barriers to access including health services, healthy food, and other necessities that contribute to poor health status.

Report Area	Total Population	Population in Poverty	Population in Poverty, Percent
Report Location	55,300	11,969	21.64%
Choctaw County, OK	14,030	3,195	22.77%
McCurtain County, OK	30,611	6,460	21.10%
Pushmataha County, OK	10,659	2,314	21.71%
Oklahoma	3,847,702	585,991	15.23%
United States	323,275,448	40,521,584	12.53%



Note: This indicator is compared to the state average.
Data Source: US Census Bureau, American Community Survey. 2018-22. → *Show more details*





Poverty Demographics by Race

Report Area: Choctaw County, OK. McCurtain County, OK. & Pushmataha County, OK.

This indicator reports the percentage of population in poverty in the report area by race alone.

Report Area	White	Black or African American	American Indian or Alaska Native	Asian	Native Hawaiian or Pacific Islander	Some Other Race	Multiple Race
Report Location	18.81%	44.85%	20.23%	2.21%	17.28%	36.42%	24.30%
Choctaw County, OK	20.45%	43.96%	16.51%	9.09%	0.00%	63.76%	21.16%
McCurtain County, OK	17.22%	46.30%	21.83%	0.00%	18.68%	29.99%	24.10%
Pushmataha County, OK	20.93%	20.65%	20.93%	2.13%	0.00%	0.00%	29.07%
Oklahoma	12.81%	25.82%	19.24%	14.93%	31.11%	22.35%	18.54%
United States	10.09%	21.46%	22.60%	10.12%	16.97%	18.57%	14.76%

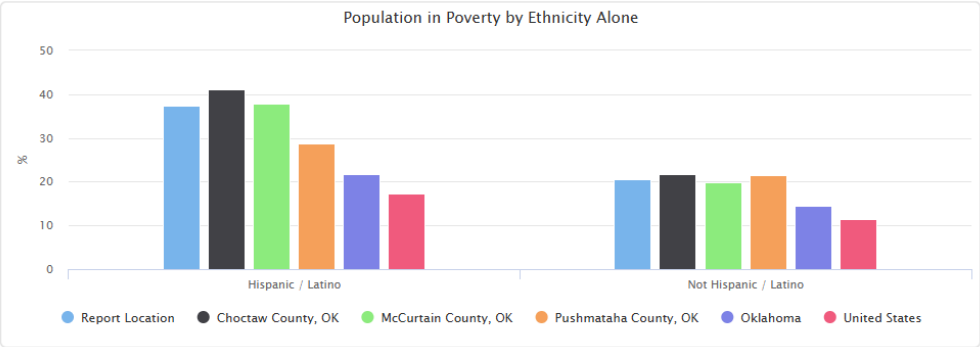
Data Source: US Census Bureau, American Community Survey. 2018-22. → *Show more details*

Poverty Demographics by Ethnicity

This indicator reports the population in poverty in the report area by ethnicity alone.

Report Area	Hispanic or Latino	Not Hispanic or Latino	Hispanic or Latino, Percent	Not Hispanic or Latino, Percent
Report Location	1,208	10,761	37.42%	20.67%
Choctaw County, OK	310	2,885	41.11%	21.73%
McCurtain County, OK	772	5,688	37.90%	19.91%
Pushmataha County, OK	126	2,188	28.83%	21.40%
Oklahoma	97,203	488,788	21.76%	14.37%
United States	10,447,540	30,074,044	17.24%	11.45%

Data Source: US Census Bureau, American Community Survey. 2018-22. → *Show more details*



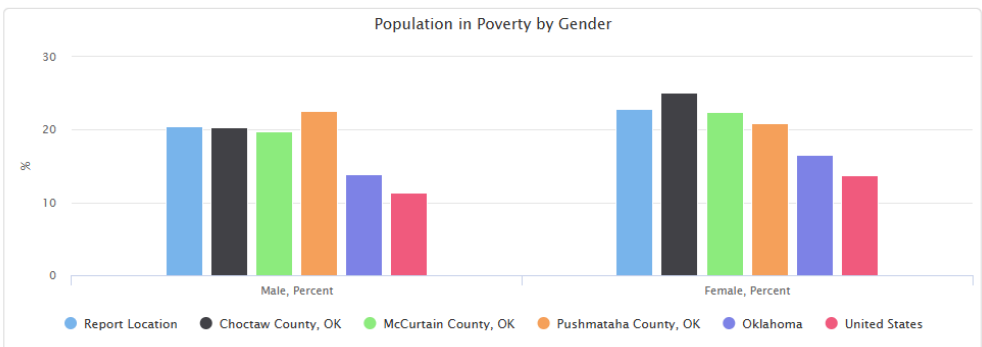
Poverty Demographics by Gender

Report Area: Choctaw County, OK; McCurtain County, OK; Pushmataha County, OK

This indicator reports the population in poverty in the report area by gender.

Report Area	Male	Female	Male, Percent	Female, Percent
Report Location	5,545	6,424	20.45%	22.79%
Choctaw County, OK	1,377	1,818	20.31%	25.07%
McCurtain County, OK	2,985	3,475	19.77%	22.40%
Pushmataha County, OK	1,183	1,131	22.61%	20.84%
Oklahoma	265,426	320,565	13.93%	16.50%
United States	18,109,332	22,412,252	11.34%	13.70%

Data Source: US Census Bureau, American Community Survey. 2018-22. → *Show more details*



Trends: The last Community Needs Assessment conducted by LIFT Community Action Agency, Inc. for the same report area was completed in 2022. At that time, the report area had a population of 58,951 (US Census ACS 2015-2019 estimates). Since then, the population has decreased by 2,818 individuals (US Census ACS 2018-2022 estimates) with a current population of 56,133. In comparison, the population change between 2000 and 2010 for the same report (geographical) area showed a decrease of 1,483 persons. Considering the significant difference in the timeframe-- 4 years (2015-2019) vs. 10 years (2000-2010)-- this would indicate that the population is rapidly declining.

Poverty rates have actually declined in Choctaw County from 27.1% in 2015 to 28.5% in 2018 to 22.5% in 2019 to 21.6% in 2022. This supports the communities identified and prioritized needs for economic development.

McCurtain County has seen a slight decrease in poverty since the last needs assessment going from 26.1% in 2015 to 23.65% in 2018 to 21.9% in 2019 to 21.10% in 2022. Data derived at the local level (community needs meetings) attributes this decline to the recent "boom" in tourism development in McCurtain County. According to area residents, tourism activities are drawing tourists from the Dallas-Fort Worth Metropolitan area as well as from Arkansas and many other urban areas. The influx of tourists has led to an increase in small business development, thereby positively impacting the poverty and unemployment rates.

However, residents report that other parts of McCurtain County as well as the contiguous counties of Pushmataha and Choctaw are not experiencing the benefits of this economic development. At this time, the growth and its benefits appear to be concentrated around the areas between Beavers Bend State Park in Broken Bow, Oklahoma and Hochatown, Oklahoma. The development has resulted in significant increases in property values and new single-family residential development is no longer affordable. Therefore, affordable housing is becoming a growing concern in this county.

During the last C.N.A poverty rates in Pushmataha County were showing the most significant decrease going from 26.5% in 2015 to 21.9% in 2018. Since the assessment conducted in 2021, poverty in Pushmataha County has showed a decrease from 23.9% to 21.7% .

Unemployment rates in the report area also have significantly declined since the 2022-2024 C.N.A report. The Choctaw County unemployment rate decreased from 4.1% in 2022 to 3.9% in 2024. Pushmataha County unemployment rate increased from 2.9% in 2022 to 4.6% in 2024. In line with the growth and new jobs created in McCurtain County, there is a trend of reduced unemployment in that county. In 2015, McCurtain County had an unemployment rate of 7.8%, which dropped to 3.3% in 2022. They has been a slight increase in 2024 now being 3.9%.

Assessment Profile:

Methodology and Timeline for conducting Community Needs Assessment

Timeline:

LCAA conducts a Community Needs Assessment (CNA) every three years. This CNA will be effective from the certification date of January 14, 2025, through December 31, 2027. The agency aims to review and update the CNA as needed, at least once a year, through ongoing monitoring, data collection, and analysis. The table below outlines the dates, locations, and times for each assessment activity related to data collection, evaluation, and analysis.

Timeline	Activity
02/01/2024-10/01/2024	Distributed/collected paper standardized surveys
02/01/2024-10/01/2024	Transferred survey responses (337) into the online survey tool required by ODOC to generate an electronic version
10/01/2024-11/01/2024	Focus group responses collected from staff, clients, leadership and board to identify top three Prioritized Needs
12/02/2024-10:00 a.m. Choctaw County 12/04/2024-10:00 a.m. Pushmataha County 12/05/2024-10:00 a.m. McCurtain County	Community Meetings held (two per county) in report area

Data Sources/Sample Size/Sectors/Surveys:

Paper Surveys: LCAA used the Oklahoma Standardized Community Needs Assessment Survey for data collection. Around 20 percent of the returned surveys were completed by households with children enrolled in Early Head Start or Head Start, providing a strong representation of low-income families. Surveys were also completed by Board Members, agency staff, clients or customers applying for or receiving services, community partners, social service providers, coalition representatives, as well as members of the faith-based community and both the private and public sectors.

The table on the following page reflects community needs for the service area and represents the responses to Question 15 from the Community Needs Assessment survey.

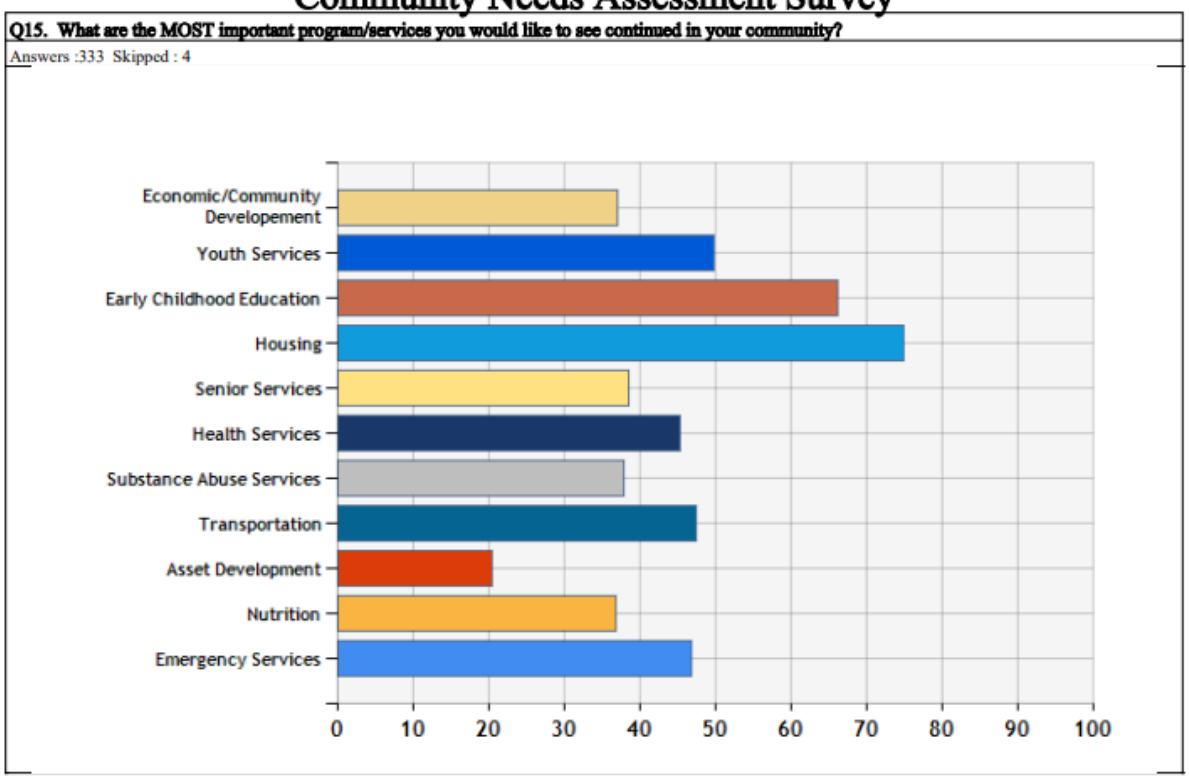
LIFT CAA

Report Date: 11/19/2024

Community Needs Assessment Survey

Q15. What are the MOST important program/services you would like to see continued in your community?

Answers :333 Skipped : 4



The identified needs chart above represents the total responses for the 337 surveys that were collected and represents how individuals ranked the eleven services identified in question 15. Housing, Early Childhood Education, Youth Services, Emergency Services and Transportation were ranked as the top five services residents would like to see continued in the report area, as described below.

1. Safe, decent and affordable housing units are an identified need determined by the community needs survey. This is a family level need.
2. Early Childhood Education to continue provision of preschool services is an identified need determined by the community needs survey. This is a community level need.
3. Youth Services to bring more youth activities to our areas. Is a community level need.
4. 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.
5. Transportation is an identified need determined by the community needs survey. This is a community level need.

Prioritized Needs:

Focus groups consisting of agency leadership, front-line staff and Board Members participated in activities to prioritize the top three community needs. Participants were provided with the top 11 identified needs/services (from the chart above) and were asked to rank the top three in order from 1 to 3, with 1 representing most need and so forth. For each selection, participants were asked to provide qualitative data describing their rationale as to why they chose and ranked the needs as they did. After all responses were collected and tallied, this process resulted in identifying the top three "Prioritized" needs.

The Prioritized Needs in ranked order are:

1. Housing
2. Transportation
3. Youth Services.

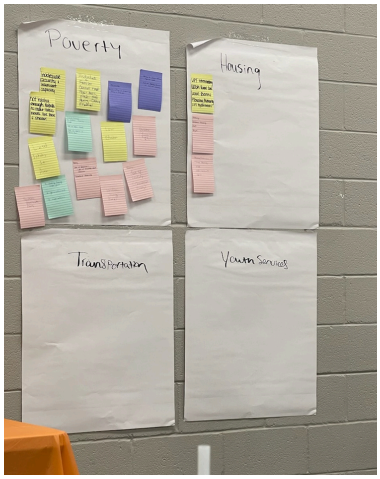
Community Meetings:

Following needs prioritization, LCAA utilized social media, email, flyers, and presentations at public meetings to foster participation in community meetings. During these, participants engaged in activities in order to determine:

1. What is poverty? (Exercises to define poverty)
2. What are the causes and conditions of poverty?
3. Why the community assessed the needs as they did; (Why did the needs that presented as first, second, and third exist?)
4. What current resources existed to address the three prioritized needs?
5. What additional strategies or actions could serve to address these needs within the communities?

Open forum discussion occurred following each exercise. This process was used to determine what the community identified as the leading causes and conditions of poverty; to identify existing resources as well as potential strategies to address the needs.





Prioritized Need 1 – Housing: Decent, safe and affordable housing units (rental and purchase) are a family level need. The agency is currently addressing this need through the provision of rental units including rental units for seniors. The agency also provides numerous other housing and housing supportive services for residents.

The primary cause that housing ranked as the top community need was identified as:

- Community housing is backlogged due to an influx in our population.
- Lack of available housing.
- Rent is too high.

The resulting conditions were:

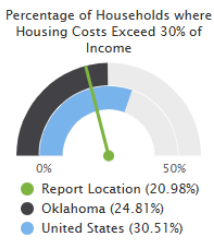
- People living in substandard housing
- Multi-generational of families sharing housing
- Not enough money to live on.

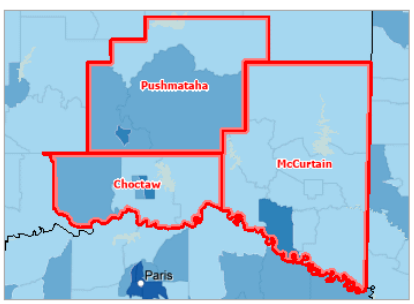
Housing Costs - Cost Burden (30%)

This indicator reports the percentage of the households where housing costs are 30% or more of total household income. This indicator provides information on the cost of monthly housing expenses for owners and renters. The information offers a measure of housing affordability and excessive shelter costs. The data also serve to aid in the development of housing programs to meet the needs of people at different economic levels. Of the 21,301 total households in the report area, 4,470 or 20.98% of the population live in cost burdened households.

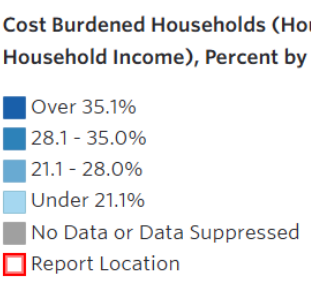
Report Area	Total Households	Cost-Burdened Households	Cost-Burdened Households, Percent
Report Location	21,301	4,470	20.98%
Choctaw County, OK	5,805	1,345	23.17%
McCurtain County, OK	11,267	2,116	18.78%
Pushmataha County, OK	4,229	1,009	23.86%
Oklahoma	1,522,711	377,791	24.81%
United States	125,736,353	38,363,931	30.51%

Note: This indicator is compared to the state average.
Data Source: US Census Bureau, American Community Survey. 2018-22. ➞ *Show more details*





View larger map



Prioritized Need 2 – Transportation: Reliable and accessible transportation is an individual level need. To address this, the agency provides services through the LIFT Transit Program and the KEDDO Program (Kiamichi Economic Development District of Oklahoma).

The lack of accessible and reliable transportation limits opportunities for employment, education, healthcare, and other essential services, disproportionately affecting low-income residents and vulnerable populations. Expanding transportation services, such as rural transit programs, carpooling initiatives, or ride-share options, could alleviate these burdens and improve overall access and mobility in the area.

The primary cause that transportation ranked as the second top community need was identified as:

- Cost of Transportation
- Hours of transportation operation
- Only available in city limits.

The resulting conditions were:

- People living in poverty
- Jobs available may not be an 8-4 job
- Individuals in rural areas are being missed.

This indicator reports the type of transportation available/utilized in the report area by individual.

Label	Choctaw County, Oklahoma	McCurtain County, Oklahoma	Pushmataha County, Oklahoma
	Estimate	Estimate	Estimate
Total:	4,878	13,105	2,999
No vehicle available	157	371	86
1 vehicle available	1,149	3,209	616
2 vehicles available	1,594	4,340	1,169
3 or more vehicles available	1,978	5,185	1,128
Car, truck, or van - drove alone:	3,891	10,928	2,213
No vehicle available	103	215	15
1 vehicle available	854	2,551	403
2 vehicles available	1,353	3,780	915
3 or more vehicles available	1,581	4,382	880
Car, truck, or van - carpooled:	587	1,474	524
No vehicle available	15	76	38
1 vehicle available	190	529	179
2 vehicles available	114	326	141
3 or more vehicles available	268	543	166
Public transportation (excluding taxicab):	12	34	0
No vehicle available	0	16	0
1 vehicle available	9	5	0
2 vehicles available	3	3	0
3 or more vehicles available	0	10	0
Walked:	72	152	33
No vehicle available	18	42	22
1 vehicle available	19	16	6
2 vehicles available	13	58	3
3 or more vehicles available	22	36	2

Note: This indicator is compared to the state average.
Data Source: United States Census Bureau

Prioritized Need 3 – Youth Services: Safe and reliable Youth Service programs/activities is a community level need. To address this need LIFT offers a Mentoring Program. The program's goal is to pair youth with a caring adult mentor to be a positive influence in their lives. The mentor will provide the youth with additional emotional and academic support as well as exposing them to a variety of activities and experiences they may not otherwise encounter.

The primary cause that ranked Youth Services as the top community need was identified as:

- Limited after school programs
- Parents cannot afford youth activities
- Parents cannot get their kids to these activities.

The resulting conditions were:

- Individuals are not qualified to work in these positions
- Low paying jobs
- Transportation availability.

The Oklahoma Department of Mental Health and Substance Abuse Services' Prevention Needs Assessment Survey Report for the 2019-2020 School Year (2021) is a tool used to inform prevention and intervention efforts. The table below measures the percent of 6th grade students in Oklahoma reporting exposure to risk factors during the 2019-2020 School Year.

Risk Factor	Students Reporting Risk (%)
Community	
Low Neighborhood Attachment	51.9
Community Disorganization	40.3
Family	
Poor Family Management	57.3
Family Conflict	38.6
Family History of Antisocial Behavior	37.9
School	
Academic Failure	35.1
Low Commitment to School	60.6
Peer and Individual	
Early Initiation of Antisocial Behavior	24.1
Depressive Symptoms	39.4
Students at High Risk (7 or more risk factors)	41.0

Over a third of 6th grade students (typically 11-12 years of age) reported risk exposure on eight of the nine measures. High reporting for community risk factors suggests a need to explore and enhance community engagement strategies and interventions to promote stability. High family risk factors underscores a critical need for family-focused interventions and support targeting generational patterns. Reported risk under school factors indicates need for supports and school-based programming to foster a positive school environment. Peer and individual risk factors signals the importance of early intervention strategies, especially with mental health and support services.

Causes and Conditions of Poverty in the service area:

The table below is a compilation of primary causes and conditions of poverty present in the Service Area. These were identified by participants during the community needs assessment meetings.

Causes of Poverty	Conditions of Poverty
Lack of employment opportunities	Homelessness
Lack of resources	Child Abuse
Lack of program awareness	Lack of basic needs (shelter, food, healthcare)
Housing costs unaffordable	High infant mortality rates
Prison records/no hope	Poor Nutrition/Poor health outcomes
Not enough income/low wages	Crime
Geographical area	Poor Self Esteem
Debt burden	Reliance on Government assistance
Drug and/or Alcohol abuse	Child neglect
Lack of education	Unsanitary Housing Conditions
Lack of job skills	Poorly Educated
Lacking basic life skills	Domestic Abuse
Generational cycle (it is what people know)	Unemployed
No transportation	Mentally unstable
Laziness/No motivation	Broken families
Lack of infrastructure to attract business	Substance Abuse
Bad health	Hunger
Low paying jobs	Substandard housing

Existing Community Resources by Prioritized Need Choctaw, McCurtain and Pushmataha Counties

Housing	Transportation	Youth Services
Local Banks	LIFT Transit	LIFT CAA
LIFT Apartments	Manage Care Organization	Choctaw Nation Youth Advisory Board
Public Housing Authority	Choctaw Nation (Tribal Members only)	Boys and Girls Club
502 Program	Friends	Youth Advisory Board
Guaranteed Loan Program	Privately owned vehicles	Student Council
Choctaw Nation of Oklahoma	Veterans	Church Camps
Private Owned Rent Homes	Sooner Ride	After School Activities
LIFT Spec Housing		Choctaw County Youth Services
Housing Urban Development/Section 8 Rental		YouthBuild
Southeast Oklahoma Community Development Corporation		Project Gain
Emergency Shelter Program		Youth Sports Leagues
Chamber of Commerce		JAG Program
Oklahoma Property Management		

Agency Data: The table below provides a list of the top three services identified by the community. Detailed descriptions of these are included in the "Agency Programs and Services" section of this report. The data in the table below was populated from CAPTAIN reports and are current as of December 2024.

Services	Outcomes	Client Demographics (Counts)
Housing	Obtained/Maintained Safe and Affordable housing	151
	Obtained WX Assistance (Non-Emergency)	65
Transportation	Transportation (rides) provided	71,387 rides
Youth Services	Youth received services	97

Data over the agency and services provided is further explained in the "Agency Programs and Services" section of this report. On average, LCAA serves 2,000 clients each year with most of those being served through Head Start and other Early Childhood programs. Transportation is another large program operated by the agency. CAPTAIN allows for tracking miles and trips, but not individuals for this service. The typical client of the agency is a single parent household, primarily female, with incomes significantly below federal poverty guidelines.

Sources:

Sources have been identified and many are cited throughout the report.

· Oklahoma Standardized Community Needs Assessment Survey
· Focus Group Activities
· Community Meetings
· Customer Satisfaction Data
· Agency Data (from CAPTAIN reports, Annual Reports, staff and Board Members)
· Census Data (American Community Survey and American Factfinder)
· Community Commons
· U.S. Department of Labor/Bureau of Labor Statistics
· Oklahoma Department of Commerce
· Internet Research
· Oklahoma Department of Mental Health and Substance Abuse Services
· U.S. Department of Housing and Urban Development
· National Institute on Health/National Institute on Drug Abuse

Appendices: (See attached)

· Oklahoma Standardized Community Needs Assessment Survey
· Forum Questions
· Customer Satisfaction Survey

LIFT Community Action Agency, Inc.
209 North 4th
Hugo, OK, 74745
www.littledixie.org

Community Needs Assessment Survey

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

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

Check the response that best represents you.

4. What is your gender?

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

5. What is your ethnicity?

☐Hispanic ☐Non-Hispanic

6. What is your race?

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

7. What is your highest level of education completed?

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

8. What best describes your household?

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

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

_____0-2 _____3-4 _____5-9 _____10-14
_____15-17 _____18-19 _____20-24 _____25-34
_____35-44 _____45-54 _____55-59 _____60-64
_____65-74 _____75-84 _____85 and older

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

☐English ☐Spanish ☐Other _____

11. Is anyone in your household a veteran?

☐Yes ☐No

12. Anyone in your household receive disability benefits?

☐Yes ☐No
If yes, please mark # of each below:

_____# of Children _____# of Adults

13. What was your total household income last year?

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

14. Mark the choice that best describes you:

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

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

Example:
_____Housing
_____Emergency Services
_____Early Childhood Education
_____Transportation
_____Substance Abuse Services
_____Health Services
_____Senior Services
_____Youth Services
_____Nutrition
_____Economic/Community Development
_____Asset Development
Other:_____

TURN OVER TO COMPLETE PAGE 2

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

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

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

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

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

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

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

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

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

Please describe any other need that was not listed above:

_____

_____

Thank you for your participation!

Top 10 community needs

1. Housing
2. Early Childhood
3. Youth Services
4. Emergency Services
5. Transportation
6. Health Services
7. Substance Abuse Services
8. Senior Services
9. Economic/Community Development
10. Nutrition

Top 3 community needs

Need: Reason:

1. _____ _____

2. _____ _____

3. _____ _____

LIFT

Community Action Agency, Inc.

Customer Satisfaction Survey

Date: _____ **Please send completed forms to: 209 N 4th St, Hugo OK 74743**

1.From what program(s) did you receive assistance? (List all that apply)

_____

2.Name(s) of person(s) who assisted you. (Optional)

_____

3.What was your primary reason for visiting LIFT C.A.A.?

_____

4.How would you rate your overall satisfaction with LIFT C.A.A.? (Circle One)

Very Satisfied Somewhat Satisfied Not Satisfied

5.Please share why you were or were not satisfied with LIFT C.A.A

_____

_____

6.How did you learn of our assistance/service? (Circle One)

Friend Internet Radio TV Billboard Other (please explain)

_____

7.In what county did you receive assistance/service? (Circle One)

Choctaw McCurtain Pushmataha Other (please explain)

_____

8.Which range includes your age? (Circle One)

Under 18 18 to 30 31 to 50 51 to 65 66 or above

9.What is your gender? (Circle One)

Male Female Prefer Not To Answer

10.What is your race? (Circle One)

White Black/African American Native Hawaiian/Pacific Islander Asian

American Indian Two or More Races Prefer Not To Answer

11.What is your ethnicity? (Circle One)

Hispanic/Latino Non-Hispanic/Latino

12.Do you have any suggestions for improving our products/services?

_____

_____

13.Would you like to provide LCAA with your testimonial as to how this service assisted you?

_____

_____

MISSION STATEMENT – VICTIM SERVICES PROGRAMS

LIFT COMMUNITY ACTION AGENCY, INC.

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

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

Community Action Agency

Employee of the Month Nomination

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

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

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

Date: 1-2-2025

Name of Person being nominated for Employee of the Month: Taylor Dunn

Name of Person submitting the nomination: Susan Terry-Ball

x	Is a hard worker	she steps up and helps everyone
x	Respects others	yes
x	Is on time	unless an emergency
x	Is organized	very
x	Keeps a positive attitude	always makes us laugh
x	Encourages other people	keeps us motivated
x	Is willing to help others	yes
x	Makes a good first impression	yes
x	Follows all workplace rules	yes
x	Uses resources wisely	all the time
x	Has good work attendance	yes
x	Represents the agency well	yes
x	Is a loyal employee	yes
x	Handles crisis well	yes
x	Goes above and beyond the call of duty	everyday
x	Works well with others (team player)	all the time

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

x Is creative yes

x Likes to learn new things yes

x Is a good listener very good

x Communicates well yes

x Dependable yes

x Respectful, considerate of others yes

x Safety conscious yes

x Good problem solving skills yes

____ Other _____

____ Other _____

____ Other _____

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

Taylor Dunn is an amazing person. Life has been unfair to her this last year but she always has a positive attitude and does her job. She is considerate of others and is always willing to go above and beyond her job duties. She keeps Building 4 on our toes. Taylor has taken the Second Chance Program and it has become her passion to make sure all those incarcerated have a second chance once they are released. She approached the Choctaw and Pushmataha County Coalitions to ask for funds to provide those incarcerated with stocking stuffers, hygiene items and candy for Christmas this past year. That was a huge success. She has joy in helping those less fortunate. Taylor strives to change the world even if it is one person at a time.

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.

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

Eligibility, Recruitment, Selection, Enrollment & Attendance

During the month of November there were 44 children, age birth to 3, that were provided services in the Early Head Start centers and 104 children served, age birth to 3, in the Early Head Start – Child Care locations. Services were provided for 261 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 tye-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 November, the Nutrition team has been very busy. We have started our 2nd round of CACFP (Child and Adult- Care Food Program) kitchen checks, we are very pleased to find that there are no findings and all paperwork is up to date and completed accordingly so far. The Nutrition team also completed our 3rd semester Early 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 presented the BMI report in our FCE/Mental Health Meeting.

Health

- Most all of the 45-day screening for health is complete, with 8 more as of November 12, 2024. These 8 children are still in the 45-day window. Immunization are going well, with only a few

that need caught up. Across all 3 program there are only 8 children that have exemptions from immunizations.

- 245 out of 263 have passed hearing screening, with 18 having failed, they will either be rescreened or referred to an audiologist. 248 out of 263 have passed vision screenings. Of the 15 that failed, 14 need a professional exam, 1 received glasses.
- Well child exams/physical/dentals are on track. We currently have 206 dentals out of 263. Of those 25 are past due with appts past the 90-day window and 32 are still within their 90-day window, 221 physicals out of 263. Of those 19 are past due with appts past the 90-day window and 23 are still in the 90-day window. Currently there is 2 children with a high lead level and parents are aware and are waiting on the doctor to rescreen and lead info was sent to staff to give to parents.
- We have finished head start folder checks and have about 6 weeks left to finish up EHS and ELC. We currently keep staff updated with the newest safety info available. We are providing training to our centers on active supervision and health and safety on a regular basis.
- Early Head Start and Early Head Start Child Care are currently in good shape with immunizations and are working on completing necessary exams. There is only 1 child with a high lead level and that child will be rescreened this month.
- We are still a training site for the American Heart Association and Oklahoma State Fire Service Training Center. We currently have 2 people in the office that can teach CPR.
- We have sent out information handouts on the Flu and RSV. We also are reminding parents not to kiss or pick up infants without permission due to cold and flu season being here. We have only had a few cases of rsv/flu

Education

It was once said that children are our most valuable assets. Parents are also valuable parts of their children's lives. The parent/child relationship is essential to a child's school readiness and success in school. As education specialists, Sommer and I would like to thank parents for their involvement in the lives of children. Many parents volunteer their time to Policy Council, reading to children, Parent Meetings, Dad's Day, etc.

Thanksgiving Holidays gave children and teaching staff a much-needed break. We are appreciative of our teaching staff and the effort they put into educating young children. As parents and visitors see the classroom, they may be unaware that staff are responsible for lesson plans, observations/documentations, screenings, family contacts, health, disability, mental health, transition paperwork. Please take time to thank your child's teacher for their devotion in educating children.

Professional Development

During the month of November, the Professional Development Specialist scheduled CPR/First Aid classes taught by LIFT CPR Instructors Tori Williams and/or Ronda Spear, where several LIFT employees received or renewed their Adult and Infant CPR and First Aid certifications. An ELCCT

class was scheduled by the Professional Development Specialist in which newly hired LIFT Head Start/Early Head Start employees participated.

The Professional Development Specialist also helped several Head Start/Early Head Start employees apply for and/or renew their Professional Development Ladders and Oklahoma Director's Credentials in November.

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 November 2024.

Canva Club

- The OKACAA offered an opportunity to join a webinar to learn more about utilizing Canva to further market your Head Start program. The outreach specialist joined the webinar and learned more tips and tricks to enhance our outreach efforts.

Choctaw County Public Library

- Coloring sheets with our program information were provided to the library to set out in their children's area.



Help Me Grow Newsletter

- The Help Me Grow Newsletter is a monthly newsletter with family engagement activities, along with information regarding HS/EHS/EHS-CC and our Family Resource Center.



Community Partnerships

Outreach Specialist attends coalition and community partner meetings to promote HS/EHS/CC program and to also learn about events and resources in our community, while also networking and engaging with key community partners.

Radio Ad:

LIFT Head Start is hiring! We are accepting applications for Teacher Assistants and Special Needs Aides in Choctaw, McCurtain and Pushmataha counties. This is a great opportunity to gain hands-on experience, with future advancement opportunities in Head Start. It also allows you to enjoy a similar schedule to your school-aged children. As a Head Start Teacher Assistant, you will assist the Head Start Teacher in all aspects of the care and training of children enrolled in the Head Start Program. As a Special Needs Aide, you will work one-on-one with preschool aged children and will be responsible for the care, well-being, safety, and education of a special needs child. We are currently offering a sign-on incentive to join our Head Start team! $1,200 for a Special Needs Aide and $1,500 for a Teacher Assistant! If you have a passion for working with young children, submit your application today at www.liftca.org. Questions? Call us! 580-326-7581. *Incentives will be discussed during the interview process.

Social Media Impact

On our LIFT Head Start/Early Head Start Facebook page we continue to post program information, a direct link to an online application, open job positions, classroom highlights, family engagement activities, resource information, and conscious discipline highlights.

Job Highlights with the most views/interactions:



Views	Reach	Interactions	Link clicks
3,600	1,661	34	14



Overview

Views	Reach	Interactions	Link clicks
1,609	2,504	28	11

Classroom Highlight with the most views/interactions:



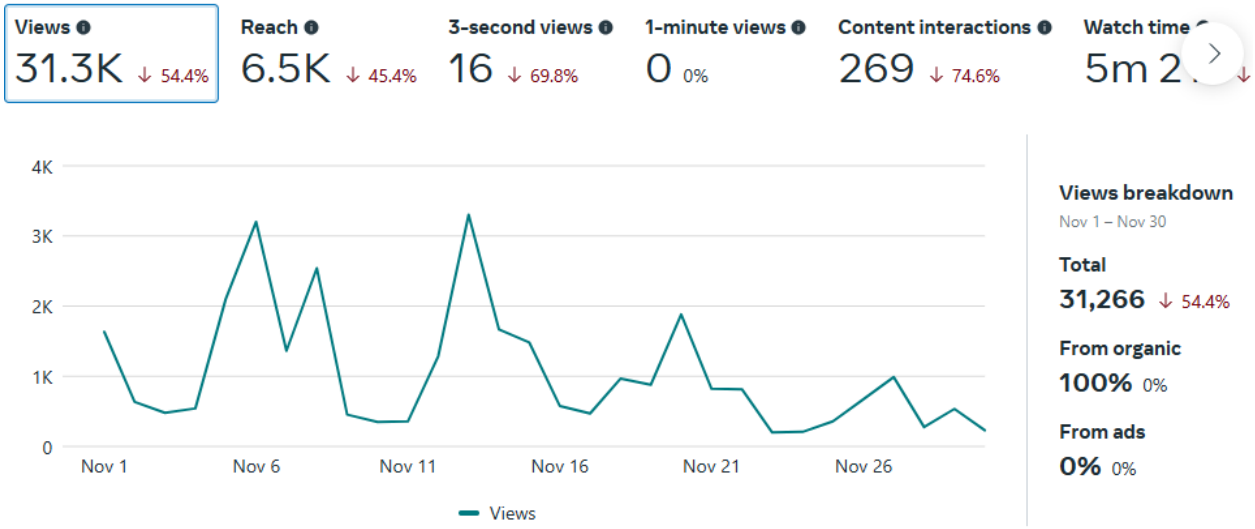
Views	Reach	Interactions
1,101	564	11

Enrollment Post with the most views/interactions:



Views	Reach	Interactions
799	449	15

Overall Facebook Data:



FCE/Mental Health Advisory Meeting

- On November 19th, we held our FCE and Mental Health Advisory meeting here at Head Start. During the meeting, we discussed our recruitment strategies and provided flyers and information to our community partners that attended to provide to families they serve.

Partnering with Local Restaurants

- Angie's Circus City Diner requested more kid menus at their location. Our program information is included on each menu with direct access to an application utilizing a QR code.





Family Resource Center/Help Me Grow Oklahoma

Our Family Resource Center has been taking calls and walk-ins from the community and helping connect families with important resources. We are planning our first CPR/First Aid training, which will be a re-occurring event offered monthly. This will be a free training opportunity for the parents/caregivers in our community. We also held a Resource Drive at our LIFT CAA In-service training, staff provided cleaning supplies and hygiene products to help support the needs of our community.



My Love Letter to the Head Start Program

Dear Head Start family and friends,

As my time winds down as director of the Office of Head Start (OHS), I am sending you a note to share my feelings of fondness for and appreciation of our nation's Head Start program. I also want to express my gratitude to all of you who help bring this wonderful program to life.

The Head Start program captured my heart fully 25 years ago, and I have — from that day forward, for richer and poorer, in sickness and in health — loved and cherished this program. And over these many years, we have grown together through *expansions*, *reauthorizations*, *sequestrations*, and *updated regulations*.

I. Love. The. Head. Start. Program.

I love the Head Start program because of its audacity to wage war against poverty: It draws a line in the sand to safeguard America's most precious resource — children and families — by putting a check on homelessness, food insecurity, health disparities, education inequality, and other factors commonly associated with poverty.

I love the Head Start program because of its thoughtful, research-based design that necessarily includes the involvement and input of parents and caregivers at the heart of its service-delivery model.

I love the way Head Start programs make room for an individual's talents to be incubated and nurtured, often creating a glidepath for a parent (or anyone!) to go from a program volunteer to a classroom aide, a teacher or family service worker, a manager, to a CEO.

I love that the Head Start program's worldview does not ignore those who society often renders as "the least of these" and that the program truly understands that poverty does not have to be a final destination for anyone.

Much has been said about the Head Start program's unique brand of "comprehensive services" — that signature blend of education, health, nutrition, and family engagement services that distinguishes Head Start from all other early care and education programs. I so love this about the Head Start program! And through the years, I have come to more fully understand that it is the *cumulative effect* of all these services working together that produces the child and family outcomes that we are all driving toward. Routine dental screenings with follow-up treatment and timebound goal setting with parents are as

critical to breaking the cycle of poverty as addressing early learning domains in the classroom. We never want to prioritize one service over the others, but rather embrace them all to achieve full impact.

I love the Head Start program because it is reliably fulfilling its destiny as a critical stakeholder in the broader early care and education ecosystem, working alongside child care, pre-K, home visitation programs, and *family, friend, and neighbor care* with purpose to support the needs of children birth to age 5. The Head Start program has never been funded to serve every eligible child. Maybe one day that will change. But in my 25 years, I have yet to read a single data report or statistic confirming that every young child has access to high-quality care. Until then, there always remains an opportunity for Head Start programs everywhere to recruit and enroll eligible children of greatest need.

I love the amount of flexibility allowed by Head Start regulations. Among the statutes and performance standards is a handful of ordinances that unlocks endless possibilities for Head Start grant recipients to implement innovative and new approaches to service delivery. Please do not overlook or underestimate the power of 45 CFR §1302.24 of the Head Start Program Performance Standards or Section 648 of the Head Start Act, which grant the authority for innovative program models. These provisions empower Head Start programs to reimagine and redesign their service models to meet the unique needs of 21st century families living in each service area — spanning from Puerto Rico to Pennsylvania, Pleasant Hill, Plainview, the Pueblos, Pilot Station, and the Pacific Islands.

As part of our nation's prescription for breaking the cycle of poverty, the Head Start program is more than a just a service provider. It is also, more broadly, a *strategy* that can be implemented to transform whole communities by building a highly skilled workforce and improving local infrastructure to support the healthy development and success of children and families.

I know that I am not the only one who loves the Head Start program. The list of supporters and champions of this six-decades-old, time-tested strategic blueprint is as diverse as it is long. The Head Start program is highly regarded by so many: previous and current enrollees, staff, community partners and advocates, civil servants and public officials, vendors and consultants, researchers, policymakers, funders, and everyday people who know a good thing when they see it.

We all get to love the Head Start program in our own ways! And in those rare instances when, driven by our love, we might find ourselves at odds about what is best for the program, let us pause for just a moment to remember that true love will always seek to protect and build up.

I will never fully understand why I was so graciously given the opportunity to lead the program I have loved so deeply for so many years; but I am eternally grateful to President Biden for the tremendous blessing of this appointment as director of OHS!

A huge thank you to everyone who has worked so hard over the last four years to preserve and protect the legacy of the Head Start program. I'm excited for the possibilities — imagined and unimagined — for the Head Start program's next 60 years.

With profound gratitude,



Khari M. Garvin
Director
Office of Head Start

Administration for Children & Families | Office of Head Start

Office of Head Start

Explore content posted to **HeadStart.gov** throughout the month of December. 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 page to see its Spanish translation.

News from OHS

- Amplifying Tribal Voices: Feedback from AIAN Head Start Stakeholders (email)
- FY25 Monitoring Focus Area 1 Overview Informational Session (video)
- Head Start Collaboration Office Insights
  - How State Systems Support Inclusion and Belonging (video)
- New Grant Opportunity Packages in the NOFO Locator (email)
- Preparing for the Transition to HeadStart.gov in 2025 (email)
- Program Data and Reports
  - Head Start Investments by State
- Workforce Webinar and Resources: Key Strategies to Support Head Start Staff (email)
  - Available in Spanish (español)
- Upcoming Fiscal Year (FY) 2024 Improper Payment Study (email)
- Urban Program Spotlight on Serving McKinney-Vento–eligible Families (video)
- 2024 ACF Tribal Early Childhood Consultation Report (email)

Training and Technical Assistance Resources

Early Childhood Development, Teaching, and Learning

- Building Positive and Engaging Relationships with Families (video)
- Connecting Research to Practice: Tips for Working with Infants, Toddlers, and Their Families
  - Early Social Interactions Build Connections in the Brain
  - Fostering Infant Relationships with Peers and Siblings
  - The Magic of Music for Infants and Toddlers
  - Using American Sign Language for Early Learning
- Exploring Social Studies in Family Child Care Settings (video)
- Exploring the Updated Head Start Multicultural Principles (videos)
  - Introduction
  - Explore
  - Grow
  - Nurture
- Highly Individualized Teaching and Learning in Preschool (video)
- Supporting the Dreams of Black Boys and Their Families (video)
- Supporting Multiracial Children (video)
- 2024 Dual Language Learner Celebration Week (videos)
  - Day 1
  - Day 2
  - Day 3

Health, Behavioral Health, and Safety

- Adult Recess Activities for Self-regulation (video)
- Families as Partners in Healthy Active Living
- Health and School Readiness of Young Black Boys
- Health Manager Orientation Guide
  - Staff Wellness
    - Role of the Health Manager
    - Sharing Information About Staff Wellness
    - Staff Wellness Planning

- Home Visitor's Guide to Helping Families Reduce the Spread of Illness
- Managing Common Illnesses to Support Healthy Learning Environments (video)
- Mindfulness in Head Start Settings
- Protecting Children from Lead in Drinking Water in an Early Childhood Facility (email)
  - Available in Spanish (español)
- The Buzz About Using the Bee CALM Backpack (video)
- Understanding Mental Health Consultation in Head Start Programs
- Using Health Literacy to Improve My Family's Health

Parent, Family, and Community Engagement

- Head Start and Refugee Resettlement Programs' Communications Guide
- Learning Course About Supporting Healing and Resilience

Program Management and Fiscal Operations

- Annual Community Assessment Update Considerations
- Leadership Coaches Drive Organizational Growth
- Nurturing Employee Fit

Newsletters

- Disabilities Services Newsletter Issue No. 86
- Play the Head Start Way Newsletter Issue No. 8
- Resources to Make You Smile! Issue No. 46
  - Available in Spanish (español)
- Sesame Street in Communities Issue No. 38
  - Available in Spanish (español)
- Small Bites Issue No. 15
  - Available in Spanish (español)

Subscribe now to get all your favorite newsletters direct to your inbox.

Head Start Careers

- Director of Early Childhood Services *Sonora, CA*
- Grantee Specialist *New York, NY*
- System Specialist Head Start TTA *Denver, CO*

Find more **Head Start program employment opportunities** in the Job Center.

Upcoming Events for January

- Wednesday, Jan. 8
  - Improper Payment Study and Recordkeeping
  - MyPeers Orientation for Health and Nutrition Staff
- Tuesday, Jan. 14: National Head Start Fellowship Program Informational Webinar
- Wednesday, Jan. 15: The Coaches' Role in the Behavior Support Plan Process
- Thursday, Jan. 16
  - Bite-sized Safety: Preventing Choking Hazards
  - Strategies for Teaching American Sign Language
  - MyPeers Orientation for Classroom Staff
- Monday, Jan. 27: Infant and Early Childhood Mental Health Consultation National Office Hours
- Thursday, Jan. 30: Around the World: Cultural Food Resources

Visit HeadStart.gov for a full list of **upcoming events**.

Stay connected! Follow the Office of Head Start on X, Facebook, and Instagram. Visit the Family Room blog to learn more about the activities of the Administration for Children and Families (ACF).

MEALS SERVED TO CHILDREN IN HEAD START & EARLY HEAD START
12 Month Summary Report

Children that eat 2 meals and a snack at Head Start/ Early Head Start receives 1/2 to 2/3 of their daily nutritional needs.

Month	Breakfast	Lunch	Snack	Monthly Total
December-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
November-24	2277	2261	2827	7365
December-24	2296	2270	2796	7362
YEARLY TOTALS	29613	29520	36666	95799

November 2024 HEAD START TIME & ATTENDANCE REPORT

As of 11/30/24	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	10		10	1		1	9	0		9		12	80.6%
Antlers 2			0			0	0	0		0			
Battiest	8		8	2		2	6	0		6	1	12	94.4%
Boswell 1	12		12			0	12	0		12	5	12	95.8%
Boswell 2	12		12			0	12	0		12	5	12	94.4%
Broken Bow 1	11		11			0	11	0		11	2	13	77.6%
Broken Bow 3	10		10			0	10	0		10		13	89.2%
Clayton 1	9		9			0	9	0		9	2	16	87.5%
Clayton 2	8		8			0	8	0		8	2	16	93.0%
Forest Grove 1	18	1	19	3		3	16	0		16	8	12	87.7%
Forest Grove 2	13		13		2	2	11	2	11/12/2024	13	3	12	88.7%
Fort Towson	8		8	1		1	7	0		7	1	12	81.0%
Haworth	8	2	10			0	10	0		10	3	12	78.1%
Horace Mann 1	11		11	1		1	10	0		10		13	81.5%
Horace Mann 2	16		16	1	1	2	14	1	11/15/2024	15	1	13	83.3%
Horace Mann 3	11		11			0	11	0		11	2	13	82.5%
Hugo 2	11		11	1		1	10	0		10		13	77.7%
Hugo 4	12		12	2		2	10	0		10	2	13	86.2%
Idabel 1	8		8			0	8	0		8		15	91.7%
Idabel 2	10		10			0	10	0		10		15	86.7%
Idabel 3	10		10			0	10	0		10		15	89.3%
Rattan 1	10		10			0	10	0		10	3	11	91.8%
Rattan 2	3		3			0	3	0		3	1	12	100.0%
Rattan 3	4		4	1		1	3	0		3		12	97.2%
Soper 1	17		17			0	17	0		17	9	12	96.6%
Soper 2	12		12	1		1	11	0		11	5	12	93.2%
Valliant 1			0			0	0	0		0			
Valliant 2	19		19	5	1	6	13	1	11/22/2024	14	2	15	89.5%
TOTALS	281	3	284	19	4	23	261	4		265	57		87.9%

November 2024 Pre-K TIME & ATTENDANCE REPORT

As of 11/30/24	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	12	100.0%
TOTALS	3	0	3	0	0	0	3		100.0%

November 2024 EHS Time and Attendance

As of 11/30/24	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	30		30	7	2	9	21	1	2	11/18/2024	17	78.2%
Hugo	15		15	3		3	12		0		17	76.5%
Idabel	14		14	2	1	3	11	2	1	11/22/2024	17	86.1%
TOTALS	**59**	**0**	**59**	**12**	**3**	**15**	**44**	**3**	**3**			**79.8%**

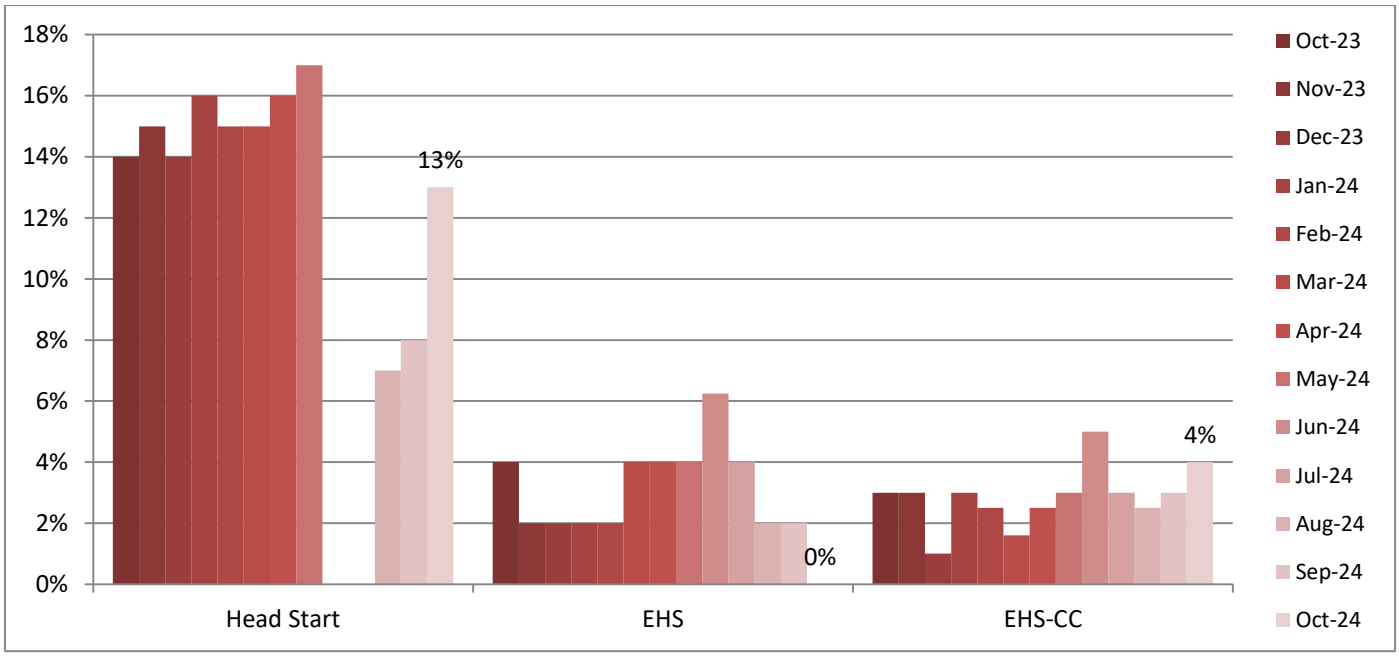
November 2024 EHS-CC Time and Attendance

As of 11/30/24	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	11		11	2	2	4	7	2	2	11/22/2024	17	83.1%
ELC-Broken Bow	18		18	5		5	13	1	0		17	85.5%
ELC-Hugo	10	1	11	3		3	8		0		17	72.6%
ELC-Idabel	17	1	18	3	2	5	13	2	2	11/22/2024	17	90.8%
Cabbage Patch	29		29	5	1	6	23	2	1	11/22/2024	19	98.0%
The LearningTree	52	2	54	14		14	40	2	0		19	85.9%
TOTALS	**137**	**4**	**141**	**32**	**5**	**37**	**104**	**9**	**5**			**88.2%**

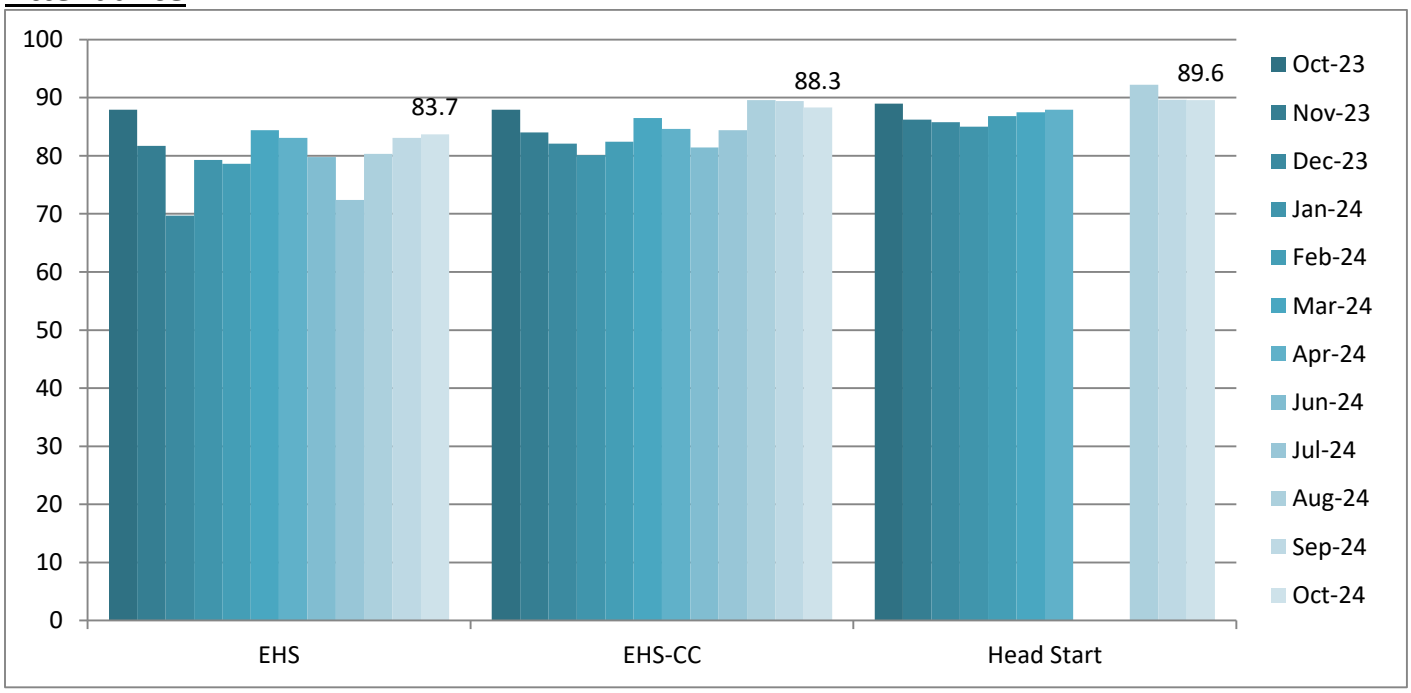
Data Analysis Report Summary
October 2024

Disabilities

IEP/IFSP –

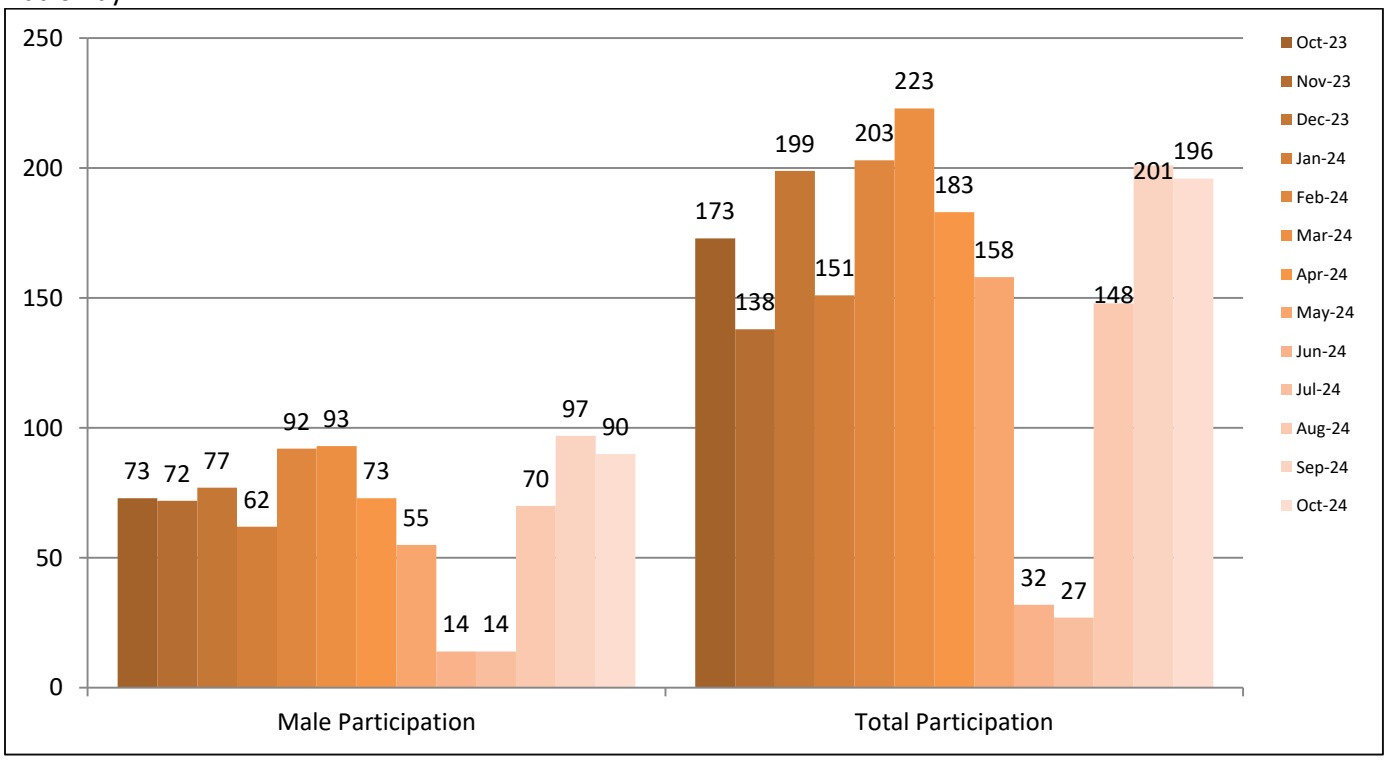


Attendance

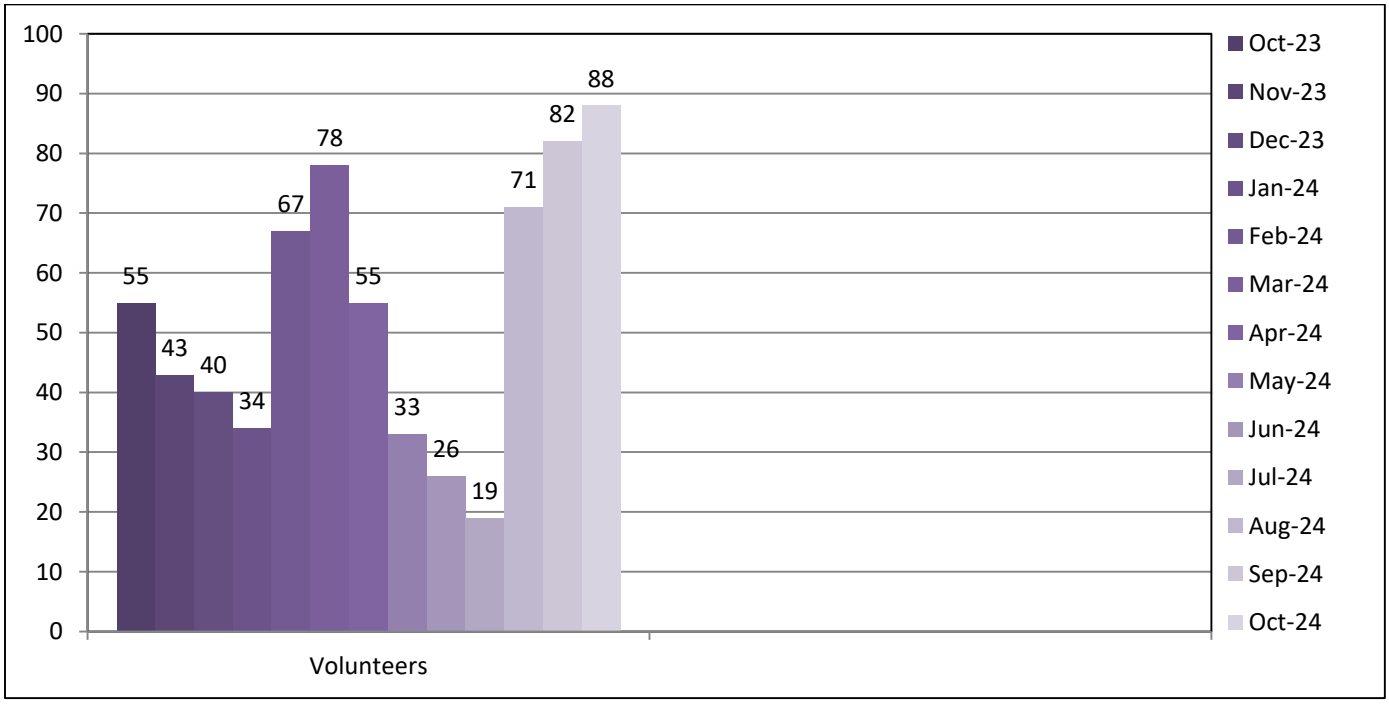


Family & Community Engagement

Dad's Day



Parents Ready to Read



Department of Health and Human Services

Administration for Children and Families

Notice of Award

Award# 06CH012393-02-01
FAIN# 06CH012393
Federal Award Date: 12/19/2024

Recipient Information

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

2. Congressional District of Recipient
02

3. Payment System Identifier (ID)
1730772321A1

4. Employer Identification Number (EIN)
730772321

5. Data Universal Numbering System (DUNS)
095453171

6. Recipient's Unique Entity Identifier (UEI)
XL9DVU1YDGU2

7. Project Director or Principal Investigator
Ms. Darla Galyon
dgalyon@ldcaahs.org
580-326-7581

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

Federal Agency Information
ACF/OHS Region VI Grants Office

9. Awarding Agency Contact Information
Ms. Heather Colwell
Grants Management Officer
heather.colwell@acf.hhs.gov
214-767-8850

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

Federal Award Information

11. Award Number
06CH012393-02-01

12. Unique Federal Award Identification Number (FAIN)
06CH012393

13. Statutory Authority
42 USC 9801 ET SEQ

14. Federal Award Project Title
Head Start and Early Head Start

15. Assistance Listing Number
93.600

16. Assistance Listing Program Title
Head Start

17. Award Action Type
Change in Scope

18. Is the Award R&D?
No

Summary Federal Award Financial Information

19.	**Budget Period Start Date** 12/01/2024 **- End Date** 11/30/2025	
20.	**Total Amount of Federal Funds Obligated by this Action**	$0.00
	20a. Direct Cost Amount	($411.00)
	20b. Indirect Cost Amount	$411.00
21.	Authorized Carryover	$0.00
22.	Offset	$0.00
23.	Total Amount of Federal Funds Obligated this budget period	$2,307,266.00
24.	**Total Approved Cost Sharing or Matching, where applicable**	$576,817.00
25.	**Total Federal and Non-Federal Approved this Budget Period**	$2,884,083.00
26.	**Period of Performance Start Date** 12/01/2023 **- End Date** 11/30/2028	
27.	Total Amount of the Federal Award including Approved Cost Sharing or Matching this Period of Performance	$8,652,247.00

28. Authorized Treatment of Program Income
ADDITIONAL COSTS

29. Grants Management Officer – Signature
Ms. Heather Colwell
Grants Management Officer

30. Remarks

Department of Health and Human Services

Administration for Children and Families

Notice of Award

Award# 06CH012393-02-01
FAIN# 06CH012393
Federal Award Date: 12/19/2024

Recipient Information

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

Congressional District of Recipient
02

Payment Account Number and Type
1730772321A1

Employer Identification Number (EIN) Data
730772321

Universal Numbering System (DUNS)
095453171

Recipient's Unique Entity Identifier (UEI)
XL9DVU1YDGU2

31. Assistance Type
Discretionary Grant

32. Type of Award
Service

33. Approved Budget
(Excludes Direct Assistance)

I. Financial Assistance from the Federal Awarding Agency Only
II. Total project costs including grant funds and all other financial participation

a. Salaries and Wages	$1,309,822.00
b. Fringe Benefits	$433,100.00
c. Total Personnel Costs	$1,742,922.00
d. Equipment	$0.00
e. Supplies	$19,515.00
f. Travel	$5,194.00
g. Construction	$0.00
h. Other	$179,552.00
i. Contractual	$15,600.00
j. TOTAL DIRECT COSTS	$1,962,783.00
k. INDIRECT COSTS	$344,483.00
l. TOTAL APPROVED BUDGET	$2,307,266.00
m. Federal Share	$2,307,266.00
n. Non-Federal Share	$576,817.00

34. Accounting Classification Codes

FY-ACCOUNT NO.	DOCUMENT NO.	ADMINISTRATIVE CODE	OBJECT CLASS	ASSISTANCE LISTING	AMT ACTION FINANCIAL ASSISTANCE	APPROPRIATION
5-G064122	06CH01239302	ACFOHS	41.51	93.600	$0.00	75-25-1536

Department of Health and Human Services

Administration for Children and Families

Notice of Award

Award# 06CH012393-02-01
FAIN# 06CH012393
Federal Award Date: 12/19/2024

35. Terms And Conditions

STANDARD TERMS

1. The ***ACF Standard Terms and Conditions*** applies to all ACF awards and is located on the **Award Terms and Conditions** page. The *Supplemental Terms and Conditions* herein are additional requirements applicable to the program named below.

   By acceptance of awards for this program, the recipient agrees to comply with the requirements included in both the *Standard* and *Supplemental Terms and Conditions* for this program.

   1. The administration of this program is authorized under the Head Start Act, as amended by the Improving Head Start for School Readiness Act of 2007, Public Law 110-134 at https://eclkc.ohs.acf.hhs.gov/policy/head-start-act.

   2. The program is codified at 42 U.S.C. 9831 et seq at https://eclkc.ohs.acf.hhs.gov/policy/head-start-act/sec-636-statement-purpose

   3. Implementing program regulations are published as the Head Start Program Performance Standards at 45 CFR Parts 1301 to 1305, https://eclkc.ohs.acf.hhs.gov/policy/45-cfr-chap-xiii. Additional program guidance is located on the Early Childhood Learning & Knowledge Center (ECLKC), https://eclkc.ohs.acf.hhs.gov/. Recipients must act in compliance with the Program Instructions and Information Memoranda. For full text, go to https://eclkc.ohs.acf.hhs.gov/policy/pi and https://eclkc.ohs.acf.hhs.gov/policy/im.

   4. This award is subject to the Uniform Administrative Requirements, Cost Principles, and Audit Requirements (UAR) for HHS Awards found at 45 CFR Part 75 at https://www.ecfr.gov/current/title-45/subtitle-A/subchapter-A/part-75.

   a. For all monetary and non-monetary awards issued before October 1, 2024, HHS adopted from the federalwide UAR 2 CFR 200:

   i. Subpart D – Post Federal Award Requirements – Closeout at 2 CFR 200.344

   b. For monetary awards issued on or after October 1, 2024, per the Federal Register (FR), 89 FR 80055, HHS' UAR at 45 CFR Part 75 includes eight (8) regulatory provisions that HHS adopted from the federalwide UAR 2 CFR 200 This award is subject to the following eight (8) regulatory provisions in 2 CFR 200:

   i. Subpart A – Acronyms and Definitions – 2 CFR 200.1 "Modified Total Direct Cost (MTDC)

   ii. Subpart D – Post Federal Award Requirements – Disposition of Equipment at 2 CFR 200.313(e)

   iii. Subpart D – Post Federal Award Requirements – Supplies at 2 CFR 200.314(a)

   iv. Subpart D – Post Federal Award Requirements – Micro-purchase thresholds at 2 CFR 200.320

   v. Subpart D – Post Federal Award Requirements – Fixed amount subawards at 2 CFR 200.333

   vi. Subpart D – Post Federal Award Requirements – Closeout at 2 CFR 200.344

   vii. Subpart E – Cost Principles – Indirect Costs – De minimis rate at 2 CFR 200.414(f)

viii. Subpart F – Audit Requirements – Single Audit at 2 CFR 200.501

5. This award is subject to Executive Orders in the Federal Register available at https://www.federalregister.gov/presidential-documents/executive-orders

6. This award is subject to requirements or limitations in any applicable Appropriations Act available at https://crsreports.congress.gov/.

7. This award is subject to the Administrative and National Policy Requirements at https://www.acf.hhs.gov/grants/administrative-and-national-policy-requirements.

8. This award is subject to the HHS Grants Policy Statement (HHS GPS).

a. For all monetary and non-monetary awards issued before October 1, 2024, this award is subject to the HHS Grants Policy Statement: https://www.hhs.gov/sites/default/files/grants/grants/policies-regulations/hhsgps107.pdf This includes requirements in Parts I and II. Although consistent with the HHS GPS, any applicable statutory or regulatory requirements, including 45 CFR Part 75, directly apply to this award apart from any coverage in the HHS GPS.

b. For monetary awards issued on or after October 1, 2024, this award is subject to the requirements of the HHS Grants Policy Statement (HHS GPS) that are applicable based on your recipient type and the purpose of this award. This includes requirements in Parts I and II available at https://www.hhs.gov/grants-contracts/grants/grants-policies-regulations/index.html. Although consistent with the HHS GPS, any applicable statutory or regulatory requirements, including 45 CFR Part 75, directly apply to this award apart from any coverage in the HHS GPS.

COST SHARING OR MATCHING (NON-FEDERAL SHARE) OF PROGRAM FUNDING

9. Recipients are required to meet a non-federal share of the project cost, in accordance with Section 640(b) of the Head Start Act, 42 U.S.C. § 9835(b). Recipients must provide at least 20 percent of the total approved cost of the project. The total approved cost of the project is the sum of the ACF (federal) share and the non-federal share. The non-federal share may be met by cash or in-kind contributions. Any shared costs or matching funds and all contributions, including cash and third-party in-kind contributions, must be accepted as part of the recipient's cost-sharing or matching when such contributions meet all criteria listed in 45 CFR § 75.306.

10. The responsible HHS official may approve a waiver of all or a portion of the non-federal match requirement based on a recipient's written application submitted for the budget period and any supporting evidence the responsible HHS official requires. In deciding whether to grant a waiver, the responsible HHS official will consider the circumstances specified at section 640(b) of the Act and whether the recipient made a reasonable effort to comply with the non-federal match requirement.

a. **Matching Waiver Pursuant to 48 U.S.C. 1469a(d)** Matching requirements (including in-kind contributions) of less than $200,000 are waived under awards made to the governments of American Samoa, Guam, the U.S. Virgin Islands, and the Commonwealth of the Northern Mariana Islands (other than those consolidated under other provisions of 48 U.S.C. 1469) pursuant to 48 U.S.C. 1469a(d). This waiver applies whether the matching required under the award equals or exceeds $200,000.

FINANCIAL REPORTING

11. The OMB approved Financial Reporting form for this program is the Federal Financial Reports (SF-425). This form must be submitted in the Payment Management System (PMS) as described in ACF-PI-

OHS-24-01: https://eclkc.ohs.acf.hhs.gov/policy/pi/acf-pi-ohs-24-01.

a. *PMS SF-425 Information*: https://pms.psc.gov/grant-recipients/ffr-updates.html

b. For support using PMS, contact your PMS Liaison Accountant: https://pms.psc.gov/find-pms-liaison-accountant.html

c. Post-Award Reporting Forms and Instructions: https://www.grants.gov/forms/forms-repository/post-award-reporting-forms

12. *Obligation Deadline*: Funds must be obligated within the budget period established by the Notice of Award (NoA) on Line 19. If funds cannot be obligated within the established budget period, recipients may apply to carryover the balance or for a no-cost extension, as applicable, in Head Start Enterprise System (HSES) applications. Applications for a carryover balance should be initiated once the actual unobligated balance is known (generally during the period allowed for preparation and submission of the annual Federal Financial Report. Applications for a no-cost extension must be submitted at least 10 calendar days before the end of the period of performance of the award.

13. *Liquidation Deadline:*

a. Recipients must liquidate all financial obligations incurred under the Federal award no later than 90 calendar days after the end date of the budget period, except for the final budget period, unless the Federal awarding agency or pass-through entity authorizes an extension,

b. During the final budget period within a period of performance recipients must liquidate all financial obligations incurred under the Federal award no later than 120 calendar days after the end date of the period of performance unless the Federal awarding agency or pass-through entity authorizes an extension. Any funds not expended by this timeframe must be returned to the U.S. Department of Health and Human Services.

PROGRAM REPORTING

14. The OMB approved Program Report form for this program is the Head Start Program Information Report (PIR, OMB Control No. 0970-0427). All grant recipients and sub-recipients are required to submit a PIR for Head Start and Early Head Start programs annually. PIR submissions are only accepted electronically using the Head Start Enterprise System (HSES).

a. PIR guidance, reference materials, change highlights and frequently asked questions are available at: http://eclkc.ohs.acf.hhs.gov/pir.

b. For assistance and/or support contact the HSES help desk at help@hsesinfo.org

PROPERTY REPORTING

15. This award is subject to the Property Related T&Cs found at https://www.acf.hhs.gov/grants/manage-grant/grant-award/property-terms.

16. The OMB approved property reporting is the following:

a. Real Property Reports (SF-429s). The SF-429 Real Property forms are applicable to this program and must be submitted as described in ACF-PI-HS-17-03: https://eclkc.ohs.acf.hhs.gov/policy/pi/acf-pi-hs-17-03.

i. For assistance accessing the SF-429: https://home.grantsolutions.gov/home/recipient-oldc-training-resources/

ii. For assistance completing the SF-429s, please contact OGM-RealProperty429@acf.hhs.gov

iii. Under 45 CFR §75.323, all real property, equipment, and intangible property acquired or improved with ACF funds must be held in trust by the non-federal entity as trustee for the beneficiaries of the project or program under which the property was acquired or improved. Post-award requirements of Part 1303 must be met and the federal interest resulting from purchase, construction and major renovation activities must be protecting by filing or posting a notice of federal interest as required by 45 CFR §1303.46 - §1303.49.

b. Tangible Property Report (SF-428s). The SF-428-B Tangible Personal Property Report -Final Report must be submitted as described in ACF-PI-OHS-24-01: https://eclkc.ohs.acf.hhs.gov/policy/pi/acf-pi-ohs-24-01. The SF-428-C Tangible Personal Property Report – Disposition Request/Report must be submitted as described in the Tangible Personal Property Guidance: https://www.acf.hhs.gov/grants/manage-grant/property/tangible-property#book_content_0

i. The fillable SF-428 forms must be completed and uploaded in the Grant Notes section of GS. The Category Type of the Grant Note is Tangible Personal Property Report (SF-428).

ii. Downloadable version of fillable SF-428: https://www.grants.gov/forms/forms-repository/post-award-reporting-forms

iii. *GS User Guide*: Grant Notes: Microsoft Word - User Guide Recipient Grants List and Details GRANTS LIST .docx (grantsolutions.gov) and Quick Sheet: Grant Notes (grantsolutions.gov)

EFFECTIVE PERIOD

17. These program-specific *Supplemental Terms and Conditions* are effective on the date shown in the top right of the page and will remain in effect until updated. They will be updated and reissued only as needed whenever a new program-specific statute, regulation or other requirement is enacted or whenever any of the applicable existing Federal statutes, regulations, policies, procedures or restrictions is amended, revised, altered, or repealed. These program-specific *Supplemental Terms and Conditions* are applicable to your award when they have been incorporated by reference in your Notice of Award or subsequent award amendments.

POINTS OF CONTACT

18. Points of contact for additional information or questions concerning either the operation of the program or related financial matters can be found in the Head Start Enterprise System (HSES).

AWARD PAYMENT

19. This award will be paid through the Department of Health and Human Services, Payment Management Services, operating under the Program Support Center (PSC). The PSC provides automated award payment and cash management services from awards issued by Federal Government Awarding Agencies through the centralized payment system, Payment Management System (PMS). For more detailed information on payment through PMS, go to https://pms.psc.gov/. Drawing funds from PMS indicates acceptance and agreement to the T&Cs of the award.

UNIQUE ENTITY IDENTIFIER (UEI) NOTICE

Department of Health and Human Services

Administration for Children and Families

Notice of Award

Award# 06CH012393-02-01
FAIN# 06CH012393
Federal Award Date: 12/19/2024

20. All applicants and recipients must have an active System for Award Management (SAM) registration and UEI issued. ACF recommends that organizations start the renewal process at least 30 days prior to expiration to avoid delays in federal funding. Entities can search for help at Federal Service Desk (FSD) any time or request help from an FSD agent Monday–Friday 8 a.m. to 8 p.m. ET at https://www.fsd.gov/gsafsd_sp This award is subject to requirements as set forth in 2 CFR 25.110.

30. REMARKS (Continued from previous page)

This action approves the reduction of 153 Head Start slots pursuant to Sections 640(f)(2)(B) and 645(a)(5) of the Head Start Act and reallocates $256,211 from Head Start operations to Early Head Start operations. The conversion is effective December 1, 2024.

The revised funding levels for the current budget period for Head Start are $3,296,148 for operations and $39,956 for training and technical assistance; and $1,259,123 for operations and $19,304 for training and technical assistance for Early Head Start.

Head Start population: 234 children.
Designated Head Start service area: Choctaw, McCurtain, and Pushmataha Counties in the State of Oklahoma
Approved program options for the Head Start program: Center-based.

Early Head Start population: 48 infants, toddlers, and pregnant women.
Designated Early Head Start service area: Choctaw, McCurtain, and Pushmataha Counties in the State of Oklahoma
Approved program options for the Early Head Start program: Center-based.

Department of Health and Human Services

Administration for Children and Families

Notice of Award

Award# 06HP000581-01-01
FAIN# 06HP000581
Federal Award Date: 12/19/2024

Recipient Information

1. Recipient Name
LIFT COMMUNITY ACTION AGENCY INC
209 N 4th St
Hugo, OK 74743-3809
580-326-3351

2. Congressional District of Recipient
02

3. Payment System Identifier (ID)
1730772321A1

4. Employer Identification Number (EIN)
730772321

5. Data Universal Numbering System (DUNS)
095453171

6. Recipient's Unique Entity Identifier (UEI)
XL9DVU1YDGU2

7. Project Director or Principal Investigator
Ms. Darla Galyon
dgalyon@ldcaahs.org
580-326-7581

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

Federal Agency Information
ACF/OHS Region VI Grants Office

9. Awarding Agency Contact Information
Ms. Heather Colwell
Grants Management Officer
heather.colwell@acf.hhs.gov
214-767-8850

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

Federal Award Information

11. Award Number
06HP000581-01-01

12. Unique Federal Award Identification Number (FAIN)
06HP000581

13. Statutory Authority
42 USC 9801 ET SEQ

14. Federal Award Project Title
Early Head Start

15. Assistance Listing Number
93.600

16. Assistance Listing Program Title
Head Start

17. Award Action Type
Change in Scope

18. Is the Award R&D?
No

Summary Federal Award Financial Information

19.	**Budget Period Start Date** 08/01/2024 **- End Date** 07/31/2025	
20.	**Total Amount of Federal Funds Obligated by this Action**	$0.00
	20a. Direct Cost Amount	($28,354.00)
	20b. Indirect Cost Amount	$28,354.00
21.	Authorized Carryover	$0.00
22.	Offset	$0.00
23.	Total Amount of Federal Funds Obligated this budget period	$2,267,831.00
24.	**Total Approved Cost Sharing or Matching, where applicable**	$103,115.00
25.	**Total Federal and Non-Federal Approved this Budget Period**	$2,370,946.00
26.	**Period of Performance Start Date** 08/01/2024 **- End Date** 07/31/2029	
27.	Total Amount of the Federal Award including Approved Cost Sharing or Matching this Period of Performance	$2,370,946.00

28. Authorized Treatment of Program Income
ADDITIONAL COSTS

29. Grants Management Officer – Signature
Ms. Heather Colwell
Grants Management Officer

30. Remarks

Department of Health and Human Services

Administration for Children and Families

Notice of Award

Award# 06HP000581-01-01
FAIN# 06HP000581
Federal Award Date: 12/19/2024

Recipient Information

Recipient Name
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209 N 4th St
Hugo, OK 74743-3809
580-326-3351

Congressional District of Recipient
02

Payment Account Number and Type
1730772321A1

Employer Identification Number (EIN) Data
730772321

Universal Numbering System (DUNS)
095453171

Recipient's Unique Entity Identifier (UEI)
XL9DVU1YDGU2

31. Assistance Type
Discretionary Grant

32. Type of Award
Service

33. Approved Budget
(Excludes Direct Assistance)

I. Financial Assistance from the Federal Awarding Agency Only
II. Total project costs including grant funds and all other financial participation

a. Salaries and Wages	$595,221.00
b. Fringe Benefits	$189,059.00
c. Total Personnel Costs	$784,280.00
d. Equipment	$0.00
e. Supplies	$61,000.00
f. Travel	$5,000.00
g. Construction	$0.00
h. Other	$141,365.00
i. Contractual	$1,119,643.00
j. TOTAL DIRECT COSTS	$2,111,288.00
k. INDIRECT COSTS	$156,543.00
l. TOTAL APPROVED BUDGET	$2,267,831.00
m. Federal Share	$2,267,831.00
n. Non-Federal Share	$103,115.00

34. Accounting Classification Codes

FY-ACCOUNT NO.	DOCUMENT NO.	ADMINISTRATIVE CODE	OBJECT CLASS	ASSISTANCE LISTING	AMT ACTION FINANCIAL ASSISTANCE	APPROPRIATION
4-G064122	06HP00058101	ACFOHS	41.51	93.600	$0.00	75-24-1536

Department of Health and Human Services

Administration for Children and Families

Notice of Award

Award# 06HP000581-01-01
FAIN# 06HP000581
Federal Award Date: 12/19/2024

35. Terms And Conditions

STANDARD TERMS

1. The ***ACF Standard Terms and Conditions*** applies to all ACF awards and is located on the **Award Terms and Conditions** page. The *Supplemental Terms and Conditions* herein are additional requirements applicable to the program named below.

   By acceptance of awards for this program, the recipient agrees to comply with the requirements included in both the *Standard* and *Supplemental Terms and Conditions* for this program.

   1. The administration of this program is authorized under the Head Start Act, as amended by the Improving Head Start for School Readiness Act of 2007, Public Law 110-134 at https://eclkc.ohs.acf.hhs.gov/policy/head-start-act.

   2. The program is codified at 42 U.S.C. 9831 et seq at https://eclkc.ohs.acf.hhs.gov/policy/head-start-act/sec-636-statement-purpose

   3. Implementing program regulations are published as the Head Start Program Performance Standards at 45 CFR Parts 1301 to 1305, https://eclkc.ohs.acf.hhs.gov/policy/45-cfr-chap-xiii. Additional program guidance is located on the Early Childhood Learning & Knowledge Center (ECLKC), https://eclkc.ohs.acf.hhs.gov/. Recipients must act in compliance with the Program Instructions and Information Memoranda. For full text, go to https://eclkc.ohs.acf.hhs.gov/policy/pi and https://eclkc.ohs.acf.hhs.gov/policy/im.

   4. This award is subject to the Uniform Administrative Requirements, Cost Principles, and Audit Requirements (UAR) for HHS Awards found at 45 CFR Part 75 at https://www.ecfr.gov/current/title-45/subtitle-A/subchapter-A/part-75.

   a. For all monetary and non-monetary awards issued before October 1, 2024, HHS adopted from the federalwide UAR 2 CFR 200:

   i. Subpart D – Post Federal Award Requirements – Closeout at 2 CFR 200.344

   b. For monetary awards issued on or after October 1, 2024, per the Federal Register (FR), 89 FR 80055, HHS' UAR at 45 CFR Part 75 includes eight (8) regulatory provisions that HHS adopted from the federalwide UAR 2 CFR 200 This award is subject to the following eight (8) regulatory provisions in 2 CFR 200:

   i. Subpart A – Acronyms and Definitions – 2 CFR 200.1 "Modified Total Direct Cost (MTDC)

   ii. Subpart D – Post Federal Award Requirements – Disposition of Equipment at 2 CFR 200.313(e)

   iii. Subpart D – Post Federal Award Requirements – Supplies at 2 CFR 200.314(a)

   iv. Subpart D – Post Federal Award Requirements – Micro-purchase thresholds at 2 CFR 200.320

   v. Subpart D – Post Federal Award Requirements – Fixed amount subawards at 2 CFR 200.333

   vi. Subpart D – Post Federal Award Requirements – Closeout at 2 CFR 200.344

   vii. Subpart E – Cost Principles – Indirect Costs – De minimis rate at 2 CFR 200.414(f)

viii. Subpart F – Audit Requirements – Single Audit at 2 CFR 200.501

5. This award is subject to Executive Orders in the Federal Register available at https://www.federalregister.gov/presidential-documents/executive-orders

6. This award is subject to requirements or limitations in any applicable Appropriations Act available at https://crsreports.congress.gov/.

7. This award is subject to the Administrative and National Policy Requirements at https://www.acf.hhs.gov/grants/administrative-and-national-policy-requirements.

8. This award is subject to the HHS Grants Policy Statement (HHS GPS).

a. For all monetary and non-monetary awards issued before October 1, 2024, this award is subject to the HHS Grants Policy Statement: https://www.hhs.gov/sites/default/files/grants/grants/policies-regulations/hhsgps107.pdf This includes requirements in Parts I and II. Although consistent with the HHS GPS, any applicable statutory or regulatory requirements, including 45 CFR Part 75, directly apply to this award apart from any coverage in the HHS GPS.

b. For monetary awards issued on or after October 1, 2024, this award is subject to the requirements of the HHS Grants Policy Statement (HHS GPS) that are applicable based on your recipient type and the purpose of this award. This includes requirements in Parts I and II available at https://www.hhs.gov/grants-contracts/grants/grants-policies-regulations/index.html. Although consistent with the HHS GPS, any applicable statutory or regulatory requirements, including 45 CFR Part 75, directly apply to this award apart from any coverage in the HHS GPS.

COST SHARING OR MATCHING (NON-FEDERAL SHARE) OF PROGRAM FUNDING

9. Recipients are required to meet a non-federal share of the project cost, in accordance with Section 640(b) of the Head Start Act, 42 U.S.C. § 9835(b). Recipients must provide at least 20 percent of the total approved cost of the project. The total approved cost of the project is the sum of the ACF (federal) share and the non-federal share. The non-federal share may be met by cash or in-kind contributions. Any shared costs or matching funds and all contributions, including cash and third-party in-kind contributions, must be accepted as part of the recipient's cost-sharing or matching when such contributions meet all criteria listed in 45 CFR § 75.306.

10. The responsible HHS official may approve a waiver of all or a portion of the non-federal match requirement based on a recipient's written application submitted for the budget period and any supporting evidence the responsible HHS official requires. In deciding whether to grant a waiver, the responsible HHS official will consider the circumstances specified at section 640(b) of the Act and whether the recipient made a reasonable effort to comply with the non-federal match requirement.

a. **Matching Waiver Pursuant to 48 U.S.C. 1469a(d)** Matching requirements (including in-kind contributions) of less than $200,000 are waived under awards made to the governments of American Samoa, Guam, the U.S. Virgin Islands, and the Commonwealth of the Northern Mariana Islands (other than those consolidated under other provisions of 48 U.S.C. 1469) pursuant to 48 U.S.C. 1469a(d). This waiver applies whether the matching required under the award equals or exceeds $200,000.

FINANCIAL REPORTING

11. The OMB approved Financial Reporting form for this program is the Federal Financial Reports (SF-425). This form must be submitted in the Payment Management System (PMS) as described in ACF-PI-

OHS-24-01: https://eclkc.ohs.acf.hhs.gov/policy/pi/acf-pi-ohs-24-01.

a. *PMS SF-425 Information*: https://pms.psc.gov/grant-recipients/ffr-updates.html

b. For support using PMS, contact your PMS Liaison Accountant: https://pms.psc.gov/find-pms-liaison-accountant.html

c. Post-Award Reporting Forms and Instructions: https://www.grants.gov/forms/forms-repository/post-award-reporting-forms

12. *Obligation Deadline*: Funds must be obligated within the budget period established by the Notice of Award (NoA) on Line 19. If funds cannot be obligated within the established budget period, recipients may apply to carryover the balance or for a no-cost extension, as applicable, in Head Start Enterprise System (HSES) applications. Applications for a carryover balance should be initiated once the actual unobligated balance is known (generally during the period allowed for preparation and submission of the annual Federal Financial Report. Applications for a no-cost extension must be submitted at least 10 calendar days before the end of the period of performance of the award.

13. *Liquidation Deadline:*

a. Recipients must liquidate all financial obligations incurred under the Federal award no later than 90 calendar days after the end date of the budget period, except for the final budget period, unless the Federal awarding agency or pass-through entity authorizes an extension,

b. During the final budget period within a period of performance recipients must liquidate all financial obligations incurred under the Federal award no later than 120 calendar days after the end date of the period of performance unless the Federal awarding agency or pass-through entity authorizes an extension. Any funds not expended by this timeframe must be returned to the U.S. Department of Health and Human Services.

PROGRAM REPORTING

14. The OMB approved Program Report form for this program is the Head Start Program Information Report (PIR, OMB Control No. 0970-0427). All grant recipients and sub-recipients are required to submit a PIR for Head Start and Early Head Start programs annually. PIR submissions are only accepted electronically using the Head Start Enterprise System (HSES).

a. PIR guidance, reference materials, change highlights and frequently asked questions are available at: http://eclkc.ohs.acf.hhs.gov/pir.

b. For assistance and/or support contact the HSES help desk at help@hsesinfo.org

PROPERTY REPORTING

15. This award is subject to the Property Related T&Cs found at https://www.acf.hhs.gov/grants/manage-grant/grant-award/property-terms.

16. The OMB approved property reporting is the following:

a. Real Property Reports (SF-429s). The SF-429 Real Property forms are applicable to this program and must be submitted as described in ACF-PI-HS-17-03: https://eclkc.ohs.acf.hhs.gov/policy/pi/acf-pi-hs-17-03.

i. For assistance accessing the SF-429: https://home.grantsolutions.gov/home/recipient-oldc-training-resources/

ii. For assistance completing the SF-429s, please contact OGM-RealProperty429@acf.hhs.gov

iii. Under 45 CFR §75.323, all real property, equipment, and intangible property acquired or improved with ACF funds must be held in trust by the non-federal entity as trustee for the beneficiaries of the project or program under which the property was acquired or improved. Post-award requirements of Part 1303 must be met and the federal interest resulting from purchase, construction and major renovation activities must be protecting by filing or posting a notice of federal interest as required by 45 CFR §1303.46 - §1303.49.

b. Tangible Property Report (SF-428s). The SF-428-B Tangible Personal Property Report -Final Report must be submitted as described in ACF-PI-OHS-24-01: https://eclkc.ohs.acf.hhs.gov/policy/pi/acf-pi-ohs-24-01. The SF-428-C Tangible Personal Property Report – Disposition Request/Report must be submitted as described in the Tangible Personal Property Guidance: https://www.acf.hhs.gov/grants/manage-grant/property/tangible-property#book_content_0

i. The fillable SF-428 forms must be completed and uploaded in the Grant Notes section of GS. The Category Type of the Grant Note is Tangible Personal Property Report (SF-428).

ii. Downloadable version of fillable SF-428: https://www.grants.gov/forms/forms-repository/post-award-reporting-forms

iii. *GS User Guide*: Grant Notes: Microsoft Word - User Guide Recipient Grants List and Details GRANTS LIST .docx (grantsolutions.gov) and Quick Sheet: Grant Notes (grantsolutions.gov)

EFFECTIVE PERIOD

17. These program-specific *Supplemental Terms and Conditions* are effective on the date shown in the top right of the page and will remain in effect until updated. They will be updated and reissued only as needed whenever a new program-specific statute, regulation or other requirement is enacted or whenever any of the applicable existing Federal statutes, regulations, policies, procedures or restrictions is amended, revised, altered, or repealed. These program-specific *Supplemental Terms and Conditions* are applicable to your award when they have been incorporated by reference in your Notice of Award or subsequent award amendments.

POINTS OF CONTACT

18. Points of contact for additional information or questions concerning either the operation of the program or related financial matters can be found in the Head Start Enterprise System (HSES).

AWARD PAYMENT

19. This award will be paid through the Department of Health and Human Services, Payment Management Services, operating under the Program Support Center (PSC). The PSC provides automated award payment and cash management services from awards issued by Federal Government Awarding Agencies through the centralized payment system, Payment Management System (PMS). For more detailed information on payment through PMS, go to https://pms.psc.gov/. Drawing funds from PMS indicates acceptance and agreement to the T&Cs of the award.

UNIQUE ENTITY IDENTIFIER (UEI) NOTICE

20. All applicants and recipients must have an active System for Award Management (SAM) registration and UEI issued. ACF recommends that organizations start the renewal process at least 30 days prior to expiration to avoid delays in federal funding. Entities can search for help at Federal Service Desk (FSD) any time or request help from an FSD agent Monday–Friday 8 a.m. to 8 p.m. ET at https://www.fsd.gov/gsafsd_sp This award is subject to requirements as set forth in 2 CFR 25.110.

30. REMARKS (Continued from previous page)

This action approves the reduction of 16 Early Head Start slots pursuant to Section 640(g)(3) of the Head Start Act, effective December 1, 2024.

Early Head Start population: 104 infants and toddlers.

Designated Early Head Start service area: Choctaw, McCurtain, and Pushmataha Counties in Oklahoma

Approved program options for the Early Head Start program: Center-based.

AmeriCorps

December 20, 2024

Rebecca Reynolds Porter
Lift Community Action Agency, Inc.
209 N. 4th St.
Hugo, OK 74743-3809

Re: Formal Match Waiver Approval for AmeriCorps Grant: #22SRGOK001

Dear Rebecca,

Thank you for requesting a match waiver on your AmeriCorps Seniors grant. Based on what you submitted, your request of a waiver is approved. We have updated your current granted match waiver for the program year 2023 to 2025 with the new match requirement of 27%.

eGrants has been updated to reflect your new match requirement. Please work with your Portfolio Manager to submit a budget amendment that accurately reflects your new match requirement and associated budget line items.

More information about the AmeriCorps Seniors Waivers and other match relief is available on the AmeriCorps Manage your grant | AmeriCorps webpage.

Sincerely,

Amy Hetrick
Acting Director, Office of Grant Administration

cc: Patricia Christensen, Portfolio Manager, AmeriCorps
Karla Luginbill, Project Director

250 E Street SW
Washington, D.C. 20525
202-606-5000 / 800-942-2677

STALKING IN THE UNITED STATES

1 IN 3 WOMEN & **1 IN 6 MEN**[1]

EXPERIENCE STALKING AT SOME POINT IN THEIR LIFETIMES

MOST COMMON STALKING TACTICS EXPERIENCED BY VICTIMS:[1]

- 75% UNWANTED PHONE CALLS
- APPROACHED/SHOWED UP 57%
- 57% TEXTS, EMAILS, MESSAGES
- FOLLOWED & WATCHED 52%
- 26% SENT GIFTS, CARDS, LETTERS

Most stalkers use multiple tactics.[3]

72% OF STALKING VICTIMS WERE **THREATENED WITH PHYSICAL HARM**

84% OF STALKING VICTIMS FELT[1] **FEARFUL** THREATENED, OR CONCERNED FOR SAFETY

11% OF STALKING CASES LAST > 5 YEARS[2]

1 in 5 stalkers use WEAPONS to threaten or harm their victims[3]

1 in 7 stalking victims RELOCATE[2]

APPROX. 13.5 MILLION PEOPLE ARE STALKED IN A 1-YEAR PERIOD[1]

WHO ARE STALKERS?[1]

- 42% ACQUAINTANCES
- 40% INTIMATE PARTNERS (CURRENT OR FORMER)
- 19% STRANGERS
- 8% BRIEF ENCOUNTERS
- 8% FAMILY MEMBERS
- 4% PERSONS OF AUTHORITY

1 IN 3 STALKERS HAVE STALKED BEFORE[3]

Citations

1. Smith, S.G., Basile, K.C., & Kresnow, M. (2022). The National Intimate Partner and Sexual Violence Survey (NISVS): 2016/2017 Report on Stalking. Atlanta, GA: National Center for Injury Prevention and Control, Centers for Disease control and Prevention. 2. Baum, K., Catalano, S., & Rand, M. (2009). Stalking Victimization in the United States. Washington, DC: Bureau of Justice Statistics. 3. Mohandie, K., Meloy, J.R., McGowan, M.G., & Williams, J. (2006). The RECON Typology of Stalking: Reliability and Validity Based upon a Large Sample of North American Stalkers. Journal of Forensic Sciences, 51(1): 147-155.

SPARC STALKING PREVENTION, AWARENESS, AND RESOURCE CENTER
STALKINGAWARENESS.ORG

STALKING FACT SHEET

WHAT IS STALKING?

While legal definitions of stalking vary between jurisdictions, a good working definition of stalking is: *a pattern of behavior directed at a specific person that would cause a reasonable person to fear for their safety or the safety of others, or suffer substantial emotional distress.*

STALKING VICTIMIZATION

- An estimated 13.5 million people are stalked in a one-year period in the United States.[A]
- Nearly 1 in 3 women and 1 in 6 men have experienced stalking victimization at some point in their lifetime.[B]
- More than half of all victims of stalking indicated that they were stalked before the age of 25, and nearly 1 in 4 were stalked before the age of 18.[C]
- The vast majority of stalking victims are stalked by someone they know: [D]
  - 40% by a current/former intimate partner,
  - 42% by an acquaintance.
- 69% of female and 80% of male stalking victims were threatened with physical harm.[E]
- People aged 18-24 experience the highest rate of stalking victimization (among adults).[F]
- Stalkers use many tactics, including:[G]
  - Making unwanted phone calls.
  - Approaching the victim or showing up in places when the victim does not want them to.
  - Following and watching the victim.
  - Sending unwanted texts, photos, emails, and messages through social media.
  - Sending unwanted gifts.
  - Using technology to monitor, track, and/or spy on the victim.
- Almost half of stalking victims experience at least one unwanted contact per week.[H]
- 11% of stalking victims have been stalked for 5 years or more.[I]
- More than twice as many victims are stalked with technology than without.[J]

IMPACT OF STALKING ON VICTIMS

- 46% of stalking victims fear not knowing what will happen next.[K]
- 29% of stalking victims fear it will never stop.[L]
- 1 in 8 employed stalking victims lose time from work as a result of their victimization and more than half lose 5 days of work or more.[M]
- 1 in 7 stalking victims move as a result of their victimization.[N]
- Stalking victims suffer much higher rates of depression, anxiety, insomnia, and social dysfunction than people in the general population.[O]

STALKING OFFENDERS[P]

- 2 in 3 of stalkers pursue their victims at least once per week, many daily, using more than one method.
- 78% of stalkers use more than one tactic.
- Weapons are used to harm or threaten victims in 1 out of 5 cases.
- Almost 1 in 3 of stalkers have stalked before.
- Intimate partner stalkers are the most likely stalkers to approach, threaten, and harm their victims.

STALKING LAWS

- Stalking is a crime under the laws of the 50 states, District of Columbia, U.S. Territories, and Federal government.
- Fewer than 1/3 of states classify stalking as a felony in all circumstances, including on the first offense.
- More than 1/2 of states classify stalking as a felony upon the second or subsequent offense, or when the crime involves aggravating factors.
- Aggravating factors may include: possession of a deadly weapon, violation of a court order or condition of probation/parole, victim under 16 years, or same victim as prior occasions.

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This project was supported by Grant No. 2017-TA-AX-K074 awarded by the Office on Violence Against Women, U.S. Department of Justice. The opinions, findings, conclusions, and recommendations expressed in this publication/program/exhibition are those of the author(s) and do not necessarily reflect the views of the Department of Justice, Office on Violence Against Women.

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STALKING FACT SHEET

Citations

[A] Smith, S.G., Basile, K.C., & Kresnow, M. (2022). The National Intimate Partner and Sexual Violence Survey (NISVS): 2016/2017 Report on Stalking. Atlanta, GA: National Center for Injury Prevention and Control, Centers for Disease control and Prevention.

[B] Ibid.

[C] Ibid.

[D] Ibid.

[E] Ibid.

[F] Catalano, S., Smith, E., Snyder, H. & Rand, M. (2009). Bureau of Justice Statistics selected findings: Female victims of violence. Retrieved from http://www.bjs. gov/content/pub/pdf/fvv.pdf.

[G] Smith, S.G., Basile, K.C., & Kresnow, M. (2022). The National Intimate Partner and Sexual Violence Survey (NISVS): 2016/2017 Report on Stalking. Atlanta, GA: National Center for Injury Prevention and Control, Centers for Disease control and Prevention.

[H] Baum, K., Catalano, S., & Rand, M. (2009). Stalking Victimization in the United States. Washington, DC: Bureau of Justice Statistics.

[I] Ibid.

[J] Truman, J.L., & Morgan, R.E. (2021). Stalking Victimization, 2016. Washington, DC: US DOJ, Bureau of Justice Statistics, Special Report.

[K] Baum, K., Catalano, S., & Rand, M. (2009). Stalking Victimization in the United States. Washington, DC: Bureau of Justice Statistics.

[L] Ibid.

[M] Ibid.

[N] Ibid.

[O] Blaauw, E., Arensman, E., Winkel, F.W., Freeve, A., & Sheridan, L. (2002). The Toll of Stalking. *Journal of Interpersonal Violence 17*(1): 50-63.

[P] Mohandie, K., Meloy, J.R., McGowan, M.G., & Williams, J. (2006). The RECON Typology of Stalking: Reliability and Validity Based upon a Large Sample of North American Stalkers. *Journal of Forensic Sciences, 51*(1): 147-155.

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