



LIFT

Community Action Agency, Inc.

Board of Directors Meeting

OCTOBER 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, October 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unless and except for any item which any one of the Board desires to have discussion about at the meeting or withdrawn from the Consent Docket and handled individually in order immediately following the completion of the Consent Docket.*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.** Vote to Approve September 2025 Regular Meeting Minutes (*Organizational Standard 5.5*)
- E.** Vote to Approve August 2025 Financial Reports; Distribution of September 2025 Financials for December 2025 Consideration and Vote (*OS 8.7*)
- F.** Vote to Approve Submission of Resolutions/Grant Applications – **\$52,000**
 - 1. 2025 Hometown Grant Application to T-Mobile - **\$50,000**
 - 2. FY 2025 Rural Advisory Council Travel Request to NeighborWorks® America - **\$2,000**
- G.** Vote to Approve Acceptance of Grants/Contracts/Awards – **\$471,951.53**
 - 1. FY 2026 Base Grant Award from Oklahoma Court Appointed Special Advocates (CASA) Association - **\$30,680.97**
 - 2. Strategies to Reduce Food Insecurity Pilot Project Contract Award from Oklahoma State Department of Health - **\$20,000**
 - 3. FY 2026 State Domestic Violence/Sexual Assault Services Funding Contract Award from Oklahoma Office of Attorney General - **\$227,245**
 - 4. Community Event Grant Award from Potts Family Foundation - **\$638.40**
 - 5. Local Giving Award (Holiday Food Baskets) from International Paper, Valliant Mill - **\$2,000**
 - 6. FY 2025 Flexible Impact Grant Award (3rd & 4th Allocations) from NeighborWorks® America - **\$132,000** (*Total Awarded: \$284,000*)
 - 7. FY 2025 Rural Advisory Council Travel Stipend from NeighborWorks® America - **\$2,000**
 - 8. Rx for Oklahoma Award (3rd Allocation) from KI BOIS Community Action Foundation, Inc. - **\$4,887.16** (*Total Awarded: \$18,447.48*)
 - 9. Preschool Development Grant Birth Through Five Parent and Family Engagement Award from Oklahoma Partnership for School Readiness Foundation, Inc. - **\$52,500**
- H.** Consideration and Possible Action to Enter into Executive Session to Review/Discuss the Following Items (*Oklahoma Statute Title 25 § 307(B)(1)*):
 - 1. Executive and Personnel Committee's Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director (*OS 7.4*)
 - 2. Employment Contract Renewal and Compensation of Rebecca (Reynolds) Porter as Executive Director of LIFT CAA (*OS 7.5*)

- I.** Consideration and Possible Action to Adjourn Out of Executive Session and the Regular Board Meeting Be Reconvened
- J.** Consideration and Possible Action to Approve the Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director (OS 7.4)
- K.** Consideration and Possible Action to Approve the Renewal of Contract, Employment, and Compensation of Rebecca (Reynolds) Porter as LIFT CAA Executive Director (OS 7.5)
- L.** Consideration and Possible Action on Filing of LIFT CAA 2024 Form 990 and Oklahoma Tax Return (OS 8.6)
- M.** Consideration and Possible Action to Approve Board Resolution Authorizing Executive Director to Conduct Business on Behalf of LIFT CAA
- N.** Consideration and Possible Action to Remove Johnny Moffitt as an Authorized Check Signer for LIFT Community Action Agency, Inc.
- O.** Consideration and Possible Action to Approve Kinsey Cox as an Authorized Check Signer for LIFT Community Action Agency, Inc.
- P.** Consideration and Possible Action to Approve LIFT CAA Board of Directors Regular Meeting Dates for 2026 (OS 5.5)
- Q.** Consideration and Possible Action to Approve Policy Council Operating Procedures and Conflict Resolution/Impasse Policy
- R.** Consideration and Possible Action to Approve Victim Services Programs Policies and Procedures Manual (OS 5.7)
- S.** Strategic Planning/Board Member Input and Participation: SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis (OS 6.1-6.5)
- T.** Board Training: Board Self-Assessment (OS 5.7)
- U.** Policy Council Report (OS 2.1 & 5.9)
- V.** Recognition of October 2025 Employee of the Month:
John Frelove, Driver – Transit Program
- W.** Recognition of Service Awards
 - Five Years:* Rhonda Collins, Transit Clerk – Transit Program
 - Ten Years:* Melissa Allen, Site Supervisor/Family Advocate – Head Start Program
 - Fifteen Years:* Kenneth Wallace, Computer Support Technician – Administration
 - Twenty-Five Years:* Sheree Ensley, Fiscal Officer – Administration
- X.** Other Reports/Announcements/Correspondence: Head Start Programs Monthly Reports (Program Summary, Communication and Guidance, Enrollment/Attendance, Meals/Snack, Data Analysis); Head Start Awareness Month; Domestic Violence Awareness Month (OS 5.9)

Y. Consideration and Possible Action 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*)

Z. Vote to Adjourn

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

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

MINUTES
BOARD OF DIRECTORS MEETING
September 9, 2025
Head Start Administration Office - Hugo, Oklahoma

The Board of Directors of LIFT Community Action Agency, Inc. met in a regular meeting session on Tuesday, September 9, 2025 at 10:00 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 William Smith.

The Invocation was given by Board Member Brent Franks.

Roll Call was taken, and a quorum was established (18 Board Members present, 6 absent). The following Board Members were present at the meeting site: Colby Bryant, Brad Burgett, Brent Franks, Brad Gernand, Kristi Graham, Lori Greer, Andrea Henkel, Jordan Hill, Jia Johnson, Sharon Johnson, Sandra Meeks, Carolyn Pool, David Smith, William Smith, Jim Bob Sullivan, Vicky Wade, Debra Williams, and Craig Young. The following members were absent: Tami Barnes, Kevin Cory, Patsy Guess, David Hawkins, Vickie Leathers, and Consuelo Splawn. LIFT CAA employees and visitors present at the meeting site were: Kinsey Cox, Macy Self, Rebecca (Reynolds) Porter, Sheree Ensley, Rhonda Teague, Jeannie McMillin, Jordan Mack, Darla Galyon, Mattie McKee, Ashley Gaddy, Amber Garman, and Jayleigh Nelms. LIFT CAA employees and/or visitors present, appearing remotely via the Microsoft Teams communications platform included: Kathy James.

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

Sheree Ensley, Fiscal Officer, provided the Board with the Finance/Audit/Loan Committee Report. The Committee met on September 9, 2025 prior to the Board Meeting. The Committee received a status report on all active loans; there were no new loan applications to present. The Committee voted to recommend full Board approval of the agency's Financial Reports for July 2025. The Committee was presented with the August 2025 Financial Reports. There were no property updates.

CONSENT DOCKET ITEMS

CONSIDER APPROVAL OF MEETING MINUTES/FINANCIAL REPORTS

William Smith, Chairman, requested the Board's vote to approve the August 2025 Regular Meeting Minutes and the July 2025 Financial Reports; the August 2025 Financials were distributed for consideration and vote at the October 2025 Board Meeting (Organizational Standards 5.5 and 8.7). A motion was made by Brad Burgett and seconded by Brent Franks to approve the August 2025 Regular Meeting Minutes and July 2025 Financial Reports. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Items D & E).

CONSIDER SUBMISSION OF RESOLUTIONS/GRANT APPLICATIONS

William Smith, Chairman, requested the Board's vote to approve agency submission of Resolutions and Grant Applications, as follows:

1. Gable Grants Program Application (YouthBuild) to Lowe's Foundation in the amount of \$200,000; if awarded, the LIFT YouthBuild Program will use the funds to purchase materials (lumber, windows, doors, nails, flooring, drywall, etc.) and supplies necessary to build one 1,200 square foot single-family home, to be sold to a low-income family upon completion. Through this project, YouthBuild participants will gain valuable construction experience working under the supervision of the Construction Supervisor and skilled licensed contractors, with hands-on participation in every aspect of the home construction.
2. Preschool Development Grant Birth Through Five Parent and Family Engagement Application to Oklahoma Partnership for School Readiness in the amount of \$50,000; if awarded, LIFT CAA's Family Resource Center staff will take the lead to implement three community resource fairs, one in each county of the service area (Choctaw, McCurtain, and Pushmataha Counties). These resource fairs will be aimed at supporting families with young children, improving their understanding of the early childhood care and education mixed delivery system, and enhancing their access to quality programs, services, and workforce support.
3. Local Giving Request (Holiday Food Baskets) to International Paper, Valliant Mill in the amount of \$2,000; if awarded, this funding would be used to provide food baskets to needy families in the tri-county service area during the 2025 holiday season.
4. Choosing Childbirth Act Application (Year 2) to Oklahoma State Department of Health in the amount of \$800,000; if awarded, these funds will support continued operations of the tri-county Choosing Childbirth Program during the second year of the grant. This funding will support pregnant women and those who may become pregnant through the provision of direct and indirect services, with 120 women to be served during Year 2. Direct services include delivery of evidence-based curriculum, parenting education, case management, employment, transportation, housing, nutrition, and education assistance.
5. Community Event Grant Application to Potts Family Foundation in the amount of \$650; if awarded, these funds will be used to cover the cost of providing food for participants attending the Family Resource Center's "Understanding Your Child's IEP" training session held on August 20, 2025.
6. FY 2026 Family Violence Prevention and Services Act Grant Application to Oklahoma Office of Attorney General in the amount of \$10,247.38 (Match: \$2,049.48); if awarded, funding will be used to support LIFT CAA's Victim Services programs, staff, and their work to: prevent incidents of family violence, domestic violence, and dating violence; provide immediate shelter, supportive services, and access to community-based programs for victims of family violence, domestic violence, or dating violence, and their dependents; and provide specialized services for children exposed to family violence, domestic

violence, or dating violence, including victims who are members of underserved populations. LIFT CAA will be required to meet the matching requirements (not less than \$1 for every \$5 of Federal funds provided to the agency under the program funding), for a total of \$2,049.48.

7. Child and Adult Care Food Program Grant Application to Oklahoma Department of Education in the amount of \$2,061,466.49 (Head Start/Early Head Start – \$688,050; Early Learning Centers – \$118,865.24; CACFP – \$1,254,551.25); beginning with this program year, LIFT CAA will submit one joint CACFP Grant Application rather than three separate applications. This consolidated application will streamline the process while still allocating funding across the three distinct program areas, as follows:
 - Head Start/Early Head Start – if awarded, these funds (up to \$688,050), will be used to provide children enrolled in the agency’s Head Start or Early Head Start Programs with adequate nutritional meals appropriate for their age group. Meals include breakfast, snacks, and lunch. Funding will support food-related supplies and salaries for the Cooks needed for food service operations under the programs.
 - Early Learning Centers – if awarded, these funds (up to \$118,865.24), will be used to provide breakfast, lunch, and snacks to students of the Early Learning Centers in Antlers, Broken Bow, Hugo, and Idabel. Centers may be reimbursed for three meal services (two meals and one snack or two snacks and one meal) per student per day; funding will also support food service-related supplies and operations costs.
 - Child and Adult Care Food Program – if awarded, funding for Program Operations (\$174,551.25) will be used for training daycare home providers, site visits to monitor and assist these providers, and other operational needs of the program. In addition, up to \$1,080,000 will be used for food reimbursement claims filed by the participating daycare home providers within the 45 Oklahoma counties served by the program. These providers are reimbursed for meals and snacks being served to an estimated 3,000 children daily.

After discussion and Board Member input with regards to the applications presented, a motion was made by Jim Bob Sullivan and seconded by Jordan Hill to approve the submission of resolutions and/or grant applications in the amount of \$3,124,363.87 presented as listed on the Consent Docket. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item F).

CONSIDER ACCEPTANCE OF GRANTS/CONTRACTS/AWARDS

William Smith, Chairman, requested the Board’s vote to approve agency acceptance of Grants, Contracts, and Awards, as follows:

1. FY 2025 Healthy Start Initiative: Eliminating Disparities in Perinatal Health Grant Award (Year 12, 3rd Allocation) from Health Resources and Services Administration in the amount of \$312,324; this funding will be utilized during the second year of the five-year grant cycle to improve access to quality health care and services for women, infants, children, and families through outreach, care coordination, health education and linkage to health insurance; building healthy communities and ensuring ongoing, coordinated, comprehensive services are provided in the most efficient manner through effective service delivery; strengthening the health workforce, specifically those individuals responsible for providing direct services; and promoting and improving health equity by connecting with appropriate organizations. The total amount awarded for Year 12 is \$1,100,000.

2. 2025 Victims of Crime Act Grant Award (Court Appointed Special Advocates) from Oklahoma District Attorneys Council in the amount of \$14,420; the one-year VOCA grant would be used to provide salary support and associated expenses for LIFT CASA staff. Since the purpose of this grant program is to provide direct services to victims of crime, this funding will allow LIFT CASA to continue providing advocacy services for abused and neglected children within Choctaw, McCurtain, and Pushmataha Counties.
3. 2025 VOCA Grant Award (Victim Advocacy Services) from Oklahoma DAC in the amount of \$21,627; this funding will provide operational support (personnel and associated expenses) for the Victim Advocacy Services Program for a period of one year. The program provides enhanced, needed direct services to victims and their families; a Victim Services Coordinator assists victims of crime in Choctaw, McCurtain, and Pushmataha Counties through direct service provision/linking to resources that will serve the victim's physical, emotional, and basic needs.

A motion was made by Brad Burgett and seconded by Lori Greer to approve acceptance of grants, contracts, and awards in the amount of \$348,371 as presented and listed on the Consent Docket. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item G).

Mattie McKee, Head Start Programs Assistant Director, requested the Board's consideration and possible action on the 2025-2026 Mental Health Contract with Healing Hearts Counseling and Consulting, LLC. McKee explained that Healing Hearts Counseling and Consulting, LLC was selected through a bid process in alignment with the agency's financial and procurement policies. A motion was made by Craig Young and seconded by Jordan Hill to approve the 2025-2026 Mental Health Contract with Healing Hearts Counseling and Consulting, LLC. The roll call vote was as follows: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item H).

Mattie McKee, Head Start Programs Assistant Director, requested the Board's consideration and possible action on the 2025-2026 Head Start/Early Head Start Training and Technical Assistance Plan. The provision of technical assistance and training for the Head Start/Early Head Start Programs serves to improve program quality. Head Start/Early Head Start staff receive a combination of Pre-service and In-service training as well as various other training opportunities. Trainings provided are based on staff needs, self-assessment, new best practices, training needs assessment, individual professional development plans, and Head Start Performance Standards. In addition to program staff, the Training and Technical Assistance Plan also includes development opportunities for the Policy Council and Board of Directors. The proposed plan outlines how the \$59,260 (Head Start: \$39,956 EHS: \$19,304) allocated for training and technical assistance will be expended during the 2025-2026 program year. A motion was made by Jim Bob Sullivan and seconded by Jia Johnson to approve the 2025-2026 Head Start/Early Head Start Training and Technical Assistance Plan. The roll call vote was: Yes 16; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item I).

Mattie McKee, Head Start Programs Assistant Director, provided a Board Training/Programmatic Report over program compliance with Children's Internet Protection Act (CIPA) Cyberbullying Awareness (Organizational Standards 5.7 and 5.9). CIPA was signed into law on December 21, 2000, and requires recipients of federal technology funds to comply with

certain filtering and policy requirements. LIFT CAA will continue to utilize ProxEfence and DansGuardian as its filtering programs. These programs check for bad subjects, profanities, hate, and pornography then disallows if not suitable. LIFT CAA also uses Cyber Smart Lessons. LIFT CAA's Head Start/Early Head Start/EHS-Child Care Programs' Internet Safety policies address the following as required by CIPA: (a) access by minors to inappropriate matter on the Internet and World Wide Web; (b) the safety and security of minors when using electronic mail, chat rooms, and other forms of direct electronic communications; (c) unauthorized access, including so-called "hacking," and other unlawful activities by minors online; (d) unauthorized disclosure, use, and dissemination of personal information regarding minor; (e) measures designed to restrict minors' access to materials harmful to minors; and (f) educating minors about appropriate online behavior, including interacting with others on social networking websites and in chat rooms and cyberbullying awareness and response.

Darla Galyon, Head Start Programs Director, provided a Board Training/Programmatic Report over the Head Start, Early Head Start, and Early Head Start-Child Care Program Information Reports for 2024-2025 (Organizational Standards 5.7 and 5.9). A Program Information Report is required to be conducted annually for all Head Start and Early Head Start programs. The reports cover a range of topics from teacher qualifications to family needs to enrollment. These reports are used on a National level to survey programs and evaluate operations. Galyon provided a summary overview of each report and their use as a continuous quality improvement/assessment tool, then facilitated discussion with the Board concerning the reports. Galyon noted that this year's reports may appear slightly skewed due to the change in funded enrollment following the approval of the Change in Scope – Enrollment Reduction Amendments for the Head Start and EHS-Child Care Programs. She further explained that the updated funded enrollment figures will be reflected in future reports, ensuring greater accuracy in program data and performance comparisons moving forward.

Kinsey Cox, Administrative Assistant/CSBG Administrator/Public Relations Specialist, provided a Board Training on Results-Oriented Management and Accountability (Organizational Standard 5.7). Cox presented the training titled "ROMA for Boards Training Series – Introduction to Implementing the ROMA Cycle" from the Community Action Partnership. The training explained the ROMA framework and process, including how agencies use the ROMA Cycle to assess community needs, plan services, implement programs, track results, and evaluate outcomes to ensure continuous quality improvement. This training was part of the ROMA Principles and Practices for Community Action Agency Boards series, created by the Community Action Partnership's Organizational Standards Center of Excellence and funded by Office of Community Services, available through the online toolkit at: https://communityactionpartnership.com/publication_toolkit/roma-for-boards-training-series/.

Sheree Ensley, Fiscal Officer, provided a Board Training over LIFT CAA Finances (Organizational Standard 5.7). The training covered the following topics: Community Services Block Grant Organizational Standards – Fiscal Management; Financial Oversight – Overall Agency Fiscal Status, Procedures, Practices, Transactions; and Interpreting Financial Statements. Ensley used the August 2025 Financial Reports included in the Board Meeting Packet, along with the Category 8 Standards (Financial Operations and Oversight) from the Center of Excellence Developed CSBG Organizational Standards, for demonstration purposes during the presentation.

This allowed Board Members to review real-time data, see how these standards apply in practice, and better understand how to interpret key fiscal indicators and financial statements in the context of the agency's operations.

Rebecca (Reynolds) Porter, Executive Director, provided an update on the Board Self-Assessment. The agency is required to conduct this assessment every two years to evaluate the Board's functioning and effectiveness. Board Members complete a series of questions designed to "rate" their performance and identify opportunities for growth. Since the last assessment was completed in 2023, the process is being conducted again this year. The Self-Assessment was recently distributed to the Board via email, with a 30-day window provided for completion. Currently, there are nine who have not yet started the process. Once all responses are submitted, the results will be compiled and shared with the Board, and the Board Training Committee will develop a plan to address any areas identified as needing additional capacity building.

Andrea Henkel, Board Member, provided the Board Giving Report (Organizational Standard 5.7). Currently, six of the 24 seated Board Members have provided a monetary donation to the agency during 2025. 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 funding entities typically look at the year prior, by achieving 100% Board giving in 2025, LIFT is eligible to apply for funding in 2026.

Jeannie McMillin, Transit Director, provided the Board with the Transportation Advisory Council Report (Organizational Standard 5.9). The Transportation Advisory Council was established during the April 2021 Board Meeting for the Transit Program with regards to funding received from the Kiamichi Economic Development District of Oklahoma's Area Agency on Aging Division. These KEDDO funds help to fill a gap in transportation services for older Americans (60 years of age or older) who do not qualify for Medicaid, Tribal, or other free transportation services. The Transportation Advisory Council regularly convenes each quarter, with a primary purpose to inform agency leadership of the transportation needs of older Americans within their communities, and will serve an essential function in helping to identify and address transportation barriers, challenges, and resources. During the 17th meeting, held on September 9, 2025 prior to the Board Meeting, Advisory Council members were briefed on the service results so far. The Transit Program successfully expended all funding from the previous KEDDO contract period, and the new period is underway, with services being provided across all three counties. 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.

Kinsey Cox, Administrative Assistant/CSBG Administrator/Public Relations Specialist, presented the 2025 LIFT CAA Customer Satisfaction Report for the 2nd Quarter in accordance with CSBG Organizational Standards 1.3 and 6.4. The Customer Satisfaction Surveys are designed to allow customers an outlet for providing feedback. The Customer Satisfaction Surveys are completed by clients either online or in paper format after having inquired about or received a service through an agency-operated program. LIFT CAA analyzes these survey responses as an additional tool to determine overall effectiveness of programs. During the 2nd Quarter, a total of

12 surveys were collected. Of those, 53% were from Choctaw County and 47% from McCurtain County. The programs represented during the 2nd Quarter included Apartments and Weatherization. Of those responding, 100% were satisfied with regards to their satisfaction level for agency services received.

Mattie McKee, Head Start Programs Assistant Director, provided the Board with the Policy Council Report for the August 19, 2025 meeting (Organizational Standards 2.1 and 5.9).

Rebecca (Reynolds) Porter, Executive Director, recognized Ashley Gaddy (Outreach Specialist, Head Start Programs) as the September 2025 Employee of the Month.

Rebecca (Reynolds) Porter, Executive Director, recognized the following Service Award recipients: Five Years – Jayleigh Nelms (Community Consortium Coordinator/Evaluator, Healthy Start Program); Twenty-Five Years – Jeannie McMillin (Director, Transit Program).

William Smith, Chairman, presented the Other Reports/Announcements/Correspondence as follows: Head Start Programs Monthly Reports (Program Summary, Communication and Guidance, Enrollment/Attendance, Meals/Snack, Data Analysis); Notice of Head Start Transportation Waiver Approval (Organizational Standard 5.9). Additionally, Executive Director Rebecca (Reynolds) Porter and Associate Director Macy Self were recognized for recently earning their Certified Community Action Professional (CCAP) credentials, demonstrating their commitment to excellence in community action leadership.

There was no New Business brought before the Board.

William Smith, Chairman, requested the Board's vote to adjourn. A motion was made by Brad Burgett and seconded by Sandra Meeks to adjourn the regular meeting. The roll call vote was as follows: Yes 17; No 0; Abstain 0. The motion carried. Voting record is attached (Item W).

The Regular Meeting adjourned at 10:44 a.m.

Sandra Meeks, Secretary/Treasurer

10:00

Budget
Franks

Sullivan
Hill

Budget
Greer

Young
Hill

Sullivan
Johnson

	September 9, 2025	Present	Absent	DIE			F			G			H			I		
				Y	N	A	Y	N	A	Y	N	A	Y	N	A	Y	N	A
1	Tami Barnes		✓															
2	Colby Bryant	✓	✓															
3	Brad Burgett	✓		✓			✓			✓			✓			✓		
4	Kevin Cory		✓															
5	Brent Franks	✓		✓			✓			✓			✓			✓		
6	Brad Gernand	✓		✓			✓			✓			✓			✓		
7	Kristi Graham	✓		✓			✓			✓			✓			✓		
8	Lori Greer	✓		✓			✓			✓			✓			✓		
9	Patsy Guess		✓															
10	David Hawkins		✓															
11	Andrea Henkel	✓		✓			✓			✓			✓			✓		
12	Jordan Hill	✓		✓			✓			✓			✓			✓		
13	Jia Johnson	✓		✓			✓			✓			✓			✓		
14	Sharon Johnson	✓		✓			✓			✓			✓			✓		
15	Vickie Leathers		✓															
16	Sandra Meeks	✓		✓			✓			✓			✓			✓		
17	Carolyn Pool	✓		✓			✓			✓			✓			✓		
18	David Smith	✓		✓			✓			✓			✓			✓		
19	Consuelo Splawn		✓															
20	Jim Bob Sullivan	✓		✓			✓			✓			✓			✓		
21	Vicky Wade	✓		✓			✓			✓			✓			✓		
22	Debra Williams	✓		✓			✓			✓			✓			✓		
23	Craig Young	✓		✓			✓			✓			✓			✓		
24	William Smith	✓																
25																		
26																		
27																		

	September 9, 2025	Present	Absent	V			W											
				Y	N	A	Y	N	A	Y	N	A	Y	N	A	Y	N	A
1	Tami Barnes		✓															
2	Colby Bryant	✓					✓											
3	Brad Burgett	✓					✓											
4	Kevin Cory		✓															
5	Brent Franks	✓					✓											
6	Brad Gernand	✓					✓											
7	Kristi Graham	✓					✓											
8	Lori Greer	✓					✓											
9	Patsy Guess		✓															
10	David Hawkins		✓															
11	Andrea Henkel	✓					✓											
12	Jordan Hill	✓					✓											
13	Jia Johnson	✓					✓											
14	Sharon Johnson	✓					✓											
15	Vickie Leathers		✓															
16	Sandra Meeks	✓					✓											
17	Carolyn Pool	✓					✓											
18	David Smith	✓					✓											
19	Consuelo Splawn		✓															
20	Jim Bob Sullivan	✓					✓											
21	Vicky Wade	✓					✓											
22	Debra Williams	✓					✓											
23	Craig Young	✓					✓											
24	William Smith	✓																
25																		
26																		
27																		

Burgett
Meeks

B:44

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Comparative Balance Sheet
End of Sep 2025

FINANCIAL ROW	AMOUNT (AS OF SEP 2025)	COMPARISON AMOUNT (AS OF FY 2024)	VARIANCE	% VARIANCE
ASSETS				
Current Assets				
Bank				
1000 - Cash				
1010 - Checking Account	\$8,041,084.70	\$8,646,823.07	(\$605,738.37)	-7.01%
1020 - Payroll Account	\$532,440.98	\$9,316.68	\$523,124.30	5,614.92%
1021 - First United Accounts Payable	\$58,782.85	\$13,885.75	\$44,897.10	323.33%
1022 - First United TH Reserve	\$152,340.51	\$146,772.86	\$5,567.65	3.79%
1023 - First United General Escrow	\$138,487.56	\$178,390.15	(\$39,902.59)	-22.37%
1024 - First United Marina License	\$164.62	\$253.90	(\$89.28)	-35.16%
1025 - First United Deposit (PayPal)	\$2,446.85	\$2,115.20	\$331.65	15.68%
1028 - First United Unrestricted Funds CD	\$870,128.46	\$849,505.41	\$20,623.05	2.43%
1030 - Shamrock Bank - Clayton	\$1,872.44	\$1,854.10	\$18.34	0.99%
1040 - Petty Cash	\$735.00	\$835.00	(\$100.00)	-11.98%
1050 - McCurtain County National Bank	\$8,552.26	\$6,449.31	\$2,102.95	32.61%
1070 - Fund to Fund Allocation Transfers	(\$0.02)	\$0.00	(\$0.02)	0.00%
Total - 1000 - Cash	\$9,807,036.21	\$9,856,201.43	(\$49,165.22)	-0.50%
Total Bank	\$9,807,036.21	\$9,856,201.43	(\$49,165.22)	-0.50%
Accounts Receivable				
1100 - Receivables				
1105 - Accrued Acct Receivable	\$228,938.28	\$272,333.18	(\$43,394.90)	-15.93%
1110 - Accounts Receivable	\$433,227.19	\$730,563.21	(\$297,336.02)	-40.70%
1120 - Due From (A/R)	(\$362.96)	(\$362.96)	\$0.00	0.00%
Total - 1100 - Receivables	\$661,802.51	\$1,002,533.43	(\$340,730.92)	-33.99%
1300 - Other receivables				
1320 - Notes/loans receivable	\$282,077.02	\$334,632.06	(\$52,555.04)	-15.71%
1321 - Loans Receivable from Belmont	\$181,588.48	\$217,351.48	(\$35,763.00)	-16.45%
1322 - Loans Receivable from Clayton	\$241,751.53	\$227,561.53	\$14,190.00	6.24%
1323 - Loans Receivable rom Kiamichi	\$123,563.90	\$123,563.90	\$0.00	0.00%
1324 - Loans Receivable from SOCDC	\$522,001.57	\$522,001.57	\$0.00	0.00%
1326 - Loans Receivable from Rouleau House	\$41,967.74	\$51,909.76	(\$9,942.02)	-19.15%
1327 - Receivable - NW Capital from Building Funds	\$115,443.92	\$0.00	\$115,443.92	0.00%
Total - 1300 - Other receivables	\$1,508,394.16	\$1,477,020.30	\$31,373.86	2.12%
Total Accounts Receivable	\$2,170,196.67	\$2,479,553.73	(\$309,357.06)	-12.48%
Other Current Asset				
1400 - Other assets				
1500 - Investments	\$139,427.16	\$35,733.08	\$103,694.08	290.19%
1530 - Property/Lots held for Sale	\$375,516.35	\$375,516.35	\$0.00	0.00%
1599 - Undeposited Funds	\$734.60	\$468.35	\$266.25	56.85%
Total - 1500 - Investments	\$376,250.95	\$375,984.70	\$266.25	0.07%
NS097 - Interfund Due to /Due from	(\$738.73)	(\$738.73)	\$0.00	0.00%
Payroll Float	\$399,717.70	\$303,788.87	\$95,928.83	31.58%
Total Other Current Asset	\$914,657.08	\$714,767.92	\$199,889.16	27.97%
Total Current Assets	\$12,891,889.96	\$13,050,523.08	(\$158,633.12)	-1.22%
Fixed Assets				
1600 - Fixed operating assets				
1610 - Land	\$1,087,094.00	\$1,087,094.00	\$0.00	0.00%

FINANCIAL ROW	AMOUNT (AS OF SEP 2025)	COMPARISON AMOUNT (AS OF FY 2024)	VARIANCE	VARIANCE
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	\$1,046,791.74	\$1,046,791.74	\$0.00	0.00%
1650 - Vehicles	\$4,250,106.82	\$4,250,106.82	\$0.00	0.00%
Total - 1600 - Fixed operating assets	\$15,563,279.39	\$15,563,279.39	\$0.00	0.00%
1700 - Accum deprec - fixed operating assets				
1725 - Accum deprec - building	(\$5,745,780.99)	(\$5,745,780.99)	\$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	(\$19,501.30)	(\$19,501.30)	\$0.00	0.00%
1745 - Accum deprec - furn,fix,equip	(\$56,655.06)	(\$56,655.06)	\$0.00	0.00%
1755 - Accum deprec - vehicles	(\$245,150.94)	(\$245,150.94)	\$0.00	0.00%
Total - 1700 - Accum deprec - fixed operating assets	(\$8,139,729.11)	(\$8,139,729.11)	\$0.00	0.00%
Total Fixed Assets	\$7,423,550.28	\$7,423,550.28	\$0.00	0.00%
Other Assets				
1800 - Other Assets	\$31,834.84	\$31,834.84	\$0.00	0.00%
Total Other Assets	\$31,834.84	\$31,834.84	\$0.00	0.00%
Total ASSETS	\$20,347,275.08	\$20,505,908.20	(\$158,633.12)	-0.77%
Liabilities & Equity				
Current Liabilities				
Accounts Payable	(\$19,344.41)	(\$18,712.60)	(\$631.81)	3.38%
Other Current Liability	\$1,398,025.86	\$1,545,219.20	(\$147,193.34)	-9.53%
Total Current Liabilities	\$1,378,681.45	\$1,526,506.60	(\$147,825.15)	-9.68%
Long Term Liabilities				
2700 - Long-term notes & loans payable	\$15,846.10	\$16,329.09	(\$482.99)	-2.96%
Total Long Term Liabilities	\$15,846.10	\$16,329.09	(\$482.99)	-2.96%
Equity	\$18,952,747.53	\$18,963,072.51	(\$10,324.98)	-0.05%
Total Liabilities & Equity	\$20,347,275.08	\$20,505,908.20	(\$158,633.12)	-0.77%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Comparative Income Statement
From Jan 2025 to Sep 2025

FINANCIAL ROW	AMOUNT (JAN 2025 - SEP 2025)	COMPARATIVE AMOUNT (FY 2024)	VARIANCE	% VARIANCE
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$78,185.41	\$66,066.44	\$12,118.97	18.34%
4100 - Inkind Revenue	\$659,458.65	\$1,519,251.09	(\$859,792.44)	-56.59%
4200 - Miscellaneous Revenue	\$924,255.84	\$1,254,930.89	(\$330,675.05)	-26.35%
4400 - State Revenue	\$2,707,612.07	\$1,793,753.10	\$913,858.97	50.95%
4500 - Federal Revenue	\$11,132,302.41	\$15,332,653.05	(\$4,200,350.64)	-27.39%
4900 - Recoveries from Programs	\$2,881,621.74	\$3,993,852.84	(\$1,112,231.10)	-27.85%
5000 - Rental Revenue	\$686,181.75	\$756,661.79	(\$70,480.04)	-9.31%
5100 - Program Fee Revenue	\$1,029,680.32	\$1,522,032.67	(\$492,352.35)	-32.35%
5300 - Interest and Dividends	\$64,848.38	\$319,105.51	(\$254,257.13)	-79.68%
5400 - Revenue from other sources	\$1,172,138.79	\$1,681,254.64	(\$509,115.85)	-30.28%
5800 - Special Event	\$18,769.81	\$5,266.00	\$13,503.81	256.43%
Total - Income	\$21,355,055.17	\$28,244,828.02	(\$6,889,772.85)	-24.39%
Cost Of Sales				
8000 - Cost of Goods Sold	\$7,283.69	\$2,810.86	\$4,472.83	159.13%
Total - Cost Of Sales	\$7,283.69	\$2,810.86	\$4,472.83	159.13%
Gross Profit	\$21,347,771.48	\$28,242,017.16	(\$6,894,245.68)	-24.41%
Expense				
7000 - Grants, contracts, & direct assistance	\$807,133.40	\$1,770,162.16	(\$963,028.76)	-54.40%
7200 - Salaries & related expenses	\$8,819,667.53	\$12,510,254.57	(\$3,690,587.04)	-29.50%
7300 - Indirect Cost Pool Expense	\$1,284,686.58	\$2,176,494.77	(\$891,808.19)	-40.97%
7500 - Contract/Consultant Services	\$1,379,322.70	\$2,045,519.13	(\$666,196.43)	-32.57%
8100 - Non personnel expenses	\$878,932.24	\$1,205,980.27	(\$327,048.03)	-27.12%
8200 - Facility & equipment expenses	\$2,561,324.04	\$3,222,733.80	(\$661,409.76)	-20.52%
8300 - Travel & meetings expenses	\$456,041.96	\$640,446.09	(\$184,404.13)	-28.79%
8400 - Insurance Expense	\$1,706,537.06	\$2,235,204.58	(\$528,667.52)	-23.65%
8600 - Business expenses	\$0.00	\$1,704.01	(\$1,704.01)	-100.00%
8700 - Food Expenses	\$1,157,338.96	\$1,742,261.67	(\$584,922.71)	-33.57%
8800 - In-Kind Expenses	\$659,458.65	\$1,519,251.09	(\$859,792.44)	-56.59%
Total - Expense	\$19,710,443.12	\$29,070,012.14	(\$9,359,569.02)	-32.20%
Net Ordinary Income	\$1,637,328.36	(\$827,994.98)	\$2,465,323.34	-297.75%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$1,647,653.34	\$1,867,637.48	(\$219,984.14)	-11.78%
Total - Other Expense	\$1,647,653.34	\$1,867,637.48	(\$219,984.14)	-11.78%
Net Other Income	(\$1,647,653.34)	(\$1,867,637.48)	\$219,984.14	-11.78%
Net Income	(\$10,324.98)	(\$2,695,632.46)	\$2,685,307.48	-99.62%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Statement of Financial Position
End of Sep 2025

FINANCIAL ROW	AMOUNT
ASSETS	
Current Assets	
Bank	
1000 - Cash	
1010 - Checking Account	\$8,041,084.70
1020 - Payroll Account	\$532,440.98
1021 - First United Accounts Payable	\$58,782.85
1022 - First United TH Reserve	\$152,340.51
1023 - First United General Escrow	\$138,487.56
1024 - First United Marina License	\$164.62
1025 - First United Deposit (PayPal)	\$2,446.85
1028 - First United Unrestricted Funds CD	\$870,128.46
1030 - Shamrock Bank - Clayton	\$1,872.44
1040 - Petty Cash	\$735.00
1050 - McCurtain County National Bank	\$8,552.26
1070 - Fund to Fund Allocation Transfers	(\$0.02)
Total - 1000 - Cash	\$9,807,036.21
Total Bank	\$9,807,036.21
Accounts Receivable	
1100 - Receivables	
1105 - Accrued Acct Receivable	\$228,938.28
1110 - Accounts Receivable	\$433,227.19
1120 - Due From (A/R)	(\$362.96)
Total - 1100 - Receivables	\$661,802.51
1300 - Other receivables	
1320 - Notes/loans receivable	\$282,077.02
1321 - Loans Receivable from Belmont	\$181,588.48
1322 - Loans Receivable from Clayton	\$241,751.53
1323 - Loans Receivable rom Kiamichi	\$123,563.90
1324 - Loans Receivable from SOCDC	\$522,001.57
1326 - Loans Receivable from Rouleau House	\$41,967.74
1327 - Receivable - NW Capital from Building Funds	\$115,443.92
Total - 1300 - Other receivables	\$1,508,394.16
Total Accounts Receivable	\$2,170,196.67
Other Current Asset	
1400 - Other assets	
1450 - Prepaid Expenses	\$138,654.90
1465 - Advances Paid	\$772.26
Total - 1400 - Other assets	\$139,427.16
1500 - Investments	
1530 - Property/Lots held for Sale	\$375,516.35
1599 - Undeposited Funds	\$734.60
Total - 1500 - Investments	\$376,250.95
NS097 - Interfund Due to /Due from	(\$738.73)
Payroll Float	\$399,717.70
Total Other Current Asset	\$914,657.08
Total Current Assets	\$12,891,889.96
Fixed Assets	
1600 - Fixed operating assets	
1610 - Land	\$1,087,094.00
1620 - Buildings	\$7,056,276.04

FINANCIAL ROW

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Subsidiary

1630 - Leasehold Improvements	\$2,123,010.79
1640 - Computers & Equipment over \$5,000	\$1,046,791.74
1650 - Vehicles	\$4,250,106.82
Total - 1600 - Fixed operating assets	\$15,563,279.39
1700 - Accum deprec - fixed operating assets	
1725 - Accum deprec - building	(\$5,745,780.99)
1735 - Accum amort - leasehold improvements	(\$2,072,640.82)
1740 - Accum. Amortization Leases	(\$19,501.30)
1745 - Accum deprec - furn,fix,equip	(\$56,655.06)
1755 - Accum deprec - vehicles	(\$245,150.94)
Total - 1700 - Accum deprec - fixed operating assets	(\$8,139,729.11)
Total Fixed Assets	\$7,423,550.28
Other Assets	
1800 - Other Assets	
1810 - Right to Use Asset - Leases	\$31,847.83
1950 - Stale Dated Payables	(\$12.99)
Total - 1800 - Other Assets	\$31,834.84
Total Other Assets	\$31,834.84
Total ASSETS	\$20,347,275.08
Liabilities & Equity	
Current Liabilities	
Accounts Payable	(\$19,344.41)
Other Current Liability	\$1,398,025.86
Total Current Liabilities	\$1,378,681.45
Long Term Liabilities	
2700 - Long-term notes & loans payable	\$15,846.10
Total Long Term Liabilities	\$15,846.10
Equity	\$18,952,747.53
Total Liabilities & Equity	\$20,347,275.08

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Statement of Functional Expense
From Jan 2025 to Sep 2025

FINANCIAL ROW	- UNASSIGNED Amount	CAPITAL Amount	FUNDRAISING Amount	MANAGEMENT & GENERAL (ADMIN) Amount	OTHER Amount	PROGRAM SERVICES Amount	TOTAL Amount
Operating Activities							
Net Income	(\$376,674.57)	(\$40,745.69)	\$177.51	(\$212,933.03)	\$423.89	\$619,426.91	(\$10,324.98)
Adjustments to Net Income							
Accounts Receivable	\$297,336.02	(\$62,888.88)	\$0.00	\$0.00	\$0.00	\$74,909.92	\$309,357.06
Other Current Asset	\$78,483.82	(\$5,655.87)	\$0.00	(\$71,309.33)	\$0.00	(\$201,141.53)	(\$199,622.91)
Accounts Payable	(\$631.81)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	(\$631.81)
Sales Tax Payable	\$22,225.19	\$0.00	\$0.00	\$0.00	\$0.00	(\$20,820.59)	\$1,404.60
Other Current Liabilities	\$740,754.34	\$0.00	\$0.00	\$105,439.49	\$0.00	(\$994,791.77)	(\$148,597.94)
Total Adjustments to Net Income	\$1,138,167.56	(\$68,544.75)	\$0.00	\$34,130.16	\$0.00	(\$1,141,843.97)	(\$38,091.00)
Total Operating Activities	\$761,492.99	(\$109,290.44)	\$177.51	(\$178,802.87)	\$423.89	(\$522,417.06)	(\$48,415.98)
Financing Activities							
Long Term Liabilities	(\$482.77)	\$0.00	\$0.00	\$0.00	\$0.00	(\$0.22)	(\$482.99)
Total Financing Activities	(\$482.77)	\$0.00	\$0.00	\$0.00	\$0.00	(\$0.22)	(\$482.99)
Net Change in Cash for Period	\$761,010.22	(\$109,290.44)	\$177.51	(\$178,802.87)	\$423.89	(\$522,417.28)	(\$48,898.97)
Cash at Beginning of Period	\$34,347,005.17	\$3,494.00	\$1,731.28	(\$10,869,958.65)	\$765.43	(\$13,626,367.45)	\$9,856,669.78
Cash at End of Period	\$35,108,015.39	(\$105,796.44)	\$1,908.79	(\$11,048,761.52)	\$1,189.32	(\$14,148,784.73)	\$9,807,770.81

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Statement of Cash Flow
From Jan 2025 to Sep 2025

FINANCIAL ROW	AMOUNT
Operating Activities	
Net Income	(\$10,324.98)
Adjustments to Net Income	
Accounts Receivable	\$309,357.06
Other Current Asset	(\$199,622.91)
Accounts Payable	(\$631.81)
Sales Tax Payable	\$1,404.60
Other Current Liabilities	(\$148,597.94)
Total Adjustments to Net Income	(\$38,091.00)
Total Operating Activities	(\$48,415.98)
Financing Activities	
Long Term Liabilities	(\$482.99)
Total Financing Activities	(\$482.99)
Net Change in Cash for Period	(\$48,898.97)
Cash at Beginning of Period	\$9,856,669.78
Cash at End of Period	\$9,807,770.81

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Statement of Activity
From Jan 2025 to Sep 2025
Options: Activity Only

FINANCIAL ROW	- UNASSIGNED - WITH DONOR RESTRICTIONS Amount	WITHOUT DONOR RESTRICTIONS Amount	TOTAL Amount
Operating Activities			
Net Income	(\$7,493,582.69)	\$8,265.86	\$7,474,991.85 (\$10,324.98)
Adjustments to Net Income			
Accounts Receivable	\$297,336.02	\$0.00	\$12,021.04 \$309,357.06
Other Current Asset	\$272,929.25	\$0.00	(\$472,552.16) (\$199,622.91)
Accounts Payable	(\$631.81)	\$0.00	\$0.00 (\$631.81)
Sales Tax Payable	\$0.00	\$0.00	\$1,404.60 \$1,404.60
Other Current Liabilities	(\$62,722.71)	\$0.00	(\$85,875.23) (\$148,597.94)
Total Adjustments to Net Income	\$506,910.75	\$0.00	(\$545,001.75) (\$38,091.00)
Total Operating Activities	(\$6,986,671.94)	\$8,265.86	\$6,929,990.10 (\$48,415.98)
Financing Activities			
Long Term Liabilities	(\$482.77)	\$0.00	(\$0.22) (\$482.99)
Total Financing Activities	(\$482.77)	\$0.00	(\$0.22) (\$482.99)
Net Change in Cash for Period	(\$6,987,154.71)	\$8,265.86	\$6,929,989.88 (\$48,898.97)
Cash at Beginning of Period	\$3,861,739.37	\$0.00	\$5,994,930.41 \$9,856,669.78
Cash at End of Period	(\$3,125,415.34)	\$8,265.86	\$12,924,920.29 \$9,807,770.81

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Program Revenue by Month
Jul 2025, Q3 2025, Aug 2025, Sep 2025

Monthly distribution of Revenue by Restriction and Program

PROGRAM	JULY 2025	AUGUST 2025	SEPTEMBER 2025	TOTAL
Without Donor Restrictions				
HS -Head Start	\$534,669.37	\$274,063.60	\$120,341.42	\$929,074.39
Administration	\$474,478.10	\$399,099.29	\$387,774.76	\$1,261,352.15
Early Head Start Child Care	\$247,946.62	\$526.00	\$637.48	\$249,110.10
Early Learning Centers	\$98,120.72	\$77,520.47	\$72,504.23	\$248,145.42
TRANSIT	\$94,768.81	\$25,986.31	\$31,377.02	\$152,132.14
Housing	\$78,005.10	\$80,317.95	\$11,762.13	\$170,085.18
Economic Development (Lending)	\$2,542.80	(\$45,670.77)	\$77,551.81	\$34,423.84
Healthy Start	\$71,436.69			\$71,436.69
WRO			\$70,414.56	\$70,414.56
Apartments	\$62,724.65	\$57,277.51	\$58,201.95	\$178,204.11
State Park Operations	\$61,779.86	\$35,678.25	\$39,518.81	\$136,976.92
Youth Build	\$33,545.20	\$52,700.01	\$884.22	\$87,129.43
EHS -EARLY HEAD START	\$9,345.43	\$10,852.47	\$8,273.61	\$28,471.51
RSVP	\$8,530.58	\$864.95	\$1,094.96	\$10,490.49
Tri-CORPS	\$4,171.92	\$390.00		\$4,561.92
Community Services	\$20.72		\$2,025.00	\$2,045.72
VOCA	\$163.75			\$163.75
- Unassigned -		\$162.00		\$162.00
CASA	\$68.18	\$150.00		\$218.18
RX		\$130.99		\$130.99
Mentoring	\$45.25			\$45.25
Second Chance	\$6.58			\$6.58
Emergency Services	\$2.32			\$2.32
Total - Without Donor Restrictions	\$1,782,372.65	\$970,049.03	\$882,361.96	\$3,634,783.64
- Unassigned -				
HS -Head Start	\$13,959.77	\$421,016.22	\$425,119.61	\$860,095.60
TMA	\$121,063.84	\$219,238.76		\$340,302.60
TRANSIT	\$136,649.61	\$60,886.73		\$197,536.34
CACFP - Daycare Homes		\$111,009.89	\$118,994.10	\$230,003.99
Tri-CORPS	\$16,173.00	\$24,811.00	\$112,331.00	\$153,315.00
Early Head Start Child Care		\$64,983.00	\$97,872.00	\$162,855.00
- Unassigned -			\$86,911.02	\$86,911.02
WRO	\$32,152.38		\$86,600.64	\$118,753.02
CORE Dad Program	\$41,927.78		\$81,308.52	\$123,236.30
Healthy Start		\$61,428.00	\$68,723.00	\$130,151.00
Choosing Childbirth	\$58,983.63		\$67,327.72	\$126,311.35
Weatherization	\$61,124.19	\$66,151.07		\$127,275.26
Youth Build		\$37,682.00	\$50,161.00	\$87,843.00
EHS -EARLY HEAD START	\$15,873.29	\$15,869.44		\$31,742.73
Community Services	\$10,125.66	\$14,643.96		\$24,769.62
Safe Place Healing Hearts	\$10,868.24	\$13,321.59		\$24,189.83
Second Chance	\$5,701.11	\$12,007.04		\$17,708.15
Early Learning Centers	\$4,591.99	\$10,184.78	\$9,952.55	\$24,729.32
State Park Operations	\$9,829.67	\$9,829.67		\$19,659.34
HEAD START / EARLY HEAD START	\$8,428.38	\$8,402.45		\$16,830.83
RSVP		\$6,123.00	\$7,218.00	\$13,341.00
VOCA	\$5,095.10	\$6,064.37		\$11,159.47
Mentoring	\$1,906.03	\$2,641.70		\$4,547.73
CASA	\$976.28	\$664.55	\$2,085.16	\$3,725.99
Housing	\$1,013.32	\$1,013.32		\$2,026.64

PROGRAM	JULY 2025	AUGUST 2025	SEPTEMBER 2025	Page 10 of 32
RX	\$821.00	\$821.00	\$690.01	\$2,332.01
Apartments		\$500.00		\$500.00
Total - Unassigned -	\$557,264.27	\$1,169,293.54	\$1,215,294.33	\$2,941,852.14
With Donor Restrictions				
HS -Head Start	\$2,514.20			\$2,514.20
Total - With Donor Restrictions	\$2,514.20			\$2,514.20
Total	\$2,342,151.12	\$2,139,342.57	\$2,097,656.29	\$6,579,149.98

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2025 to Adjust 2025
Options: Activity Only

Operating

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4200 - Miscellaneous Revenue	\$0.00	\$16,808.63	(\$16,808.63)	0.00%
4900 - Recoveries from Programs	\$2,139,501.00	\$2,881,613.32	(\$742,112.32)	134.69%
5000 - Rental Revenue	\$0.00	\$305,545.25	(\$305,545.25)	0.00%
5100 - Program Fee Revenue	\$0.00	(\$2,613.48)	\$2,613.48	0.00%
5300 - Interest and Dividends	\$0.00	\$67,969.87	(\$67,969.87)	0.00%
5400 - Revenue from other sources	\$0.00	\$339,890.91	(\$339,890.91)	0.00%
5800 - Special Event	\$0.00	\$63.00	(\$63.00)	0.00%
Total - Income	\$2,139,501.00	\$3,609,277.50	(\$1,469,776.50)	168.70%
Gross Profit	\$2,139,501.00	\$3,609,277.50	(\$1,469,776.50)	168.70%
Expense				
7000 - Grants, contracts, & direct assistance	\$0.00	\$2,890.91	(\$2,890.91)	0.00%
7200 - Salaries & related expenses	\$1,507,742.15	\$689,394.84	\$818,347.31	45.72%
7300 - Indirect Cost Pool Expense	\$0.00	\$14,380.23	(\$14,380.23)	0.00%
7500 - Contract/Consultant Services	\$125,000.00	\$335,505.55	(\$210,505.55)	268.40%
8100 - Non personnel expenses	\$64,740.65	\$53,807.55	\$10,933.10	83.11%
8200 - Facility & equipment expenses	\$41,709.95	\$276,190.62	(\$234,480.67)	662.17%
8300 - Travel & meetings expenses	\$41,000.00	\$35,560.10	\$5,439.90	86.73%
8400 - Insurance Expense	\$80,000.00	\$1,308,751.56	(\$1,228,751.56)	1,635.94%
8700 - Food Expenses	\$0.00	\$6,954.28	(\$6,954.28)	0.00%
Total - Expense	\$1,860,192.75	\$2,723,435.64	(\$863,242.89)	146.41%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$279,308.25	\$164,387.57	\$114,920.68	58.86%
Total - Other Expense	\$279,308.25	\$164,387.57	\$114,920.68	58.86%
Net Income	\$0.00	\$721,454.29	(\$721,454.29)	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Lift Income/Expense Statement Summary
From Jan 2025 to Sep 2025

FINANCIAL ROW	Administration Amount	10 OPERATING Building Funds Amount	Total Amount
Income			
Income			
4200 - Miscellaneous Revenue	\$16,756.48	\$52.15	\$16,808.63
4900 - Recoveries from Programs	\$2,881,613.32	\$0.00	\$2,881,613.32
5000 - Rental Revenue	\$0.00	\$305,545.25	\$305,545.25
5100 - Program Fee Revenue	\$0.00	(\$3,142.26)	(\$3,142.26)
5300 - Interest and Dividends	\$67,358.68	\$577.10	\$67,935.78
5400 - Revenue from other sources	\$327,890.91	\$0.00	\$327,890.91
Total - Income	\$3,293,619.39	\$303,032.24	\$3,596,651.63
Total Income	\$3,293,619.39	\$303,032.24	\$3,596,651.63
Expense			
Expense			
7000 - Grants, contracts, & direct assistance	\$2,890.91	\$0.00	\$2,890.91
7200 - Salaries & related expenses	\$647,461.48	\$0.00	\$647,461.48
7300 - Indirect Cost Pool Expense	\$14,380.23	\$0.00	\$14,380.23
7500 - Contract/Consultant Services	\$254,888.21	\$76,156.59	\$331,044.80
8100 - Non personnel expenses	\$42,086.84	\$10,530.39	\$52,617.23
8200 - Facility & equipment expenses	\$61,253.07	\$213,886.34	\$275,139.41
8300 - Travel & meetings expenses	\$35,066.60	\$177.10	\$35,243.70
8400 - Insurance Expense	\$1,218,406.20	\$90,383.18	\$1,308,789.38
8700 - Food Expenses	\$6,897.08	\$0.00	\$6,897.08
Other Expense			
8500 - Other Expense	\$159,827.20	\$1,996.60	\$161,823.80
Total Expense	\$2,443,157.82	\$393,130.20	\$2,836,288.02
Gross	\$850,461.57	(\$90,097.96)	\$760,363.61

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2025 to Adjust 2025
Options: Activity Only

Early Childhood

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$4,000.00	\$4,638.40	(\$638.40)	115.96%
4100 - Inkind Revenue	\$1,316,864.57	\$587,134.23	\$729,730.34	44.59%
4200 - Miscellaneous Revenue	\$0.00	\$653,235.80	(\$653,235.80)	0.00%
4400 - State Revenue	\$209,979.05	\$182,113.28	\$27,865.77	86.73%
4500 - Federal Revenue	\$6,882,362.00	\$6,451,736.03	\$430,625.97	93.74%
5100 - Program Fee Revenue	\$0.00	\$342,715.10	(\$342,715.10)	0.00%
5300 - Interest and Dividends	\$0.00	\$11,131.50	(\$11,131.50)	0.00%
5400 - Revenue from other sources	\$0.00	\$300,000.00	(\$300,000.00)	0.00%
Total - Income	\$8,413,205.62	\$8,532,704.34	(\$119,498.72)	101.42%
Gross Profit	\$8,413,205.62	\$8,532,704.34	(\$119,498.72)	101.42%
Expense				
7200 - Salaries & related expenses	\$4,648,348.31	\$4,162,719.19	\$485,629.12	89.55%
7300 - Indirect Cost Pool Expense	\$873,729.80	\$708,436.05	\$165,293.75	81.08%
7500 - Contract/Consultant Services	\$1,107,775.00	\$715,840.98	\$391,934.02	64.62%
8100 - Non personnel expenses	\$155,605.16	\$387,716.60	(\$232,111.44)	249.17%
8200 - Facility & equipment expenses	\$121,906.20	\$246,665.11	(\$124,758.91)	202.34%
8300 - Travel & meetings expenses	\$46,277.15	\$84,387.12	(\$38,109.97)	182.35%
8400 - Insurance Expense	\$44,175.00	\$127,618.83	(\$83,443.83)	288.89%
8700 - Food Expenses	\$72,137.00	\$415,224.27	(\$343,087.27)	575.61%
8800 - In-Kind Expenses	\$1,316,864.57	\$587,134.23	\$729,730.34	44.59%
Total - Expense	\$8,386,818.19	\$7,435,742.38	\$951,075.81	88.66%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$189,619.00	\$520,860.39	(\$331,241.39)	274.69%
Total - Other Expense	\$189,619.00	\$520,860.39	(\$331,241.39)	274.69%
Net Income	(\$163,231.57)	\$576,101.57	(\$739,333.14)	-352.94%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Lift Income/Expense Statement Summary
From Jan 2025 to Sep 2025

FINANCIAL ROW

	Amount	CACFP - Daycare Homes Amount	CC EHS -Early Head Start CC Amount	20 EARLY CHILDHOOD Early Learning Centers Amount		HS/EHS Amount		Total Amount	Total Amount
Income									
Income									
4000 - Contribution Revenue	\$0.00	\$0.00	\$0.00	\$4,000.00	\$638.40	\$0.00	\$0.00	\$638.40	\$4,638.40
4100 - Inkind Revenue	\$0.00	\$0.00	\$6,059.01	\$4,060.00	\$259,030.07	\$61,402.32	\$256,582.83	\$577,015.22	\$587,134.23
4200 - Miscellaneous Revenue	\$0.00	\$0.00	\$0.00	\$328,427.30	\$247,906.09	\$0.00	\$76,428.23	\$324,334.32	\$652,761.62
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$31,742.73	\$87,428.58	\$62,941.97	\$182,113.28	\$182,113.28
4500 - Federal Revenue	\$0.00	\$934,874.83	\$1,677,578.00	\$47,796.46	\$1,229,623.60	\$452,613.00	\$2,109,250.14	\$3,791,486.74	\$6,451,736.03
5100 - Program Fee Revenue	\$0.00	\$0.00	\$0.00	\$338,071.70	\$0.00	\$0.00	\$0.00	\$0.00	\$338,071.70
5300 - Interest and Dividends	\$0.00	\$0.00	\$0.00	\$6,378.82	\$4,680.45	\$0.00	\$72.23	\$4,752.68	\$11,131.50
5400 - Revenue from other sources	\$0.00	\$0.00	\$0.00	\$0.00	\$300,000.00	\$0.00	\$0.00	\$300,000.00	\$300,000.00
Total - Income	\$0.00	\$934,874.83	\$1,683,637.01	\$728,734.28	\$2,073,621.34	\$601,443.90	\$2,505,275.40	\$5,180,340.64	\$8,527,586.76
Total Income	\$0.00	\$934,874.83	\$1,683,637.01	\$728,734.28	\$2,073,621.34	\$601,443.90	\$2,505,275.40	\$5,180,340.64	\$8,527,586.76
Expense									
Expense									
7200 - Salaries & related expenses	\$93,057.79	\$75,130.22	\$291,098.38	\$550,484.89	\$787,080.14	\$688,837.67	\$1,439,897.96	\$2,915,815.77	\$3,925,587.05
7300 - Indirect Cost Pool Expense	\$17,972.18	\$12,164.63	\$39,252.17	\$88,139.65	\$96,150.76	\$141,991.34	\$270,830.50	\$508,972.60	\$666,501.23
7500 - Contract/Consultant Services	\$0.00	\$639.58	\$552,556.81	\$5,205.58	\$127,026.72	\$5,248.59	\$23,663.69	\$155,939.00	\$714,340.97
8100 - Non personnel expenses	\$1,421.10	\$13,081.65	\$123,246.82	\$26,155.20	\$66,190.69	\$33,794.83	\$114,867.59	\$214,853.11	\$378,757.88
8200 - Facility & equipment expenses	\$0.00	\$3,366.00	\$24,714.87	\$19,653.47	\$116,332.30	\$19,624.83	\$62,815.26	\$198,772.39	\$246,506.73
8300 - Travel & meetings expenses	\$0.00	\$23,232.26	\$14,904.13	\$3,089.93	\$12,409.02	\$7,463.26	\$23,176.84	\$43,049.12	\$84,275.44
8400 - Insurance Expense	\$0.00	\$0.00	\$24,999.25	\$16,986.40	(\$4,525.82)	\$19,088.77	\$71,070.23	\$85,633.18	\$127,618.83
8700 - Food Expenses	\$0.00	\$3,094.95	\$543.78	\$73,816.76	\$174,269.40	\$7,360.63	\$151,342.88	\$332,972.91	\$410,428.40
8800 - In-Kind Expenses	\$0.00	\$0.00	\$6,059.01	\$4,060.00	\$259,030.07	\$61,402.32	\$256,582.83	\$577,015.22	\$587,134.23
Other Expense									
8500 - Other Expense	\$260.74	\$4,792.71	\$294,857.96	\$4,322.93	\$92,670.96	\$28,724.26	\$95,230.83	\$216,626.05	\$520,860.39
Total Expense	\$112,711.81	\$135,502.00	\$1,372,233.18	\$791,914.81	\$1,726,634.24	\$1,013,536.50	\$2,509,478.61	\$5,249,649.35	\$7,662,011.15
Gross	(\$112,711.81)	\$799,372.83	\$311,403.83	(\$63,180.53)	\$346,987.10	(\$412,092.60)	(\$4,203.21)	(\$69,308.71)	\$865,575.61

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2025 to Adjust 2025
Options: Activity Only

Community Service

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$47,000.00	\$62,480.60	(\$15,480.60)	132.94%
4100 - Inkind Revenue	\$11,900.00	\$72,324.42	(\$60,424.42)	607.77%
4200 - Miscellaneous Revenue	\$0.00	\$2,308.39	(\$2,308.39)	0.00%
4400 - State Revenue	\$2,832,904.96	\$1,378,530.96	\$1,454,374.00	48.66%
4500 - Federal Revenue	\$2,365,673.00	\$2,085,210.54	\$280,462.46	88.14%
5100 - Program Fee Revenue	\$0.00	\$90.00	(\$90.00)	0.00%
5300 - Interest and Dividends	\$0.00	\$814.78	(\$814.78)	0.00%
5400 - Revenue from other sources	\$0.00	\$25,376.00	(\$25,376.00)	0.00%
5800 - Special Event	\$0.00	\$7,312.65	(\$7,312.65)	0.00%
Total - Income	\$5,257,477.96	\$3,634,448.34	\$1,623,029.62	69.13%
Gross Profit	\$5,257,477.96	\$3,634,448.34	\$1,623,029.62	69.13%
Expense				
7000 - Grants, contracts, & direct assistance	\$115,192.00	\$60,508.41	\$54,683.59	52.53%
7200 - Salaries & related expenses	\$2,324,918.63	\$1,879,661.20	\$445,257.43	80.85%
7300 - Indirect Cost Pool Expense	\$407,668.60	\$299,974.01	\$107,694.59	73.58%
7500 - Contract/Consultant Services	\$682,469.46	\$159,548.25	\$522,921.21	23.38%
8100 - Non personnel expenses	\$430,926.66	\$286,609.59	\$144,317.07	66.51%
8200 - Facility & equipment expenses	\$255,479.48	\$213,007.77	\$42,471.71	83.38%
8300 - Travel & meetings expenses	\$203,215.67	\$109,049.75	\$94,165.92	53.66%
8400 - Insurance Expense	\$2,430.00	\$8,831.48	(\$6,401.48)	363.44%
8700 - Food Expenses	\$64,558.00	\$25,923.59	\$38,634.41	40.16%
8800 - In-Kind Expenses	\$11,900.00	\$72,324.42	(\$60,424.42)	607.77%
Total - Expense	\$4,498,758.50	\$3,115,438.47	\$1,383,320.03	69.25%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$789,041.75	\$618,674.08	\$170,367.67	78.41%
Total - Other Expense	\$789,041.75	\$618,674.08	\$170,367.67	78.41%
Net Income	(\$30,322.29)	(\$99,664.21)	\$69,341.92	328.68%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Lift Income/Expense Statement Summary
From Jan 2025 to Sep 2025

FINANCIAL ROW	30 COMMUNITY SERVICE																		
	Amount	CORE DAD Amount	Choosing Childbirth Amount	Community Services Amount	Emergency Services Amount	Healthy Start Amount	Mentoring Amount	RCOR TRI- CORP Amount	RSVP Amount	RX Amount	Second Chance Amount	Amount	CASA Amount	Victim Services Safe Place Healing Hearts Amount	VOCA Amount	Total Amount	WORK READY OK Amount	Youth Build Amount	Total Amount
Income																			
Income																			
4000 - Contribution Revenue	\$0.00	\$0.00	\$0.00	\$7,045.94	\$10.00	\$0.00	\$5.00	\$34,040.00	\$1,060.00	\$0.00	\$0.00	\$154.41	\$0.00	\$0.00	\$0.00	\$154.41	\$0.00	\$20,165.25	\$82,480.60
4100 - In-kind Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,852.07	\$0.00	\$0.00	\$2,016.54	\$0.00	\$0.00	\$0.00	\$2,016.54	\$0.00	\$64,455.81	\$72,324.42
4200 - Miscellaneous Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$400.00	\$0.00	\$0.00	\$400.00	\$0.00	\$1,908.39	\$2,308.39
4400 - State Revenue	\$0.00	\$132,262.75	\$187,927.27	\$513,642.44	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7,433.69	\$0.00	\$3,725.99	\$8,739.78	\$0.00	\$0.00	\$12,465.77	\$524,799.04	\$0.00	\$1,378,530.96
4500 - Federal Revenue	\$0.00	\$0.00	\$0.00	\$169,665.53	\$0.00	\$827,232.00	\$23,020.17	\$330,953.08	\$58,661.00	\$0.00	\$132,931.06	\$35,349.30	\$0.00	\$99,145.73	\$37,345.67	\$171,840.70	\$0.00	\$370,907.00	\$2,085,210.54
5100 - Program Fee Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$90.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$90.00
5300 - Interest and Dividends	\$22.32	\$0.00	\$0.00	\$20.34	\$5.79	\$13.24	\$101.57	\$81.11	\$0.00	\$0.00	\$15.99	\$231.93	\$86.73	\$0.00	\$177.33	\$495.99	\$0.00	\$58.43	\$814.78
5400 - Revenue from other sources	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$17,376.00	\$8,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$25,376.00
5800 - Special Event	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$876.73	\$1,041.83	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,127.09	\$7,045.65
Total - Income	\$22.32	\$132,262.75	\$187,927.27	\$690,374.25	\$15.79	\$827,245.24	\$23,126.74	\$383,416.92	\$74,614.90	\$7,433.69	\$132,947.05	\$41,478.17	\$9,226.51	\$99,145.73	\$37,523.00	\$187,373.41	\$524,799.04	\$462,621.97	\$3,634,181.34
Total Income	\$22.32	\$132,262.75	\$187,927.27	\$690,374.25	\$15.79	\$827,245.24	\$23,126.74	\$383,416.92	\$74,614.90	\$7,433.69	\$132,947.05	\$41,478.17	\$9,226.51	\$99,145.73	\$37,523.00	\$187,373.41	\$524,799.04	\$462,621.97	\$3,634,181.34
Expense																			
Expense																			
7000 - Grants, contracts, & direct assistance	\$0.00	\$1,257.78	\$5,146.84	\$40,766.63	\$1,200.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$627.85	\$0.00	\$5,178.32	\$592.24	\$6,398.41	\$0.00	\$5,738.75	\$60,508.41
7200 - Salaries & related expenses	\$132,364.35	\$62,795.23	\$67,976.12	\$383,328.91	\$0.00	\$401,545.63	\$16,633.77	\$162,726.27	\$44,712.63	\$5,083.15	\$80,116.08	(\$4,557.70)	\$0.00	\$89,541.39	\$80,079.24	\$165,162.93	\$65,755.48	\$181,527.15	\$1,769,727.70
7300 - Indirect Cost Pool Expense	\$25,865.39	\$7,463.63	\$13,269.20	\$70,367.47	\$0.00	\$74,637.67	\$2,202.00	\$25,249.04	\$5,949.02	\$1,020.74	\$8,359.57	(\$5,945.09)	\$40.69	\$17,485.22	\$15,096.07	\$26,676.89	\$11,843.28	\$7,666.54	\$280,570.44
7500 - Contract/Consultant Services	\$0.00	\$0.00	\$0.00	\$19,942.50	\$0.00	\$83,799.14	\$699.48	\$5,000.00	\$0.00	\$0.00	\$31,160.68	\$1,604.14	\$0.00	\$411.52	\$0.00	\$2,015.66	\$4,695.00	\$3,422.10	\$150,734.56
8100 - Non personnel expenses	\$903.78	\$7,722.85	\$6,674.36	\$69,794.38	\$0.00	\$23,443.45	\$2,762.39	\$51,043.75	\$1,336.41	\$0.00	(\$215.81)	\$1,499.35	\$2,525.95	\$1,289.28	\$527.30	\$5,841.88	\$71,839.41	\$42,056.72	\$283,203.57
8200 - Facility & equipment expenses	\$6,336.09	\$17,461.65	\$7,495.73	\$24,009.49	\$0.00	\$38,508.24	\$1,656.00	\$16,406.46	\$1,332.00	\$0.00	\$4,961.00	\$4,691.50	\$1,740.00	\$4,246.50	\$740.00	\$11,418.00	\$49,997.37	\$33,110.74	\$212,692.77
8300 - Travel & meetings expenses	\$0.00	\$2,092.80	\$2,364.60	\$16,802.19	\$0.00	\$26,365.81	\$316.40	\$5,578.20	\$2,252.80	\$79.80	\$9,977.34	\$5,578.55	\$5,178.18	\$4,366.46	\$667.90	\$15,791.09	\$7,107.70	\$20,282.22	\$109,010.75
8400 - Insurance Expense	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,324.00	\$1,814.48	\$0.00	\$882.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,811.00	\$5,831.48
8700 - Food Expenses	\$0.00	\$6,850.04	\$763.25	\$8,893.14	\$0.00	\$52.56	\$0.00	\$0.00	\$873.60	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8,475.22	\$15.78	\$25,923.58
8800 - In-Kind Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,852.07	\$0.00	\$0.00	\$2,016.54	\$0.00	\$0.00	\$0.00	\$2,016.54	\$0.00	\$64,455.81	\$72,324.42
Other Expense																			
8500 - Other Expense	\$8,922.08	\$65,182.35	\$64,824.02	\$97,211.86	\$40.00	\$119,691.80	\$2,601.69	\$13,158.53	\$2,105.20	\$1,250.00	\$6,595.82	\$2,748.70	\$38.00	\$799.38	\$29.85	\$3,616.93	\$138,477.85	\$90,845.81	\$614,523.94
Total Expense	\$174,391.69	\$170,826.33	\$168,514.12	\$731,116.57	\$1,240.00	\$768,044.30	\$26,871.73	\$280,486.25	\$66,228.01	\$7,433.69	\$141,836.68	\$8,264.84	\$9,522.82	\$123,418.07	\$97,732.60	\$238,938.33	\$358,191.31	\$453,932.62	\$3,588,051.63
Gross	(\$174,369.37)	(\$38,563.58)	\$19,413.15	(\$40,742.32)	(\$1,224.21)	\$59,200.94	(\$3,744.99)	\$102,930.67	\$8,386.89	\$0.00	(\$8,889.63)	\$33,213.33	(\$296.31)	(\$24,272.34)	(\$60,209.60)	(\$51,564.92)	\$166,607.73	\$8,689.35	\$46,129.71

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2025 to Adjust 2025
Options: Activity Only

Housing

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$7,000.00	\$7,000.00	\$0.00	100.00%
4200 - Miscellaneous Revenue	\$0.00	\$214,955.94	(\$214,955.94)	0.00%
4400 - State Revenue	\$1,186,270.00	\$868,541.49	\$317,728.51	73.22%
4500 - Federal Revenue	\$301,918.11	\$1,911,817.84	(\$1,609,899.73)	633.22%
5000 - Rental Revenue	\$0.00	\$403,267.00	(\$403,267.00)	0.00%
5100 - Program Fee Revenue	\$0.00	\$51,069.04	(\$51,069.04)	0.00%
5300 - Interest and Dividends	\$0.00	(\$32,247.54)	\$32,247.54	0.00%
5400 - Revenue from other sources	\$538,836.40	\$456,467.10	\$82,369.30	84.71%
Total - Income	\$2,034,024.51	\$3,880,870.87	(\$1,846,846.36)	190.80%
Gross Profit	\$2,034,024.51	\$3,880,870.87	(\$1,846,846.36)	190.80%
Expense				
7000 - Grants, contracts, & direct assistance	\$0.00	\$743,601.11	(\$743,601.11)	0.00%
7200 - Salaries & related expenses	\$146,452.00	\$927,379.99	(\$780,927.99)	633.23%
7300 - Indirect Cost Pool Expense	\$27,945.00	\$134,483.76	(\$106,538.76)	481.24%
7500 - Contract/Consultant Services	\$5,850.00	\$103,959.39	(\$98,109.39)	1,777.08%
8100 - Non personnel expenses	\$27,179.02	\$59,002.71	(\$31,823.69)	217.09%
8200 - Facility & equipment expenses	\$1,193,224.00	\$1,262,960.27	(\$69,736.27)	105.84%
8300 - Travel & meetings expenses	\$8,000.00	\$91,366.53	(\$83,366.53)	1,142.08%
8400 - Insurance Expense	\$6,750.00	\$107,539.36	(\$100,789.36)	1,593.18%
8600 - Business expenses	\$118,597.00	\$0.00	\$118,597.00	0.00%
8700 - Food Expenses	\$0.00	\$48.24	(\$48.24)	0.00%
Total - Expense	\$1,533,997.02	\$3,430,341.36	(\$1,896,344.34)	223.62%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$91,648.09	\$278,417.46	(\$186,769.37)	303.79%
Total - Other Expense	\$91,648.09	\$278,417.46	(\$186,769.37)	303.79%
Net Income	\$408,379.40	\$172,112.05	\$236,267.35	42.15%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Lift Income/Expense Statement Summary
From Jan 2025 to Sep 2025

FINANCIAL ROW

	Amount	Apartments Amount	Construction Amount	HUD Apartments (Lift) Amount	40 HOUSING DEPARTMENT Amount	Housing Weatherization Amount	Total Amount	Self Help Housing Amount	TMA Amount	Total Amount
Income										
Income										
4000 - Contribution Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$7,000.00	\$0.00	\$7,000.00	\$0.00	\$0.00	\$7,000.00
4200 - Miscellaneous Revenue	\$0.00	\$230.97	\$0.00	\$0.00	\$183,080.39	\$0.00	\$183,080.39	\$0.00	\$0.00	\$183,311.36
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$0.00	\$868,541.49	\$0.00	\$868,541.49	\$0.00	\$0.00	\$868,541.49
4500 - Federal Revenue	\$0.00	\$0.00	\$101,372.97	\$0.00	\$729,951.37	\$127,275.26	\$857,226.63	\$0.00	\$953,218.24	\$1,911,817.84
5000 - Rental Revenue	\$0.00	\$377,707.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$377,707.00
5100 - Program Fee Revenue	\$15.00	\$14,111.86	\$0.00	\$11,949.44	\$24,962.74	\$0.00	\$24,962.74	\$0.00	\$0.00	\$51,039.04
5300 - Interest and Dividends	\$53,156.00	(\$90,623.35)	\$0.00	\$0.00	\$5,219.81	\$0.00	\$5,219.81	\$0.00	\$0.00	(\$32,247.54)
5400 - Revenue from other sources	\$0.00	\$11,625.00	\$0.00	\$0.00	\$444,842.10	\$0.00	\$444,842.10	\$0.00	\$0.00	\$456,467.10
Total - Income	\$53,171.00	\$313,051.48	\$101,372.97	\$11,949.44	\$2,263,597.90	\$127,275.26	\$2,390,873.16	\$0.00	\$953,218.24	\$3,823,636.29
Total Income	\$53,171.00	\$313,051.48	\$101,372.97	\$11,949.44	\$2,263,597.90	\$127,275.26	\$2,390,873.16	\$0.00	\$953,218.24	\$3,823,636.29
Expense										
Expense										
7000 - Grants, contracts, & direct assistance	\$58,406.00	(\$85,830.79)	\$0.00	\$0.00	\$446,025.90	\$0.00	\$446,025.90	\$0.00	\$325,000.00	\$743,601.11
7200 - Salaries & related expenses	\$65,718.86	\$37,619.69	\$270,038.96	(\$109.44)	(\$40,146.69)	\$224,970.22	\$184,823.53	\$0.00	\$315,178.89	\$873,270.49
7300 - Indirect Cost Pool Expense	\$12,806.03	\$6,413.85	\$51,213.92	\$3,247.54	(\$20,208.65)	\$30,528.86	\$10,320.21	\$0.00	\$41,124.49	\$125,126.04
7500 - Contract/Consultant Services	\$0.00	\$41,537.22	\$15,947.65	\$0.00	\$43,809.53	\$1,200.00	\$45,009.53	\$0.00	\$0.00	\$102,494.40
8100 - Non personnel expenses	\$7.68	\$7,910.54	\$3,760.06	(\$7.43)	\$26,084.29	\$8,999.73	\$35,084.02	\$0.00	\$11,847.48	\$58,602.35
8200 - Facility & equipment expenses	\$0.00	\$173,213.01	\$5,708.18	\$0.00	\$1,049,848.24	\$8,059.53	\$1,057,907.77	\$0.00	\$26,100.00	\$1,262,928.96
8300 - Travel & meetings expenses	\$60.00	(\$1,576.71)	\$4,719.23	\$299.04	\$26,442.66	\$6,889.76	\$33,332.42	\$0.00	\$54,399.11	\$91,233.09
8400 - Insurance Expense	\$0.00	\$81,333.90	\$0.00	\$0.00	\$23,557.46	\$0.00	\$23,557.46	\$0.00	\$2,648.00	\$107,539.36
8700 - Food Expenses	\$0.00	\$0.00	\$0.00	\$0.00	\$48.24	\$0.00	\$48.24	\$0.00	\$0.00	\$48.24
Other Expense										
8500 - Other Expense	\$1,185.72	\$18,924.89	\$3,844.58	\$0.00	\$205,894.80	\$22,159.11	\$228,053.91	\$0.00	\$26,168.36	\$278,177.46
Total Expense	\$138,184.29	\$279,545.60	\$355,232.58	\$3,429.71	\$1,761,355.78	\$302,807.21	\$2,064,162.99	\$0.00	\$802,466.33	\$3,643,021.50
Gross	(\$85,013.29)	\$33,505.88	(\$253,859.61)	\$8,519.73	\$502,242.12	(\$175,531.95)	\$326,710.17	\$0.00	\$150,751.91	\$180,614.79

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2025 to Adjust 2025
Options: Activity Only

Transit

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4200 - Miscellaneous Revenue	\$54,340.50	\$67,051.05	(\$12,710.55)	123.39%
4400 - State Revenue	\$0.00	\$89,971.00	(\$89,971.00)	0.00%
4500 - Federal Revenue	\$307,929.50	\$608,538.00	(\$300,608.50)	197.62%
5000 - Rental Revenue	\$0.00	\$2,929.50	(\$2,929.50)	0.00%
5100 - Program Fee Revenue	\$0.00	\$269,376.20	(\$269,376.20)	0.00%
5300 - Interest and Dividends	\$0.00	\$441.86	(\$441.86)	0.00%
5400 - Revenue from other sources	\$0.00	\$54,180.73	(\$54,180.73)	0.00%
Total - Income	\$362,270.00	\$1,092,488.34	(\$730,218.34)	301.57%
Gross Profit	\$362,270.00	\$1,092,488.34	(\$730,218.34)	301.57%
Expense				
7200 - Salaries & related expenses	\$0.00	\$798,258.41	(\$798,258.41)	0.00%
7300 - Indirect Cost Pool Expense	\$0.00	\$123,372.55	(\$123,372.55)	0.00%
7500 - Contract/Consultant Services	\$0.00	\$12,806.91	(\$12,806.91)	0.00%
8100 - Non personnel expenses	\$0.00	\$40,021.53	(\$40,021.53)	0.00%
8200 - Facility & equipment expenses	\$362,270.00	\$35,070.78	\$327,199.22	9.68%
8300 - Travel & meetings expenses	\$0.00	\$124,156.73	(\$124,156.73)	0.00%
8400 - Insurance Expense	\$0.00	\$66,899.88	(\$66,899.88)	0.00%
Total - Expense	\$362,270.00	\$1,200,586.79	(\$838,316.79)	331.41%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$0.00	\$18,553.88	(\$18,553.88)	0.00%
Total - Other Expense	\$0.00	\$18,553.88	(\$18,553.88)	0.00%
Net Income	\$0.00	(\$126,652.33)	\$126,652.33	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Lift Income/Expense Statement Summary
From Jan 2025 to Sep 2025

FINANCIAL ROW

	Amount	50 TRANSPORTATION Transit Amount	Total Amount
Income			
Income			
4200 - Miscellaneous Revenue	\$0.00	\$67,051.05	\$67,051.05
4400 - State Revenue	\$0.00	\$89,971.00	\$89,971.00
4500 - Federal Revenue	\$0.00	\$608,538.00	\$608,538.00
5000 - Rental Revenue	\$0.00	\$2,929.50	\$2,929.50
5100 - Program Fee Revenue	\$8,920.20	\$258,423.45	\$267,343.65
5300 - Interest and Dividends	\$0.00	\$441.86	\$441.86
5400 - Revenue from other sources	\$0.00	\$54,180.73	\$54,180.73
Total - Income	\$8,920.20	\$1,081,535.59	\$1,090,455.79
Total Income	\$8,920.20	\$1,081,535.59	\$1,090,455.79
Expense			
Expense			
7200 - Salaries & related expenses	\$27,635.60	\$727,400.86	\$755,036.46
7300 - Indirect Cost Pool Expense	\$4,808.60	\$110,898.47	\$115,707.07
7500 - Contract/Consultant Services	\$0.00	\$12,043.79	\$12,043.79
8100 - Non personnel expenses	\$0.00	\$39,291.89	\$39,291.89
8200 - Facility & equipment expenses	\$0.00	\$35,070.78	\$35,070.78
8300 - Travel & meetings expenses	\$0.00	\$122,660.29	\$122,660.29
8400 - Insurance Expense	\$0.00	\$66,899.88	\$66,899.88
Other Expense			
8500 - Other Expense	\$0.00	\$18,553.88	\$18,553.88
Total Expense	\$32,444.20	\$1,132,819.84	\$1,165,264.04
Gross	(\$23,524.00)	(\$51,284.25)	(\$74,808.25)

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2025 to Adjust 2025

Options: Activity Only

Economic Development

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	\$0.00	\$576.41	(\$576.41)	0.00%
4200 - Miscellaneous Revenue	\$0.00	\$1,854.79	(\$1,854.79)	0.00%
4400 - State Revenue	\$0.00	\$78,637.32	(\$78,637.32)	0.00%
4500 - Federal Revenue	\$0.00	\$75,000.00	(\$75,000.00)	0.00%
5100 - Program Fee Revenue	\$0.00	\$386,855.28	(\$386,855.28)	0.00%
5300 - Interest and Dividends	\$0.00	\$17,970.37	(\$17,970.37)	0.00%
5400 - Revenue from other sources	\$0.00	\$8,360.74	(\$8,360.74)	0.00%
5800 - Special Event	\$0.00	\$11,524.16	(\$11,524.16)	0.00%
Total - Income	\$0.00	\$580,779.07	(\$580,779.07)	0.00%
Cost Of Sales				
8000 - Cost of Goods Sold	\$0.00	\$6,742.01	(\$6,742.01)	0.00%
Total - Cost Of Sales	\$0.00	\$6,742.01	(\$6,742.01)	0.00%
Gross Profit	\$0.00	\$574,037.06	(\$574,037.06)	0.00%
Expense				
7200 - Salaries & related expenses	\$0.00	\$273,671.41	(\$273,671.41)	0.00%
7300 - Indirect Cost Pool Expense	\$0.00	\$43,051.53	(\$43,051.53)	0.00%
7500 - Contract/Consultant Services	\$0.00	\$62,645.85	(\$62,645.85)	0.00%
8100 - Non personnel expenses	\$0.00	\$27,868.05	(\$27,868.05)	0.00%
8200 - Facility & equipment expenses	\$0.00	\$164,728.26	(\$164,728.26)	0.00%
8300 - Travel & meetings expenses	\$0.00	\$9,544.91	(\$9,544.91)	0.00%
8400 - Insurance Expense	\$0.00	\$83,967.80	(\$83,967.80)	0.00%
Total - Expense	\$0.00	\$665,477.81	(\$665,477.81)	0.00%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	\$0.00	\$46,698.51	(\$46,698.51)	0.00%
Total - Other Expense	\$0.00	\$46,698.51	(\$46,698.51)	0.00%
Net Income	\$0.00	(\$138,139.26)	\$138,139.26	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Lift Income/Expense Statement Summary
From Jan 2025 to Sep 2025

FINANCIAL ROW

	Economic Development/Lending			60 ECONOMIC DEVELOPMENT				Total	
	Amount	Lending Amount	Total Amount	Amount	Clayton Lake Amount	State Parks Hugo Lake Amount	Raymond Gary Amount	Total Amount	Total Amount
Income									
Income									
4000 - Contribution Revenue	\$0.00	\$0.00	\$0.00	\$574.84	\$1.56	\$0.00	\$0.01	\$576.41	\$576.41
4200 - Miscellaneous Revenue	\$0.00	\$0.00	\$0.00	\$1,854.79	\$0.00	\$0.00	\$0.00	\$1,854.79	\$1,854.79
4400 - State Revenue	\$0.00	\$0.00	\$0.00	\$19,659.34	\$28,515.00	\$0.00	\$30,462.98	\$78,637.32	\$78,637.32
4500 - Federal Revenue	\$75,000.00	\$0.00	\$75,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$75,000.00
5100 - Program Fee Revenue	(\$8,095.17)	\$0.00	(\$8,095.17)	\$287,652.45	\$25,728.97	\$21,272.30	\$47,733.01	\$382,386.73	\$374,291.56
5300 - Interest and Dividends	\$16,493.64	\$0.00	\$16,493.64	\$163.30	\$0.00	\$0.03	\$115.03	\$278.36	\$16,772.00
5400 - Revenue from other sources	\$1,183.80	\$0.00	\$1,183.80	\$6,612.78	\$85.00	\$43.61	\$298.86	\$7,040.25	\$8,224.05
5800 - Special Event	\$0.00	\$0.00	\$0.00	\$11,174.16	\$0.00	\$350.00	\$0.00	\$11,524.16	\$11,524.16
Total - Income	\$84,582.27	\$0.00	\$84,582.27	\$327,691.66	\$54,330.53	\$21,665.94	\$78,609.89	\$482,298.02	\$566,880.29
Total Income	\$84,582.27	\$0.00	\$84,582.27	\$327,691.66	\$54,330.53	\$21,665.94	\$78,609.89	\$482,298.02	\$566,880.29
Expense									
Expense									
7200 - Salaries & related expenses	\$0.00	(\$8,026.42)	(\$8,026.42)	\$16,269.00	\$41,901.55	\$153,094.23	\$48,842.83	\$260,107.61	\$252,081.19
7300 - Indirect Cost Pool Expense	\$0.00	\$2,652.44	\$2,652.44	(\$11,865.59)	\$8,077.28	\$30,600.23	\$9,739.41	\$36,551.33	\$39,203.77
7500 - Contract/Consultant Services	\$0.00	\$0.00	\$0.00	\$52,799.90	\$640.00	\$3,436.75	\$4,333.50	\$61,210.15	\$61,210.15
8100 - Non personnel expenses	\$0.00	(\$7.52)	(\$7.52)	\$19,574.01	\$3,520.71	\$1,419.13	\$2,975.98	\$27,489.83	\$27,482.31
8200 - Facility & equipment expenses	\$0.00	(\$725.00)	(\$725.00)	\$120,586.04	\$17,614.53	\$11,498.88	\$15,781.50	\$165,480.95	\$164,755.95
8300 - Travel & meetings expenses	\$0.00	(\$29.40)	(\$29.40)	\$3,658.47	\$236.60	\$1,552.31	\$4,083.68	\$9,531.06	\$9,501.66
8400 - Insurance Expense	\$0.00	\$0.00	\$0.00	\$72,603.90	\$4,089.51	\$0.00	\$7,274.39	\$83,967.80	\$83,967.80
Other Expense									
8500 - Other Expense	\$0.00	\$12.94	\$12.94	\$40,800.51	\$1,264.32	\$1,682.81	\$2,722.41	\$46,470.05	\$46,482.99
Total Expense	\$0.00	(\$6,122.96)	(\$6,122.96)	\$314,426.24	\$77,344.50	\$203,284.34	\$95,753.70	\$690,808.78	\$684,685.82
8000 - Cost of Goods Sold									
8010 - Resale Fuel Expense	\$0.00	\$0.00	\$0.00	\$4,031.91	\$0.00	\$544.35	\$0.00	\$4,576.26	\$4,576.26
8020 - Ship Store (Resale Inv)	\$0.00	\$0.00	\$0.00	\$1,015.90	\$0.00	\$205.95	\$0.00	\$1,221.85	\$1,221.85
8021 - Ship Store (Beer)	\$0.00	\$0.00	\$0.00	\$943.90	\$0.00	\$0.00	\$0.00	\$943.90	\$943.90
Total - 8000 - Cost of Goods Sold	\$0.00	\$0.00	\$0.00	\$5,991.71	\$0.00	\$750.30	\$0.00	\$6,742.01	\$6,742.01
Gross	\$84,582.27	\$6,122.96	\$90,705.23	\$13,265.42	(\$23,013.97)	(\$181,618.40)	(\$17,143.81)	(\$208,510.76)	(\$117,805.53)

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2022 to Adjust 2025
Options: Activity Only

HS 24-25

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$899,833.00	\$476,912.16	\$422,920.84	53.00%
4200 - Miscellaneous Revenue	\$0.00	\$7,107.78	(\$7,107.78)	0.00%
4500 - Federal Revenue	\$3,592,315.00	\$2,837,714.00	\$754,601.00	78.99%
Total - Income	\$4,492,148.00	\$3,321,733.94	\$1,170,414.06	73.95%
Gross Profit	\$4,492,148.00	\$3,321,733.94	\$1,170,414.06	73.95%
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$2,190,433.24	\$1,526,359.94	\$664,073.30	69.68%
7230 - Pension plan contributions	\$206,265.12	\$109,410.12	\$96,855.00	53.04%
7240 - Employee benefits - not pension	\$176,022.13	\$262,476.40	(\$86,454.27)	149.12%
7250 - Payroll taxes, etc.	\$220,091.66	\$123,579.74	\$96,511.92	56.15%
Total - 7200 - Salaries & related expenses	\$2,792,812.15	\$2,021,826.20	\$770,985.95	72.39%
7300 - Indirect Cost Pool Expense	\$538,441.00	\$354,283.11	\$184,157.89	65.80%
7500 - Contract/Consultant Services				
7550 - Contract Services	\$46,700.00	\$40,809.09	\$5,890.91	87.39%
Total - 7500 - Contract/Consultant Services	\$46,700.00	\$40,809.09	\$5,890.91	87.39%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$14,500.00	\$66,585.14	(\$52,085.14)	459.21%
8120 - Other/Maint Supplies	\$0.00	\$15,604.49	(\$15,604.49)	0.00%
8130 - Telephone & Internet	\$10,500.00	\$51,397.44	(\$40,897.44)	489.50%
8140 - Postage & shipping	\$160.00	\$1,289.75	(\$1,129.75)	806.09%
8150 - Medical/Dental Supplies	\$0.00	\$5,748.97	(\$5,748.97)	0.00%
8160 - Events/Meeting Expense	\$0.00	\$203.13	(\$203.13)	0.00%
8170 - Printing & copying	\$1,080.00	\$13,133.22	(\$12,053.22)	1,216.04%
8180 - Fatherhood	\$1,000.00	\$0.00	\$1,000.00	0.00%
Total - 8100 - Non personnel expenses	\$27,240.00	\$153,962.14	(\$126,722.14)	565.21%
8200 - Facility & equipment expenses				
8210 - Space Lease	\$9,997.80	\$2,752.07	\$7,245.73	27.53%
8220 - Electric	\$14,750.00	\$38,680.07	(\$23,930.07)	262.24%
8225 - Water	\$5,500.00	\$5,039.33	\$460.67	91.62%
8230 - Trash	\$2,000.00	\$7,389.99	(\$5,389.99)	369.50%
8235 - Sewer	\$2,000.00	\$4,090.11	(\$2,090.11)	204.51%
8240 - Natural Gas	\$2,000.00	\$1,944.01	\$55.99	97.20%
8260 - Repair/Maint for Building/Equip	\$14,918.40	\$31,615.05	(\$16,696.65)	211.92%
Total - 8200 - Facility & equipment expenses	\$51,166.20	\$91,510.63	(\$40,344.43)	178.85%
8300 - Travel & meetings expenses				
8310 - Local Travel	\$10,000.00	\$21,873.39	(\$11,873.39)	218.73%
8320 - Out of Area Travel	\$3,659.65	\$266.94	\$3,392.71	7.29%
8330 - Fuel Cost	\$0.00	\$2,870.83	(\$2,870.83)	0.00%
8335 - Vehicle Repair & Maint	\$2,865.00	\$13.85	\$2,851.15	0.48%
8340 - Child Transportation Exp	\$0.00	\$1,790.97	(\$1,790.97)	0.00%
Total - 8300 - Travel & meetings expenses	\$16,524.65	\$26,815.98	(\$10,291.33)	162.28%
8400 - Insurance Expense	\$24,675.00	\$66,544.41	(\$41,869.41)	269.68%
8700 - Food Expenses				
8710 - Food Nutrition Cost	\$46,800.00	\$151,026.66	(\$104,226.66)	322.71%
8720 - Non -Food, Nutrition Cost	\$0.00	\$248.28	(\$248.28)	0.00%
8730 - Other Food Expense	\$0.00	\$1,417.23	(\$1,417.23)	0.00%

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	Page 24 of 32
Total - 8700 - Food Expenses	\$46,800.00	\$152,692.17	(\$105,892.17)	326.27%
8800 - In-Kind Expenses	\$899,833.00	\$476,912.16	\$422,920.84	53.00%
Total - Expense	\$4,444,192.00	\$3,385,355.89	\$1,058,836.11	76.17%
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8520 - Recognition	\$0.00	\$2,912.96	(\$2,912.96)	0.00%
8530 - Fees/Dues	\$5,000.00	\$3,661.93	\$1,338.07	73.24%
8540 - Training & TTA	\$39,956.00	\$42,542.53	(\$2,586.53)	106.47%
8560 - Computer & Software Related Expenses	\$0.00	\$38,671.26	(\$38,671.26)	0.00%
8570 - Advertising & Community Sponsorships	\$2,000.00	\$15,334.43	(\$13,334.43)	766.72%
8590 - Other Expenses	\$1,000.00	\$86.91	\$913.09	8.69%
Total - 8500 - Other Expense	\$47,956.00	\$103,210.02	(\$55,254.02)	215.22%
Total - Other Expense	\$47,956.00	\$103,210.02	(\$55,254.02)	215.22%
Net Income	\$0.00	(\$166,831.97)	\$166,831.97	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2022 to Adjust 2025
Options: Activity Only

EHS24-25

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$253,800.00	\$79,589.74	\$174,210.26	31.36%
4200 - Miscellaneous Revenue	\$0.00	\$72.80	(\$72.80)	0.00%
4500 - Federal Revenue	\$1,022,216.00	\$912,902.00	\$109,314.00	89.31%
Total - Income	\$1,276,016.00	\$992,564.54	\$283,451.46	77.79%
Gross Profit	\$1,276,016.00	\$992,564.54	\$283,451.46	77.79%
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$559,106.00	\$509,841.33	\$49,264.67	91.19%
7230 - Pension plan contributions	\$52,334.65	\$26,085.75	\$26,248.90	49.84%
7240 - Employee benefits - not pension	\$72,191.97	\$86,675.29	(\$14,483.32)	120.06%
7250 - Payroll taxes, etc.	\$55,863.38	\$42,271.11	\$13,592.27	75.67%
Total - 7200 - Salaries & related expenses	\$739,496.00	\$664,873.48	\$74,622.52	89.91%
7300 - Indirect Cost Pool Expense				
7310 - Indirect Expense	\$140,843.00	\$118,875.79	\$21,967.21	84.40%
Total - 7300 - Indirect Cost Pool Expense	\$140,843.00	\$118,875.79	\$21,967.21	84.40%
7500 - Contract/Consultant Services				
7550 - Contract Services	\$2,500.00	\$9,063.60	(\$6,563.60)	362.54%
Total - 7500 - Contract/Consultant Services	\$2,500.00	\$9,063.60	(\$6,563.60)	362.54%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$31,840.00	\$30,685.49	\$1,154.51	96.37%
8120 - Other/Maint Supplies	\$0.00	\$5,431.95	(\$5,431.95)	0.00%
8130 - Telephone & Internet	\$13,400.00	\$9,145.03	\$4,254.97	68.25%
8140 - Postage & shipping	\$500.00	\$89.37	\$410.63	17.87%
8150 - Medical/Dental Supplies	\$0.00	\$1,583.39	(\$1,583.39)	0.00%
8160 - Events/Meeting Expense	\$0.00	\$168.61	(\$168.61)	0.00%
8170 - Printing & copying	\$500.00	\$4,684.64	(\$4,184.64)	936.93%
8180 - Fatherhood	\$2,500.00	\$0.00	\$2,500.00	0.00%
Total - 8100 - Non personnel expenses	\$48,740.00	\$51,788.48	(\$3,048.48)	106.25%
8200 - Facility & equipment expenses				
8210 - Space Lease	\$0.00	\$399.41	(\$399.41)	0.00%
8220 - Electric	\$8,000.00	\$13,870.72	(\$5,870.72)	173.38%
8225 - Water	\$1,000.00	\$1,637.38	(\$637.38)	163.74%
8230 - Trash	\$1,000.00	\$1,977.54	(\$977.54)	197.75%
8235 - Sewer	\$1,000.00	\$1,092.67	(\$92.67)	109.27%
8240 - Natural Gas	\$100.00	\$1,157.46	(\$1,057.46)	1,157.46%
8245 - FURNITURE, APPLIANCES & EQUIPMENT - NOT CAPITALIZED	\$0.00	\$415.57	(\$415.57)	0.00%
8260 - Repair/Maint for Building/Equip	\$4,000.00	\$7,994.28	(\$3,994.28)	199.86%
Total - 8200 - Facility & equipment expenses	\$15,100.00	\$28,545.03	(\$13,445.03)	189.04%
8300 - Travel & meetings expenses				
8310 - Local Travel	\$5,000.00	\$4,351.70	\$648.30	87.03%
8320 - Out of Area Travel	\$3,400.00	\$103.80	\$3,296.20	3.05%
8330 - Fuel Cost	\$0.00	\$1,082.11	(\$1,082.11)	0.00%
8335 - Vehicle Repair & Maint	\$0.00	\$4.62	(\$4.62)	0.00%
Total - 8300 - Travel & meetings expenses	\$8,400.00	\$5,542.23	\$2,857.77	65.98%
8400 - Insurance Expense	\$13,500.00	\$19,088.77	(\$5,588.77)	141.40%
8700 - Food Expenses				

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	BUDGET
8710 - Food Nutrition Cost	\$18,837.00	\$30,287.09	(\$11,450.09)	160.79%
8720 - Non -Food, Nutrition Cost	\$0.00	\$92.34	(\$92.34)	0.00%
8730 - Other Food Expense	\$0.00	\$3,194.30	(\$3,194.30)	0.00%
Total - 8700 - Food Expenses	\$18,837.00	\$33,573.73	(\$14,736.73)	178.23%
8800 - In-Kind Expenses	\$253,800.00	\$79,589.74	\$174,210.26	31.36%
Total - Expense	\$1,241,216.00	\$1,010,940.85	\$230,275.15	81.45%
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8520 - Recognition	\$0.00	\$163.54	(\$163.54)	0.00%
8530 - Fees/Dues	\$3,000.00	\$2,970.65	\$29.35	99.02%
8540 - Training & TTA	\$19,304.00	\$19,894.23	(\$590.23)	103.06%
8560 - Computer & Software Related Expenses	\$0.00	\$11,835.50	(\$11,835.50)	0.00%
8570 - Advertising & Community Sponsorships	\$1,000.00	\$4,341.12	(\$3,341.12)	434.11%
8590 - Other Expenses	\$11,496.00	\$0.00	\$11,496.00	0.00%
Total - 8500 - Other Expense	\$34,800.00	\$39,205.04	(\$4,405.04)	112.66%
Total - Other Expense	\$34,800.00	\$39,205.04	(\$4,405.04)	112.66%
Net Income	\$0.00	(\$57,581.35)	\$57,581.35	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2022 to Adjust 2025
Options: Activity Only

EHSCC 24-25

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	\$0.00	\$637.48	(\$637.48)	0.00%
4200 - Miscellaneous Revenue	\$0.00	\$95.92	(\$95.92)	0.00%
4500 - Federal Revenue	\$2,267,831.00	\$134,939.00	\$2,132,892.00	5.95%
Total - Income	\$2,267,831.00	\$135,672.40	\$2,132,158.60	5.98%
Gross Profit	\$2,267,831.00	\$135,672.40	\$2,132,158.60	5.98%
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	\$595,220.00	\$105,091.25	\$490,128.75	17.66%
7230 - Pension plan contributions	\$48,403.00	\$9,254.82	\$39,148.18	19.12%
7240 - Employee benefits - not pension	\$95,892.00	\$18,117.63	\$77,774.37	18.89%
7250 - Payroll taxes, etc.	\$47,435.00	\$8,127.38	\$39,307.62	17.13%
Total - 7200 - Salaries & related expenses	\$786,950.00	\$140,591.08	\$646,358.92	17.87%
7300 - Indirect Cost Pool Expense				
7310 - Indirect Expense	\$156,543.00	\$24,449.23	\$132,093.77	15.62%
Total - 7300 - Indirect Cost Pool Expense	\$156,543.00	\$24,449.23	\$132,093.77	15.62%
7500 - Contract/Consultant Services				
7540 - Professional Services	\$3,500.00	\$0.00	\$3,500.00	0.00%
7550 - Contract Services	\$15,840.00	\$1,256.62	\$14,583.38	7.93%
7560 - Partner Contracts	\$1,039,235.00	\$87,821.48	\$951,413.52	8.45%
Total - 7500 - Contract/Consultant Services	\$1,058,575.00	\$89,078.10	\$969,496.90	8.41%
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	\$56,000.00	\$23,692.43	\$32,307.57	42.31%
8120 - Other/Maint Supplies	\$0.00	\$2,799.44	(\$2,799.44)	0.00%
8130 - Telephone & Internet	\$7,200.00	\$1,444.78	\$5,755.22	20.07%
8140 - Postage & shipping	\$5,000.00	\$16.90	\$4,983.10	0.34%
8150 - Medical/Dental Supplies	\$2,000.00	\$0.00	\$2,000.00	0.00%
8170 - Printing & copying	\$5,000.00	\$76.77	\$4,923.23	1.54%
8180 - Fatherhood	\$2,000.00	\$0.00	\$2,000.00	0.00%
Total - 8100 - Non personnel expenses	\$77,200.00	\$28,030.32	\$49,169.68	36.31%
8200 - Facility & equipment expenses				
8210 - Space Lease	\$0.00	\$215.52	(\$215.52)	0.00%
8220 - Electric	\$3,600.00	\$1,756.23	\$1,843.77	48.78%
8225 - Water	\$1,200.00	\$59.61	\$1,140.39	4.97%
8230 - Trash	\$1,200.00	\$140.30	\$1,059.70	11.69%
8235 - Sewer	\$1,200.00	\$31.88	\$1,168.12	2.66%
8240 - Natural Gas	\$0.00	\$20.79	(\$20.79)	0.00%
8260 - Repair/Maint for Building/Equip	\$45,000.00	\$8,404.24	\$36,595.76	18.68%
Total - 8200 - Facility & equipment expenses	\$52,200.00	\$10,628.57	\$41,571.43	20.36%
8300 - Travel & meetings expenses				
8310 - Local Travel	\$7,500.00	\$1,595.15	\$5,904.85	21.27%
8320 - Out of Area Travel	\$5,000.00	\$192.77	\$4,807.23	3.86%
8330 - Fuel Cost	\$5,000.00	\$57.00	\$4,943.00	1.14%
Total - 8300 - Travel & meetings expenses	\$17,500.00	\$1,844.92	\$15,655.08	10.54%
8400 - Insurance Expense	\$6,000.00	\$0.00	\$6,000.00	0.00%
8700 - Food Expenses				
8710 - Food Nutrition Cost	\$0.00	\$323.74	(\$323.74)	0.00%
8720 - Non -Food, Nutrition Cost	\$3,000.00	\$0.00	\$3,000.00	0.00%

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	Page 28 of 32
8730 - Other Food Expense	\$3,000.00	\$0.00	\$3,000.00	0.00%
Total - 8700 - Food Expenses	\$6,000.00	\$323.74	\$5,676.26	5.40%
8800 - In-Kind Expenses	\$0.00	\$637.48	(\$637.48)	0.00%
Total - Expense	\$2,160,968.00	\$295,583.44	\$1,865,384.56	13.68%
Other Income and Expenses				
Other Expense				
8500 - Other Expense				
8520 - Recognition	\$25,000.00	\$0.00	\$25,000.00	0.00%
8530 - Fees/Dues	\$1,500.00	\$293.83	\$1,206.17	19.59%
8540 - Training & TTA	\$42,863.00	\$1,622.69	\$41,240.31	3.79%
8560 - Computer & Software Related Expenses	\$26,000.00	\$0.00	\$26,000.00	0.00%
8570 - Advertising & Community Sponsorships	\$5,000.00	\$5,878.51	(\$878.51)	117.57%
8590 - Other Expenses	\$6,500.00	\$0.00	\$6,500.00	0.00%
8595 - Subsidy Expense	\$0.00	\$36,305.10	(\$36,305.10)	0.00%
Total - 8500 - Other Expense	\$106,863.00	\$44,100.13	\$62,762.87	41.27%
Total - Other Expense	\$106,863.00	\$44,100.13	\$62,762.87	41.27%
Net Income	\$0.00	(\$204,011.17)	\$204,011.17	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Credit Card Vendor Totals
Sep 2025
Options: Show Zeros

NAME	AMOUNT (GROSS)
DOLLAR GENERAL CHARGE SALES	\$653.74
Elan Travel Bank	\$60,745.06
HOME DEPOT BRC/GECF	\$4,134.24
Total	\$65,533.04

LIFT Community Action Agency Inc
 Parent - Lift : LIFT Community Action Agency Inc
 Credit Card Report
 Sep 2025

Program	Facility & equipment expenses					Food Expenses			contracts, & direct assistance					
	Constructio	APPLIANCE	t for	WX Tools &	Total	Food	Non -Food,	Other Food	Direct Assistance - Other	Events/Mee	Fatherhood	Medical/De	Office/Teac	Non
	n Rehab & Renovation	S &	Building/Equip	Equipment		Nutrition Cost	Nutrition Cost	Expense		ting Expense		ntal Supplies	hing Supplies	
	Amount	Amount	Amount	Amount		Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Administration			\$5.16		\$5.16			\$823.36		\$5.20				
Apartments			\$197.49		\$197.49									
Choosing Childbirth					\$0.00									
CORE Dad Program					\$0.00			\$2,213.13	\$2,213.13	\$767.18	\$561.06	\$312.25		
Early Head Start Child Care					\$0.00				\$0.00					\$109.98
Early Learning Centers					\$0.00	\$23.76		\$293.63	\$317.39					\$1,022.33
EHS -EARLY HEAD START					\$0.00				\$0.00					
Healthy Start					\$0.00				\$0.00					
Housing	\$3,145.73				\$3,145.73				\$0.00					
HS -Head Start					\$0.00				\$0.00			\$50.00		
Mentoring					\$0.00				\$0.00					
RSVP					\$0.00				\$0.00					
Safe Place Healing Hearts					\$0.00				\$0.00					
Second Chance					\$0.00				\$0.00					
State Park Operations	\$108.22	\$2,424.58	\$117.72		\$2,650.52				\$0.00					
TMA					\$0.00				\$0.00					
TRANSIT					\$0.00				\$0.00					
Tri-CORPS					\$0.00				\$0.00					
Victim Services					\$0.00				\$0.00	\$335.00				
VOCA					\$0.00				\$0.00	\$529.20				
Weatherization				\$285.41	\$285.41				\$0.00					
WRO					\$0.00		\$36.37	\$737.82	\$774.19	\$12.00				
Youth Build					\$0.00				\$0.00					\$4,988.48
Total	\$3,253.95	\$2,424.58	\$320.37	\$285.41	\$6,284.31	\$23.76	\$36.37	\$4,067.94	\$4,128.07	\$2,539.64	\$578.26	\$312.25	\$50.00	\$6,120.79

personnel expenses															Travel & meetings ex	
Other/Maint	Postage &	Telephone	WX		&	Software		Incentive	Other	PROJECT	Recognitio	Training &	WX Health		Out of Area	Vehicle
Supplies	shipping	& Internet	Materials	Total	Community	Related	Fees/Dues	Expense	Expenses	EXPENSE	n	TTA	& Safety	Total	Travel	Repair &
Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Maint
\$61.53		\$776.26		\$842.99		\$2,380.65	(\$129.85)				\$126.11			\$2,376.91	\$3,952.44	
				\$0.00										\$0.00		
				\$0.00				\$4,681.64						\$4,681.64		
				\$873.31	\$607.85			\$1,500.00						\$2,107.85		
				\$109.98			\$18.56					\$216.48		\$235.04		
				\$1,022.33								\$52.00		\$52.00		
				\$0.00										\$0.00	\$1,402.94	
				\$0.00										\$0.00	\$1,957.29	
				\$0.00								\$770.91	\$265.45	\$1,036.36	\$385.32	
	\$969.48	\$600.00		\$1,619.48		\$5.50	\$252.69	\$625.00	\$96.69			\$727.05		\$1,706.93		
				\$0.00			\$19.00							\$288.56		
				\$0.00							\$269.56			\$193.60		
				\$0.00							\$193.60			\$0.00	\$1,107.52	
				\$0.00										\$0.00	\$304.52	
		\$1,170.20		\$1,170.20			\$3.17			\$3,622.97				\$3,626.14		
				\$0.00		\$101.94	\$985.00					\$1,600.00		\$2,686.94	\$3,671.34	
				\$0.00			\$68.33				\$23.38			\$91.71		
				\$0.00				\$100.00						\$100.00		
				\$0.00										\$0.00		
			\$1,375.94	\$1,375.94										\$0.00		\$332.56
	\$1,184.61			\$1,196.61	\$1,463.42	\$30.00			\$1,511.44					\$3,004.86	\$300.00	
\$2,453.87	\$15.66			\$7,458.01								\$624.39		\$624.39		
\$2,515.40	\$2,169.75	\$2,546.46	\$1,375.94	\$15,668.85	\$2,071.27	\$2,518.09	\$1,216.90	\$6,906.64	\$1,608.13	\$3,622.97	\$612.65	\$3,990.83	\$265.45	\$22,812.93	\$13,081.37	\$332.56

Expenses Total

Total	
Amount	Amount
\$3,952.44	\$8,000.86
\$0.00	\$197.49
\$0.00	\$5,589.90
\$0.00	\$5,961.47
\$0.00	\$345.02
\$0.00	\$1,391.72
\$1,402.94	\$1,402.94
\$1,957.29	\$1,957.29
\$385.32	\$4,567.41
\$0.00	\$3,326.41
\$0.00	\$288.56
\$0.00	\$193.60
\$1,107.52	\$1,107.52
\$304.52	\$304.52
\$0.00	\$7,446.86
\$3,671.34	\$6,358.28
\$0.00	\$91.71
\$0.00	\$100.00
\$0.00	\$335.00
\$0.00	\$529.20
\$332.56	\$1,993.91
\$300.00	\$5,275.66
\$0.00	\$8,082.40
\$13,413.93	\$64,847.73

Funding Entity: T-Mobile**Funding Opportunity: 2025 T-Mobile Hometown Grant Application (Quarter 3)****Funding Amount: \$50,000****Due Date: September 30, 2025**

T-Mobile Hometown Grants is a \$25 million, five-year initiative to support the people and organizations who help small towns across America thrive and grow. Hometown Grants are given every quarter to up to 25 small towns. Organizations can apply for funding to support a community project, like revitalizing or repurposing a historic structure, creating a downtown asset or destination, or improving a space where friends and neighbors gather. Projects that add to a sense of place or could lead to further investment are of particular interest.

This grant program is specifically open to 501(c)(3) and 501(c)(6) nonprofit organizations and local government entities. Eligible grant uses include the following: construction/installation supplies and materials; equipment; labor costs for construction/rehabilitation/installation/artist fees; artist's supplies and fees associated with a community engagement design process (i.e. a mural or creative crosswalk informed by facilitated community discussions); streetscape and/or indoor furniture for a community space; and other physical items. Special events or public space activation programming can only account for up to 10% or \$5,000 of total grant amount. In addition, applications are reviewed based upon the following criteria:

- **Community need** - Proposed project should fill a demonstrated need in the community. This grant funding is intended for shovel-ready projects, or portions of shovel-ready projects, that would not otherwise be possible to implement through municipal funding. Proposal and letters of support should demonstrate strong community support for the project.
- **Community impact** - Project should connect the community in meaningful and innovative ways.
- **Partners and engagement** - Strong applications actively involve local organizations by incorporating them into the planning and execution processes and engaging the community in activating the project site. Letters of support should come from a variety of stakeholders within the community.
- **Feasibility** - Applicants should have a shovel-ready plan ready to go and be able to complete the project according to the budget and within 12 months of receiving funding, if selected.
- **Alignment with T-Mobile's small town strategy** - T-Mobile strives to be a force for good. To read more about T-Mobile's many corporate initiatives and key segments, visit <https://www.t-mobile.com/responsibility>.

If awarded, the Play by the Lake: Hugo Lake Community Recreation Initiative will create a playground and family recreation space at Hugo Lake, transforming an underutilized area into a vibrant hub for play, connection, and wellness. This project will enhance community engagement, attract visitors, and promote health and stability for families across the region. Grant funds in the amount of \$50,000 will be used to purchase and install ADA-accessible playground equipment, safety surfacing, and site enhancements, transforming the area into a safe, engaging, and family-friendly recreational space.

Funding Entity: NeighborWorks® America

Funding Opportunity: FY25 Rural Advisory Council Travel Stipend

Project: Rural Advisory Council Annual In-Person Meeting

Funding Amount: \$2,000

Annually, the NeighborWorks® America Rural Advisory Council hosts an in-person meeting to elevate the rural voices, concerns, and perspectives of the Rural Initiative membership, recommend program strategies to NeighborWorks America, and provide feedback on how the implementation of those strategies affect diverse rural member organizations across a variety of market conditions.

LIFT CAA is requesting Board Approval to request funds from NeighborWorks® America in the amount of \$2,000 to cover costs to attend the FY2025 Rural Advisory Council In-Person Meeting.

CONTRACT FOR SERVICES
No. 1118 BASE

This Contract for Services (the “Agreement”) is made and entered into on **October 1, 2025**, by Oklahoma CASA Association, Inc., an Oklahoma nonprofit corporation (“Oklahoma CASA”), and LIFT CASA (“Local Program”), collectively referred to as “Parties” and individually as a “Party.”

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

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

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

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

- 1. Services.** Oklahoma CASA hereby engages the Local Program, and the Local Program hereby accepts such engagement, as an independent contractor to provide Services on the terms and conditions set forth in this Agreement.
 - a) Services Provided by Local Program. The Local Program shall provide Oklahoma CASA with the Services set forth in this Section 1(a). The Local Program shall:
 - i. Conduct programming that fulfills the Charitable Purpose;
 - ii. Establish and maintain financial records and accounts which document the use and expenditure of all funds received under this Agreement.
 - iii. Maintain funding source accounts (i.e. VOCA, OCASAA, United Way, unrestricted) within the organization’s overall accounting system reflecting beginning balance, expenses, deposits, and ending balance. Records reflecting fund based accounting shall be provided as requested and made available for inspection pursuant to Section 8 of this Agreement;
 - iv. Comply with the standards set forth in the Memorandum of Understanding for Membership and Funding pursuant to Section 6 of this Agreement;
 - v. Comply with Oklahoma CASA standards.
 - vi. Ensure all volunteers, staff, and Board members are screened in accordance with Oklahoma CASA Screening Protocols;
 - vii. Ensure each court-appointed special advocate completes a training program in compliance with nationally recommended Court-Appointed Special Advocate standards and is approved by the Local Program prior to being assigned a case. Local Program shall submit documentation of training to Oklahoma CASA upon its request;
 - viii. Provide evidence of proper payroll tax withholdings to Oklahoma CASA;
 - ix. Submit to Oklahoma CASA a report of its financial performance prepared by an

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

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

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

- a) Monthly Reimbursement. Oklahoma CASA shall reimburse the Local Program monthly. Local programs will be notified of total monthly funds available to be reimbursed for October, 2025 by October 10, 2025. This amount will include a base funding amount of \$1,400.00 per month, \$333.33 per month multicounty stipend, and a case reimbursement \$41.00 per case served by volunteers during September, 2025. This basis for funding will continue for each subsequent month during the contract period.
- b) Contingencies for Funding if Applicable:
- c) Reduced Funding: Should the program fall beneath the 15 case threshold for funding during the contract period, the program will be eligible to receive the case reimbursement and half of the allocated base amount.
- d) Reimbursable Expenses. Oklahoma CASA shall reimburse the Local Program in the following categories up to the Monthly Fee, as approved:
 - i. Personnel
 - ii. Staff Travel and Training Conducted in the state of Oklahoma
 - iii. Supplies and Operating Expenses
 - iv. Volunteer Travel, Training, and Recruitment
 - v. Optima



Purchase Order

Dispatch via Print

Department of Health

OKLAHOMA STATE DEPT OF HEALTH
SHIPPING & RECEIVING
123 ROBERT S. KERR AVE., SUITE 1708
OKLAHOMA CITY OK 73102-6406

Supplier: 0000540527
LIFT COMMUNITY ACTION AGENCY INC
209 N 4TH ST
HUGO OK 74743-3809

Purchase Order	Date	Revision	Page
3409028000	09/17/2025		1
Payment Terms	Freight Terms	Ship Via	
45 Days	Free on board at Destination	Common	
Buyer	Phone/Email	Currency	
Rebecca Lee	405/871-6506	USD	

Ship To: OKLAHOMA STATE DEPT OF HEALTH
ACCOUNTS PAYABLE
123 ROBERT S. KERR AVE., SUITE 1708
OKLAHOMA CITY OK 73102-6406

Bill To: OKLAHOMA STATE DEPT OF HEALTH
ACCOUNTS PAYABLE
123 ROBERT S. KERR AVE., SUITE 1708
OKLAHOMA CITY OK 73102-6406

Tax Exempt? Y **Tax Exempt ID:** 736017987

Line-Sch	Cat CD	Item Id	Description	Quantity	UOM	PO Price	Extended Amt	Due Date
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1- 1	85101503 /			1.0000	EA	20,000.0000	20,000.00	09/17/2025
			FY26/27: 10/01/25-09/30/26 - Year 1 of 5 - Pilot Project to address food insecurity for families with children under age 12 in Oklahoma					

Total PO Amount 20,000.00

COMMENTS:

Sub-Recipient Pass Through

Period of Service: 10/01/25-09/30/26 with option to renew for four additional one-year periods.

Renewals:

Year 2: 10/01/26-09/30/27
Year 3: 10/01/27-09/30/28
Year 4: 10/01/28-09/30/29
Year 5: 10/01/29-09/30/30

Please send all invoices to:

OSDH.accounts payable@health.ok.gov &
MCH@health.ok.gov

Program Contact: Angela Hoggatt:

E-Mail: AngelaMH@health.ok.gov

Vendor Contact: Kathy James -

E-Mail: Kathy.james@liftca.org

Vendor Legal Contact: Becky Reynolds:

E-Mail: becky.reynolds@liftca.org

To be billed in arrears.

Purchase order number should appear on all documentation, including, but not limited to: packing slips, invoices, bills of lading, correspondence, subject line of emails, envelope addresses and packages. The purchase order number should be visible without the need to open the package. Shipments, invoices and other documentation not properly identified by purchase order number may result in refusal of delivery, delayed payment or other delays in response.

Vendor acknowledges, by receipt of this instrument, document or communication, that any agreement entered into or executed by the parties is subject to the provisions of the Oklahoma central purchasing act, 74 O.S., § 85.1, et seq.

Pursuant to Oklahoma statute 62 §34.71, the state of Oklahoma has 45 days from presentation of a proper invoice to issue payment to the supplier.

Authorized Signature

Becky Lee



Purchase Order

Dispatch via Print

Department of Health

OKLAHOMA STATE DEPT OF HEALTH
SHIPPING & RECEIVING
123 ROBERT S. KERR AVE., SUITE 1708
OKLAHOMA CITY OK 73102-6406

Supplier: 0000540527
LIFT COMMUNITY ACTION AGENCY INC
209 N 4TH ST
HUGO OK 74743-3809

Purchase Order	Date	Revision	Page
3409028000	09/17/2025		2
Payment Terms	Freight Terms	Ship Via	
45 Days	Free on board at Destination	Common	
Buyer	Phone/Email	Currency	
Rebecca Lee	405/871-6506	USD	

Ship To: OKLAHOMA STATE DEPT OF HEALTH
ACCOUNTS PAYABLE
123 ROBERT S. KERR AVE., SUITE 1708
OKLAHOMA CITY OK 73102-6406

Bill To: OKLAHOMA STATE DEPT OF HEALTH
ACCOUNTS PAYABLE
123 ROBERT S. KERR AVE., SUITE 1708
OKLAHOMA CITY OK 73102-6406

Tax Exempt? Y **Tax Exempt ID:** 736017987

Line-Sch	Cat CD	Item Id	Description	Quantity	UOM	PO Price	Extended Amt	Due Date
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No oral statement, online click-wrap amendments, facsimile, mail or other notification issued by vendor shall modify or otherwise effect the terms, conditions, or specifications stated in this purchase order unless accepted in writing by the Oklahoma state department of health, procurement service.

If there is a conflict between the terms contained or referenced on this PO and an agreement provided by, or on behalf of, supplier including, but not limited to, linked or supplemental documents which alter or diminish the rights of OSDH, the conflicting terms provided by supplier shall not take priority over this PO's terms. In no event will any linked document alter or override such referenced terms except as specifically agreed in an addendum.

Authorized Signature

Becky Lee

CONTRACT FOR DOMESTIC VIOLENCE AND SEXUAL ASSAULT SERVICES
State Funding
FY 2026

This Contract ("Contract") is made and entered into this **1ST day of July, 2025**, between the Office of Attorney General (hereinafter referred to as "OAG"), **LIFT Community Action Agency** (hereinafter referred to as "Contractor"), Subgrant # **SF-26-12**, City of **Hugo**, County of **Choctaw**, State of **Oklahoma**, and having UEI# **XL9DVU1YDGU2** and having Vendor I.D. **75544** for the purpose of supporting the establishment, maintenance, and expansion of programs and projects to prevent incidents of family violence, domestic violence, and dating violence; to provide immediate shelter, supportive services, and access to community-based programs for victims of family violence, domestic violence, sexual assault, stalking or dating violence, and their dependents, and to provide specialized services for children exposed to family violence, domestic violence, or dating violence, underserved populations, and victims who are members of racial and ethnic minority populations.

In consideration of the provisions set forth herein, the Parties mutually agree to the following provisions and those found in the Addendum attached hereto and incorporated herein.

I. EFFECTIVE DATES OF CONTRACT

- A. This contract is in effect **July 1, 2025, through June 30, 2026**.
- B. The Parties further acknowledge and understand this contract is effective only for the term set forth in Paragraph I (A) above. The Parties to this contract understand and acknowledge any future contracts or renewals are not automatic nor implied by this Contract. Upon expiration of this Contract, OAG may offer the Contractor an option to renew this Contract for an additional 12-month period unless either party provides to the other party written notice of the intent to cancel thirty (30) days prior to the renewal date.

II. STATEMENT OF WORK

- A. The Contractor shall provide the services as indicated and in the manner set forth in the Addendum attached hereto and incorporated herein. Said Addendum shall be binding on the Parties of this Contract as if fully stated herein.

III. PERFORMANCE REQUIREMENTS

- A. The Contractor agrees to abide by all applicable state and federal laws, rules, and regulations including but not limited to non-disclosure of client information and the provisions of this Contract and Addendum attached hereto, including but not limited to all licensing, permit or certification requirements, labor laws and workers compensation laws. Any act committed by a Contractor, its officers, directors, employees or other authorized persons, which violates any of the foregoing will constitute a breach of this Contract. Further, the Contractor is expected to take appropriate measures to prevent any instances of abuse, neglect, and violations of client rights, including termination or other appropriate discipline against any employee or agent of Contractor found to have abused or neglected, mentally or physically, or otherwise violated the rights of any client or permitted such violation.
- B. Loss of required certification or license by the Contractor shall automatically terminate this Contract.
- C. The Contractor shall not engage in any subcontract to provide the services herein without prior written approval of OAG. If approved, the Contractor shall be liable for any act or omission of the subcontractor, including any act or omission that constitutes a breach of this Contract. The Contractor or subcontractor shall not obligate OAG to pay any sums to the Contractor, subcontractor or any other person or entity without the prior written approval of OAG. Any subcontracts shall be terminated if a conflict of interest

arises between the subcontractor and OAG.

- D. The Contractor certifies that it and all proposed subcontractors, whether known or unknown at the time this Contract is executed or awarded, are in compliance with 25 O.S.2011 §1313 and participate in the Status Verification System. The Status Verification System is defined in 25 O.S.2011 §1312 and includes but is not limited to the free Employee Verification Program (E-Verify) available at www.dhs.gov/E-Verify.
- E. Neither this Contract, nor any part herein, may be assigned without the prior written approval of OAG.
- F. In the performance of all services rendered under this Contract, the Contractor shall act solely as an independent contractor and nothing herein shall at any time be construed so as to create the relationship of employer and employee, partnership, principal and agent, or joint venture between the Parties.
- G. The Contractor shall not solicit clients through gratuitous offerings, incentives, gifts or other offerings for any service provided by the Contractor; nor shall the Contractor allow any other provider to solicit clients of the Contractor through gratuitous offerings, incentives, gifts or other offerings. The Contractor shall not use any coercion, duress, force or similar action, real or threatened, against any client for the purpose of soliciting clients or for the purpose of hindering or obstructing any investigation conducted by OAG, any other governmental agency or advocacy group.
- H. The Contractor shall not set income eligibility standards and shall not assess fees for assistance or services. The Contractor shall provide the services as set forth herein without regard to a client's ability to pay. No person meeting OAG's eligibility requirements and needing the services authorized herein shall be denied treatment or services for inability to pay, and said person must be notified, in a reasonable manner, of this provision.
- I. The Contractor shall not charge a fee for emergency core services provided to victims of domestic violence, dating violence, sexual assault, and stalking or to their dependent household members, nor will SNAP benefits be solicited from individuals in exchange for services. Shelter program shall provide room, food, bathing and laundry facilities, necessary clothing and toiletries for victims and their children free of charge. Programs shall not ask clients to use their SNAP benefits to supplement food for the facility. Shelter programs shall maintain basic food items available daily for breakfast, lunch, dinner as well as snacks.

Additionally, fees will not be charged for use of equipment or facilities.

- J. Services must be provided on a voluntary basis; receipt of shelter or housing must not be conditioned on participation in supportive services.
- K. Services shall be trauma informed.
- L. The Contractor shall not transmit any identifying information such as initials, age, and year of birth or gender as part of the Client I.D. That same discreet identifier shall be the Client ID that is entered into the Contractor's data base without further encryption.

IV. COMPENSATION

- A. In accordance with the terms of this Contract, OAG will pay the Contractor an amount not to exceed **\$227,245.00** payable to the Contractor as set forth in the Addendum attached hereto.

OAG shall pay on a claim for reimbursement, upon receipt of a monthly Request for Funds, submitted to OAG by the 15th day of the month following the month expenses were last rendered, unless otherwise prescribed. All services related to batterers intervention and adult sex trafficking shall not be reimbursed pursuant to this Contract.

ADDENDUM

CONTRACT DOMESTIC VIOLENCE AND SEXUAL ASSAULT SERVICES F.Y. 2026

I. STATEMENT OF WORK

A. State DV/SA funding provided pursuant to this Contract Addendum ("Addendum") is for services to victims or survivors of domestic violence, sexual assault, stalking, dating violence and dependent family members.

Contractor shall serve any person meeting these eligibility criteria, subject to the availability of funds, except that Contractor agrees to provide, irrespective of the availability of funding pursuant to this Contract, immediate crisis intervention and access to short-term emergency shelter to all persons in need of such services. This includes providing emergency transportation to shelter when transportation is necessary to ensure the safety of a victim or victims.

No income eligibility standard will be imposed on individuals in need of services pursuant to this Contract.

No fees will be charged victims for services as defined pursuant to this Contract nor will donations be solicited from individuals in exchange for services.

B. Contractor shall provide services to/for children pursuant to the Oklahoma Administrative Code (OAC) 75 OAC 15, with the following priorities: to children as victims, to children as dependents of victims, for children through parent education, and for children through preventive services provided to schools and communities.

C. Contractor shall provide sexual assault crisis intervention, advocacy, and support services and/or counseling/educational services for victims/survivors and their families. Sexual assault services may include services to victims of sex trafficking as further defined in 75 OAC 30.

D. Contractor shall provide immediate shelter, supportive services, and prevention services for adult and youth victims of family violence, domestic violence or dating violence and their dependents.

E. The Contractor shall provide training to staff and volunteers (including board members and students), support, education, consultation, outreach, and other preventative services to potential service recipients and to organizations and professionals who interact in the community with victims of domestic violence, dating violence, sexual assault, and stalking.

F. Contractor shall not provide couples counseling or treatment between a victim of domestic violence and the perpetrator.

II. PERFORMANCE MONITORING

A. Services shall be recorded in the client record and shall be reported to OAG using a data repository as approved by OAG or other monthly or quarterly-reports as requested by OAG. Reimbursement expenses shall be reported by the fifteenth (15) of the month. Contractor shall report, in accordance with OAG's policies, all clients and the provision of all services, including services for which payment or support is received from the client or a third party.

B. Contractor shall maintain a daily census record of its population and shall submit such reports in the format and at the frequency directed by OAG.

- C. Activities not reportable in terms of other approved data systems shall be reported to OAG monthly by the fifteenth (15) of the month.

Payment for the month following may not be approved until the monthly request for funds form has been received.

- D. OAG may conduct service verification reviews on a random basis. Subsequent payments may be withheld or decreased if service delivery cannot be verified. Services and expenses that cannot be verified may be grounds for Contract termination.

III. COMPENSATION

- A. Total Compensation pursuant to this Contract shall not exceed \$227,245.00 for victims of domestic violence, dating violence, sexual assault, and stalking services. This total amount is comprised of \$225,250.00 state appropriations and \$1,995.00 court fee assessments. These funds are to be used solely for the provision of services to victims of family violence, domestic violence, dating violence, sexual assault, or stalking.

IV. OTHER PROVISIONS

- A. Contractor shall have adequately trained staff, either paid or volunteer, on duty on a 24-hour basis to meet emergency needs, answer crisis telephone lines, and generally respond to the needs of victims of family violence, domestic violence, dating violence, stalking and/or sexual assault, and their dependents. All shelters shall be staffed in accordance with OAG's rules, and at all times when clients are in residence.
- B. Contractor shall maintain written procedures and training plans to assure the safety of staff and volunteers working in crisis situations and shall have a written plan for the safety and well-being of dependent children receiving residential shelter services when mothers and/or guardians are not present.
- C. Crisis service centers shall have the capacity to assure the immediate safety of victims. If short-term emergency shelter is not immediately available, Contractor shall arrange for transportation to an emergency shelter.
- D. Contractor shall fully cooperate with OAG staff and all other boards or committees involved in the planning, coordination, and review of the provision of domestic violence, dating violence, sexual assault, and stalking services.
- E. Contractor will complete a section of the annual performance report required for the maintenance of funds from the State DV/SA account.
- F. Contractor shall submit a Request for Funds to OAG by the fifteenth (15) of the month for services rendered the previous month.

From: AJ Griffin <ajgriffin@pottsfamilyfoundation.org>
Sent: Friday, September 19, 2025 10:18 AM
To: Cindy Mills <Cindy.Mills@liftca.org>
Cc: Cassady Dixon <cdixon@pottsfamilyfoundation.org>
Subject: Payment

A payment in the amount of \$638.40 has been approved and should be in your account on Monday.

AJ Griffin, Ed. D.
 Chief Executive Officer
 Potts Family Foundation
 Cell 405-834—0782
ajgriffin@pottsfamilyfoundation.org
www.pacesconnection.com/g/raising-resilient-Oklahomans
www.pottsfamilyfoundation.org
 @pottsfamilyfdn

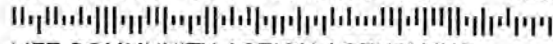
Community Event Grant Application

Organization Name	LIFT Community Action Agency
Project Name (if applicable)	LIFT Family Resource Center
Contact Person and Title	Ashley Gaddy, Outreach Specialist
Contact Phone	580-326-7581
Contact Email	ashley.gaddy@liftca.org
Brief description of the event and how it supports the Know and Grow Initiative	The Family Resource Center held an informational training session for parents/caregivers over Understanding Your Child's IEP. We partnered with Oklahoma Parents Center to hold this training in our community. This was a recommended training from our Parent Advisory Committee.
Event Details: Date, time, location, description of those in attendance	The event took place on Wednesday, August 20th from 10:30-11:30. We had a mix of parents and professionals who attended the training to learn more about the IEP process and how to best advocate for their children and the children they serve.



Page 1 of 1

0145303 01 RE 0.67 **AUTO T4 0 6176 74743-380909 -P45348 C07



LIFT COMMUNITY ACTION AGENCY INC
209 N 4TH ST
HUGO OK 74743-3809

Check Date: 09/11/2025
Check No.: 1806479116
Check Amount: \$2,000.00
Vendor No.: 0200083077

INVOICE DATE	INVOICE NUMBER	DESCRIPTION	GROSS AMOUNT	DISCOUNT AMOUNT	NET AMOUNT
09/10/2025	091020255		\$2,000.00	\$0.00	\$2,000.00
		TOTAL	\$2,000.00	\$0.00	\$2,000.00

For Payments Status and Inquiries, please visit <https://launchpad.ipaper.com>.

If You Require Access to the IPAY Website, please email ipayaccess@ipaper.com.



DETACH AND RETAIN THIS STUB FOR YOUR RECORDS

CHECK # 1806479116 ATTACHED BELOW



International Paper Company - Citibank Returns
6400 Poplar Ave
Tower 1, 4th FL Rm 073
Memphis, TN 38197

62-20
311

CHECK NO.: 1806479116

CHECK DATE: 09/11/2025

Two Thousand and 00/100 Dollars

PAY TO THE
ORDER OF

LIFT COMMUNITY ACTION AGENCY INC
209 N 4TH ST
HUGO OK 74743-3809

\$\$\$\$\$\$\$\$\$\$\$2,000.00

VOID IF AFTER 180 DAYS

AUTHORIZED SIGNATURE

CITIBANK, N.A.
ONE PENN'S WAY, NEW CASTLE, DE 19720

1806479116 0311002091

54265477

RE0145303-0001_of_0001 6176-0047851 (P235)



NeighborWorks America
1255 Union Street, NE
Suite 500
Washington DC 20002
United States

Bank Of America

Item G6
00000070/135
Page 1 of 2

PAY seventy-seven thousand and
00/100

NOT VALID AFTER 180 DAYS

DATE 9/4/2025

TO LIFT Community Action Agency, Inc.
THE 209 North 4th Street
ORDER Hugo OK 74743
OF United States

\$ ***\$77,000.00

VOID

****ACH PAYMENT****

NeighborWorks America

00000070/135

LIFT Community Action Agency, Inc.

9/4/2025

Date	INVOICE	Memo	Orig. Amt.	Amt. Due	Amount
9/2/2025	54117		\$2,000.00	\$2,000.00	\$2,000.00
5/21/2025	53798		\$75,000.00	\$75,000.00	\$75,000.00
					\$77,000.00

PLEASE DETACH AND RETAIN FOR YOUR RECORDS



NeighborWorks America
1255 Union Street, NE
Suite 500
Washington DC 20002
United States

Bank Of America

Item G6
00000051/90
Page 2 of 2

PAY fifty-eight thousand and
00/100

NOT VALID AFTER 180 DAYS

DATE 5/22/2025

TO LIFT Community Action Agency, Inc.
THE 209 North 4th Street
ORDER Hugo OK 74743
OF United States

\$ ***\$58,000.00

VOID

****ACH PAYMENT****

NeighborWorks America

00000051/90

LIFT Community Action Agency, Inc.

5/22/2025

Date	INVOICE	Memo	Orig. Amt.	Amt. Due	Amount
5/21/2025	52887		\$1,000.00	\$1,000.00	\$1,000.00
5/21/2025	53221		\$57,000.00	\$57,000.00	\$57,000.00
					\$58,000.00

PLEASE DETACH AND RETAIN FOR YOUR RECORDS



NeighborWorks America
1255 Union Street, NE
Suite 500
Washington DC 20002
United States

Bank Of America

00000070/135
Item G7

PAY seventy-seven thousand and
 00/100

NOT VALID AFTER 180 DAYS

DATE 9/4/2025

TO LIFT Community Action Agency, Inc.
THE 209 North 4th Street
ORDER Hugo OK 74743
OF United States

\$ ***\$77,000.00

VOID

****ACH PAYMENT****

NeighborWorks America

00000070/135

LIFT Community Action Agency, Inc.

9/4/2025

Date	INVOICE	Memo	Orig. Amt.	Amt. Due	Amount
9/2/2025	54117		\$2,000.00	\$2,000.00	\$2,000.00
5/21/2025	53798		\$75,000.00	\$75,000.00	\$75,000.00
					\$77,000.00

PLEASE DETACH AND RETAIN FOR YOUR RECORDS



CONTRACT BETWEEN KI BOIS COMMUNITY ACTION FOUNDATION, INC. AND LIFT COMMUNITY ACTION AGENCY, INC.

This agreement, made this the 1st day of October, 2025 by and between KI BOIS Community Action Foundation, Inc. and LIFT Community Action Agency, Inc. is for the following services:

LIFT Community Action Agency, Inc. agrees to provide Rx for Oklahoma services in Choctaw, McCurtain, and Pushmataha Counties of Oklahoma for the period of October 1, 2025 and ending December 31, 2025.

In consideration for Rx services provided, LIFT Community Action Agency, Inc. will be paid an amount not to exceed \$4,887.16.

LIFT Community Action Agency, Inc. agrees to

1. Submit Reimbursement Claims by the 10th of each month for the previous month. This is a 90-day extension and will be invoiced by 13th of the extension amount. If an invoice is submitted for less, the remaining funds cannot be requested on a future invoice. Upon receipt of proper documentation, KI BOIS Community Action Foundation, Inc. will reimburse LIFT Community Action Agency, Inc. per submitted claims up to the maximum allocation.
2. Submit Monthly Progress Reports by the 10th of each month for the previous month. These reports shall be submitted in the proper format as required by the Oklahoma State Department of Health (OSDH). These reports include:
 - a. Monthly client report with demographics on new clients assisted for the month, number of active clients (new and existing clients), number of clients referred to other resources for prescription assistance, and number of new claims, amount of new claims, number of reconciled claims, amount of reconciled claims, and number of pending claims and amount of pending claims. Whereas claims prescriptions.
 - b. Call Log
 - c. Community Outreach Report to include monthly marketing efforts of the Rx for Oklahoma program and services.
 - d. **Inventory Log**

LIFT Community Action Agency, Inc. agrees to abide by the Rx for Oklahoma Implementation Manual provided by the Oklahoma State Department of Health and Region 4 Policies and Procedures.

Executed the 1st day of October 1st, 2025

Rebecca Reynolds, Executive Director
LIFT Community Action Agency, Inc.

R. Carroll Huggins, CCAP
Executive Director, CEO
KI BOIS Community Action Foundation, Inc.

**The Oklahoma Partnership for School Readiness Foundation, Inc.
Subrecipient Subaward Contract**

This subaward is funded with 100% federal funding through the Preschool Development Grant Birth-Five
Federal Award Number 90TP0094-01-00
Assistance Listing Number: 93.434

This Subrecipient Subaward Contract (referred to as “Subaward”) is by and between The Oklahoma Partnership for School Readiness Foundation, Inc., an Oklahoma nonprofit corporation and its directors, officers, employees, volunteers, affiliates and agents, (collectively, “Foundation”) and LIFT Community Action Agency, Inc. (referred to as “Subrecipient”). The Foundation and Subrecipient shall be referred to as a “Party” and collectively as the “Parties.”

WHEREAS, Foundation desires the Subrecipient to provide certain services upon the terms and conditions hereinafter set forth, and Subrecipient is willing to perform such services.

NOW THEREFORE, in consideration of the mutual covenants and Subaward hereinafter set forth, the parties agree as follows:

1. Services

- 1.1 Foundation hereby engages Subrecipient and Subrecipient hereby accepts such Subaward, to execute the Scope of Work (Schedule A) related to Foundation’s grant award of \$52,500.00.
- 1.2 Subrecipient shall provide to Foundation the services set forth on the attached Scope of Work (Schedule A) pursuant to the approved Budget (Schedule B).
- 1.3 Foundation shall not control the manner or means by which Subrecipient or Subrecipient’s employees perform the Services.
- 1.4 With the exception of funds provided under this Subaward, each party shall furnish at their own expense, any additional equipment, supplies, and other materials used to perform the Services as identified in the Scope of Work.
- 1.5 While on Foundation’s premises, using Foundation’s equipment, or conducting business on behalf of Foundation, Subrecipient shall comply with all applicable policies of Foundation relating to business and office conduct, health and safety, and use of Foundation’s facilities, supplies, information technology, equipment, networks, and other resources.

2. Term

The term of this Subaward shall commence as of October 1, 2025 – December 30, 2025.

3. Termination

Either Party may terminate this Subaward without cause upon thirty (30) days written notice to the other Party.



Legal Name of Organization	LIFT Community Action Agency, Inc.		
Physical Address	209 N 4th Street Hugo, OK. 74743		
Mailing Address	209 N 4th Street Hugo, OK. 74743		
Phone	5803263351		
Contact Name	Rebecca Porter	Email	becky.reynolds@liftca.org

Summary Budget Request:

Budget Line Item	Federal \$	Match	Total
Personnel/Salaries	\$ -	\$ -	\$ -
Fringe Benefits	\$ -	\$ -	\$ -
Equipment	\$ -	\$ -	\$ -
Travel/Training	\$ -	\$ -	\$ -
Supplies	\$ 40,000.00	\$ -	\$ 40,000.00
Contractual	\$ -	\$ -	\$ -
Other (list)	\$ 12,500.00	\$ -	\$ 12,500.00
Indirect Costs	\$ -	\$ -	\$ -
TOTAL	\$ 52,500.00	\$ -	\$ 52,500.00

Personnel/Salaries Detail Request: This Section is only used to provide Match

Position Title	Staff name	Annual Salary	% FTE	Federal	Match	Total
		\$ -	0.0%	\$ -	\$ -	\$ -
		\$ -	0.0%	\$ -	\$ -	\$ -
		\$ -	0.0%	\$ -	\$ -	\$ -
		\$ -	0.0%	\$ -	\$ -	\$ -
		\$ -	0.0%	\$ -	\$ -	\$ -
		\$ -	0.0%	\$ -	\$ -	\$ -
		\$ -	0.0%	\$ -	\$ -	\$ -
		\$ -	0.0%	\$ -	\$ -	\$ -
		\$ -	0.0%	\$ -	\$ -	\$ -
Category Total:				\$ -	\$ -	\$ -

Fringe Benefits: This Section is only used to provide Match

Explanation of Employee Benefits Included	% Used for Calculation	Federal Salary Total	Match	Total
	\$ - 0.0%	\$ -	\$ -	\$ -
	\$ - 0.0%	\$ -	\$ -	\$ -
	\$ - 0.0%	\$ -	\$ -	\$ -
	\$ - 0.0%	\$ -	\$ -	\$ -
	\$ - 0.0%	\$ -	\$ -	\$ -
	\$ - 0.0%	\$ -	\$ -	\$ -
	\$ - 0.0%	\$ -	\$ -	\$ -
	\$ - 0.0%	\$ -	\$ -	\$ -
	\$ - 0.0%	\$ -	\$ -	\$ -
Category Total:		\$ -	\$ -	\$ -

Travel / Training-Not Used for this Request for Proposal

Provide an explanation and list of expected travel and training expenses to include in-state and out-of-state events	Federal	Match	Total
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
Category Total:	\$ -	\$ -	\$ -

Supplies

Provide an explanation of any supply expenses	Federal	Match	Total
Developmental Skill Building Kits (400 kits @ \$75 each)	\$ 30,000.00	\$ -	\$ 30,000.00
Parenting Kits (400 @ \$25 each)	\$ 10,000.00	\$ -	\$ 10,000.00
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
Category Total:	\$ 40,000.00	\$ -	\$ 40,000.00

Contractual

Provide a list of contracts	Federal	Match	Total
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
Category Total:	\$ -	\$ -	\$ -

Other

Provide a list of other expense	Federal	Match	Total
Light Refreshments (water, juice, fruit/vegetable trays) \$400/event x 3	\$ 1,200.00	\$ -	\$ 1,200.00
Marketing (Radio ads, pamphlets, brochures, signage, Social media boosts, etc.)	\$ 1,800.00	\$ -	\$ 1,800.00
QR subscription	\$ 400.00	\$ -	\$ 400.00
Printing costs for brochures, pamphlets, posters, etc.	\$ 3,100.00		\$3,100
Family Engagement Activities (\$2,000 per event x 3)	\$ 6,000.00		\$6,000
Category Total:	\$ 12,500.00	\$ -	\$ 12,500.00

IDC

Provide an explanation of IDC rate and/or include a Cost Allocation Plan for Admin Costs.	Federal	Match	Total
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
Category Total:	\$ -	\$ -	\$ -

Equipment-Not Used for this Request for Proposal

Provide a list and explanation of expense for equipment - include Organization's Asset Threshold in the attachments	Federal	Match	Total
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
	\$ -	\$ -	\$ -
Category Total:	\$ -	\$ -	\$ -

EXTENDED TO NOVEMBER 17, 2025

Return of Organization Exempt From Income Tax

OMB No. 1545-0047

Form **990**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public.

Go to www.irs.gov/Form990 for instructions and the latest information.**2024**

Open to Public Inspection

A For the 2024 calendar year, or tax year beginning

and ending

B Check if applicable:

- ☐ Address change
☐ Name change
☐ Initial return
☐ Final return/terminated
☐ Amended return
☐ Application pending

C Name of organization

LIFT COMMUNITY ACTION AGENCY, INC

Doing business as

Number and street (or P.O. box if mail is not delivered to street address)

209 N 4TH ST

Room/suite

City or town, state or province, country, and ZIP or foreign postal code

HUGO, OK 74743

F Name and address of principal officer: REBECCA REYNOLDS

SAME AS C ABOVE

D Employer identification number

73-0772321

E Telephone number

580-326-3351

G Gross receipts \$

25,661,139.

H(a) Is this a group returnfor subordinates? ☐ Yes ☒ No**H(b)** Are all subordinates included? ☐ Yes ☐ No

If "No," attach a list. See instructions

H(c) Group exemption number**I** Tax-exempt status: ☒ 501(c)(3) ☐ 501(c) () (insert no.) ☐ 4947(a)(1) or ☐ 527**J** Website: WWW.LIFTCA.ORG**K** Form of organization: ☒ Corporation ☐ Trust ☐ Association ☐ Other**L** Year of formation: 1968**M** State of legal domicile: OK**Part I Summary**

Activities & Governance	1	Briefly describe the organization's mission or most significant activities: "HELPING PEOPLE - CHANGING LIVES" - TO IMPROVE THE LIVES OF LOW-INCOME INDIVIDUALS AND FAMILIES		
	2	Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	3	Number of voting members of the governing body (Part VI, line 1a)	3	28
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	28
	5	Total number of individuals employed in calendar year 2024 (Part V, line 2a)	5	476
	6	Total number of volunteers (estimate if necessary)	6	1194
	7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	0.
7b	Net unrelated business taxable income from Form 990-T, Part I, line 11	7b	0.	
Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year 17,846,476.	Current Year 17,832,660.
	9	Program service revenue (Part VIII, line 2g)	9,194,562.	6,798,351.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	36,467.	145,734.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	662,304.	881,154.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	27,739,809.	25,657,899.
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)	0.	0.
	14	Benefits paid to or for members (Part IX, column (A), line 4)	0.	0.
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	11,604,665.	12,484,039.
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	0.	0.
	16b	Total fundraising expenses (Part IX, column (D), line 25)	0.	
	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e)	15,410,047.	13,577,776.
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	27,014,712.	26,061,815.
19	Revenue less expenses. Subtract line 18 from line 12	725,097.	-403,916.	
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	Beginning of Current Year 22,486,757.	End of Year 21,683,542.
	21	Total liabilities (Part X, line 26)	1,544,732.	1,147,307.
	22	Net assets or fund balances. Subtract line 21 from line 20	20,942,025.	20,536,235.

Part II Signature Block

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

Sign Here	Signature of officer		Date	
	REBECCA REYNOLDS, EXECUTIVE DIRECTOR/CEO			
Paid Preparer Use Only	Preparer's name	Preparer's signature	Date	Check ☐ self-employed PTIN
	LETITIA S. TALKINGTON		09/16/25	P00082380
Firm's name	LANDMARK PLC, CPAS		Firm's EIN 71-0355269	
	Firm's address 3101 S 70TH STREET FORT SMITH, AR 72903		Phone no. (479) 484-5740	

May the IRS discuss this return with the preparer shown above? See instructions

☒ Yes ☐ No

LHA. For Paperwork Reduction Act Notice, see the separate instructions.

432001 12-10-24

Form **990** (2024)

SEE SCHEDULE O FOR ORGANIZATION MISSION STATEMENT CONTINUATION

Form 990 (2024)

LIFT COMMUNITY ACTION AGENCY, INC

73-0772321

Page 2

Part III Statement of Program Service Accomplishments

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

☒ X

- 1 Briefly describe the organization's mission:
TO IMPROVE THE LIVES OF LOW-INCOME INDIVIDUALS AND FAMILIES THROUGH SERVICE AND COLLABORATION LEADING TO SELF-SUFFICIENCY.
- 2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No
If "Yes," describe these new services on Schedule O.
- 3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No
If "Yes," describe these changes on Schedule O.
- 4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.
 - 4a (Code:) (Expenses \$ 10,396,355. including grants of \$) (Revenue \$ 1,685,019.)
EARLY CHILDHOOD - PRE-SCHOOL AND DAYCARE PROGRAMS FOR LOW-INCOME AND HANDICAPPED CHILDREN, FUNDED BY FEDERAL/STATE GRANTS AND PARENT FEES. EARLY CHILDHOOD EXPENSES ARE APPROXIMATELY 54% OF PROGRAM SERVICE EXPENSES. EARLY CHILDHOOD 88 INFANTS AND TODDLERS RECEIVED SERVICES THROUGH 3 CENTERS. 201 INFANTS & TODDLERS RECEIVED SERVICES THROUGH 6 PARTNERSHIP LOCATIONS EARLY HEAD START/CHILD CARE PARTNERSHIP/EARLY LEARNING CENTERS. HEAD START 340 CHILDREN WERE PROVIDED HEAD START SERVICES IN 28 CLASSROOMS. CHILD AND ADULT CARE FOOD PROGRAM (CACFP) - PROVIDED TRAINING AND MONITORING TO 125 DAYCARE HOMES IN 39 COUNTIES. CACFP PROVIDERS RECEIVED REIMBURSEMENTS FOR SERVING NUTRIOUS MEALS..
 - 4b (Code:) (Expenses \$ 3,662,717. including grants of \$) (Revenue \$ 165,095.)
HOUSING REHAB AND WEATHERIZATION OF HOMES FOR LOW INCOME AND SECTION 8 HOUSING FOR LOW-INCOME, FUNDED BY FEDERAL/STATE GRANTS AND TENANT RENTAL PAYMENTS. HOUSING EXPENSES AND APPROXIMATELY 20% OF PROGRAM SERVICE EXPENSES. MULTI-FAMILY HOUSING LIFT HAS 60 UNIT COMPLEX AND TRIPLEXES IN VALLIANT, GARVIN, FORT TOWSON, ANTLERS, SOPER, AND BOSWELL. DUPLEX UNITS ARE LOCATED IN ANTLERS, HUGO, AND CONSTRUCTED IN VALLIANT IN 2024. SELF HELP HOUSING - A TOTAL OF 9 FAMILIES BILT NEW HOMES IN 2024 SERVING ACROSS 8 COUNTIES OF SOUTHEAST OKLAHOMA. WEATHERIZATION 42 HOMES WERE WEATHERIZED ACROSS 12 COUNTIES. A TOTAL OF 97 CLIENTS BENEFITED WITH A COMBINE ANNUAL COST SAVINGS OF \$13,961.29. TECHNICAL AND MANAGEMENT ASSISTANCE PROGRAMS T&MA STAFF PROVIDED TRAINING AND MONITORING TO 16 SELF-HELP HOUSING GRANTEEES IN REGION II
 - 4c (Code:) (Expenses \$ 4,072,681. including grants of \$) (Revenue \$ 3,927,438.)
COMMUNITY SERVICES - PROVIDE NECESSARY COMMUNITY SERVICES TO REDUCE POVERTY AND EMPOWER LOW-INCOME FAMILIES AND INDIVIDUALS TO BECOME SELF-SUFFICIENT. COMMUNITY SERVICES EXPENSES ARE APPROXIMATELY 15% OF PROGRAM SERVICE EXPENSES. COURT APPOINTED SPECIAL ADVOCATES (CASA) 40 YOUTH WERE SERVED AND 4 NEW VOLUNTEERS TRAINED. HEALTHY START: THE HEALTHY START GRANT WAS REFUNDED IN MAY 2024, FOR ANOTHER 5 YEARS. THE SERVICE AREA NOW INCLUDES CHOCTAW, PUSHMATAHA, MC CURTAIN, ATOKA, COLE AND JOHNSTON COUNTIES. HEALTHY START PROVIDES SERVICES TO PREGNANT WOMEN, DADS, BABIES AND CHILDREN UP TO 18 MONTHS IN AGE. ADDITIONAL SERVICES NOW INCLUDE COMMUNITY EDUCATION THAT IS AVAILABLE TO ANYONE IN THE COMMUNITY. SINCE MAY 1, 2024 HEALTHY START SERVED 183 PREGNANT WOMEN, 211 INTER-CONCEPTIONAL WOMEN, 16 DADS, 150 BABIES, BIRTH TO 11
 - 4d Other program services (Describe on Schedule O.)
(Expenses \$ 3,020,248. including grants of \$) (Revenue \$ 1,901,953.)
 - 4e Total program service expenses 21,152,001.

Form 990 (2024)

Part IV Checklist of Required Schedules

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

Part IV Checklist of Required Schedules (continued)

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

Note: All Form 990 filers are required to complete Schedule O

Part V Statements Regarding Other IRS Filings and Tax Compliance

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

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

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

	Yes	No
2a Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	2a	476
b If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	X
3a Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	X
b If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation on Schedule O	3b	
4a At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	X
b If "Yes," enter the name of the foreign country See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a	X
b Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	X
c If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c	
6a Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?	6a	X
b If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	
7 Organizations that may receive deductible contributions under section 170(c).		
a Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	X
b If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	
c Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	X
d If "Yes," indicate the number of Forms 8282 filed during the year	7d	
e Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	
f Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	
g If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	
8 Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?	8	
9 Sponsoring organizations maintaining donor advised funds.		
a Did the sponsoring organization make any taxable distributions under section 4966?	9a	
b Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?	9b	
10 Section 501(c)(7) organizations. Enter:		
a Initiation fees and capital contributions included on Part VIII, line 12	10a	
b Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11 Section 501(c)(12) organizations. Enter:		
a Gross income from members or shareholders	11a	
b Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	
b If "Yes," enter the amount of tax-exempt interest received or accrued during the year	12b	
13 Section 501(c)(29) qualified nonprofit health insurance issuers.		
a Is the organization licensed to issue qualified health plans in more than one state? Note: See the instructions for additional information the organization must report on Schedule O.	13a	
b Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	13b	
c Enter the amount of reserves on hand	13c	
14a Did the organization receive any payments for indoor tanning services during the tax year?	14a	X
b If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation on Schedule O	14b	
15 Is the organization subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see the instructions and file Form 4720, Schedule N.	15	X
16 Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O.	16	X
17 Section 501(c)(21) organizations. Did the trust, or any disqualified or other person engage in any activities that would result in the imposition of an excise tax under section 4951, 4952 or 4953? If "Yes," complete Form 6069.	17	

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

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

☒

Section A. Governing Body and Management

	1a	1b	2	3	4	5	6	7a	7b	8a	8b	9	Yes	No
1a Enter the number of voting members of the governing body at the end of the tax year	28													
If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain on Schedule O.														
b Enter the number of voting members included on line 1a, above, who are independent		28												
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?														
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, trustees, or key employees to a management company or other person?														
4 Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?														
5 Did the organization become aware during the year of a significant diversion of the organization's assets?														
6 Did the organization have members or stockholders?														
7a Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?														
b Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?														
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:														
a The governing body?														
b Each committee with authority to act on behalf of the governing body?														
9 Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses on Schedule O														

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

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

Section C. Disclosure

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

18 Section 6104 requires an organization to make its Forms 1023 (1024 or 1024-A, if applicable), 990, and 990-T (section 501(c)(3)s only) available for public inspection. Indicate how you made these available. Check all that apply.
☒ Own website ☐ Another's website ☒ Upon request ☐ Other (explain on Schedule O)

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

20 State the name, address, and telephone number of the person who possesses the organization's books and records
THE ORGANIZATION - 580-326-3351
209 N 4TH ST, HUGO, OK 74743

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

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

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

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

• List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.

• List all of the organization's **current** key employees, if any. See the instructions for definition of "key employee."

• List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (box 5 of Form W-2; box 6 of Form 1099-MISC, and/or box 1 of Form 1099-NEC) of more than \$100,000 from the organization and any related organizations.

• List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.

• List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

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

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Individual trustee	Officer	Key employee	Highest compensated employee	Former			
(1) REBECCA REYNOLDS EXECUTIVE DIRECTOR	40.00			X				130,582.	0.	0.
(2) SHEREE ENSLEY FISCAL OFFICER	40.00			X				84,153.	0.	0.
(3) TAMI BARNES BOARD MEMBER	1.00	X						0.	0.	0.
(4) BRAD BURGETT SECRETARY/TREASURER	1.50	X		X				0.	0.	0.
(5) DANNY CORNISH BOARD MEMBER	1.00	X						0.	0.	0.
(6) KEVIN CORY BOARD MEMBER	1.00	X						0.	0.	0.
(7) TINA FOSHEE-THOMAS BOARD MEMBER	1.00	X						0.	0.	0.
(8) BRENT FRANKS BOARD MEMBER	1.00 2.00	X						0.	0.	0.
(9) PATSY GUESS BOARD MEMBER	1.00	X						0.	0.	0.
(10) DAVID HAWKINS CHAIRMAN	2.00 1.00	X		X				0.	0.	0.
(11) ANDREA HENKEL BOARD MEMBER	1.00	X						0.	0.	0.
(12) JORDAN HILL BOARD MEMBER	1.00	X						0.	0.	0.
(13) JIA JOHNSON BOARD MEMBER	1.00	X						0.	0.	0.
(14) SHARON JOHNSON BOARD MEMBER	1.00	X						0.	0.	0.
(15) VICKIE LEATHERS BOARD MEMBER	1.00	X						0.	0.	0.
(16) CINDY LOGAN BOARD MEMBER	1.00	X						0.	0.	0.
(17) KARA MANESS BOARD MEMBER	1.00	X						0.	0.	0.

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

(A) Name and title	(B) Average hours per week (list any hours for related organizations below line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC/1099-NEC)	(E) Reportable compensation from related organizations (W-2/1099-MISC/1099-NEC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
(18) SANDRA MEEKS BOARD MEMBER	1.00 1.00	X						0.	0.	0.
(19) DWIGHT SATTERFIELD BOARD MEMBER	1.00	X						0.	0.	0.
(20) LEAH SAVAGE-THOMAS VICE CHAIRMAN	1.50 1.00	X		X				0.	0.	0.
(21) WADE SCOTT BOARD MEMBER	1.00 2.00	X						0.	0.	0.
(22) DAVID SMITH BOARD MEMBER	1.00 1.00	X						0.	0.	0.
(23) WILLIAM SMITH BOARD MEMBER	1.00 1.50	X						0.	0.	0.
(24) CONSUELO SPLAWN BOARD MEMBER	1.00	X						0.	0.	0.
(25) KELLI STACY BOARD MEMBER	1.00	X						0.	0.	0.
(26) JIM BOB SULLIVAN BOARD MEMBER	1.00	X						0.	0.	0.
1b Subtotal								214,735.	0.	0.
c Total from continuation sheets to Part VII, Section A								0.	0.	0.
d Total (add lines 1b and 1c)								214,735.	0.	0.

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

1

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

	Yes	No
3		X
4		X
5		X

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

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

Section B. Independent Contractors

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

(A) Name and business address	(B) Description of services	(C) Compensation
DAVE'S AIR 927 N 4180 RD, HUGO, OK 74743	AIR CONDITIONING AND HEAT SERVICES	156,615.
TOTAL CLEANING SERVICE 6530 VIRGINIA PKWY, MCKINNEY, TX 75071	CLEANING	128,960.
BLACKBURN PLUMBING, 201 SHADY CREEK RD SUITE 107, DURANT, OK 74701	PLUMBING	114,945.
SAMMIE BESHIRS 4531 COUNTY RD 32500, PARIS, TX 75460	CONCRETE FINISHER	109,406.

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

4

SEE PART VII, SECTION A CONTINUATION SHEETS

Form 350	BRIEF COMPANY HISTORY HISTORY, INC.	75
Part VII	Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)	

[illegible]

Part VIII Statement of Revenue

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

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts	1 a Federated campaigns	1a					
	b Membership dues	1b					
	c Fundraising events	1c					
	d Related organizations	1d					
	e Government grants (contributions)	1e	17,761,328.				
	f All other contributions, gifts, grants, and similar amounts not included above	1f	71,332.				
	g Noncash contributions included in lines 1a-1f	1g	\$				
	h Total. Add lines 1a-1f			17,832,660.			
Program Service Revenue		Business Code					
	2 a PROGRAM RECOVERIES		900099	3,993,854.	3,993,854.		
	b PROGRAM FEES AND CONTRACTS		624200	2,804,497.	2,804,497.		
	c						
	d						
	e						
	f All other program service revenue						
g Total. Add lines 2a-2f			6,798,351.				
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			148,974.			148,974.
	4 Income from investment of tax-exempt bond proceeds						
	5 Royalties						
			(i) Real (ii) Personal				
	6 a Gross rents	6a	760,484.				
	b Less: rental expenses	6b	0.				
	c Rental income or (loss)	6c	760,484.				
	d Net rental income or (loss)			760,484.	760,484.		
	7 a Gross amount from sales of assets other than inventory	7a	(i) Securities (ii) Other				
	b Less: cost or other basis and sales expenses	7b	3,240.				
	c Gain or (loss)	7c	-3,240.				
	d Net gain or (loss)			-3,240.			-3,240.
	8 a Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18	8a					
	b Less: direct expenses	8b					
	c Net income or (loss) from fundraising events						
9 a Gross income from gaming activities. See Part IV, line 19	9a						
b Less: direct expenses	9b						
c Net income or (loss) from gaming activities							
10 a Gross sales of inventory, less returns and allowances	10a						
b Less: cost of goods sold	10b						
c Net income or (loss) from sales of inventory							
Miscellaneous Revenue		Business Code					
	11 a MISCELLANEOUS REVENUE		900099	120,670.	120,670.		
	b						
	c						
	d All other revenue						
e Total. Add lines 11a-11d			120,670.				
12 Total revenue. See instructions			25,657,899.	7,679,505.	0.	145,734.	

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Part IX Statement of Functional Expenses

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

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

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21				
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	214,736.	186,820.	27,916.	
6 Compensation not included above to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	9,303,179.	7,847,521.	1,455,658.	
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9 Other employee benefits	2,199,059.	1,794,630.	404,429.	
10 Payroll taxes	767,065.	646,358.	120,707.	
11 Fees for services (nonemployees):				
a Management				
b Legal	1,477,255.	1,352,754.	124,501.	
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A), amount, list line 11g expenses on Sch O.)				
12 Advertising and promotion	228,832.	197,497.	31,335.	
13 Office expenses	1,553,373.	1,495,803.	57,570.	
14 Information technology				
15 Royalties				
16 Occupancy	256,462.	222,130.	34,332.	
17 Travel	640,525.	597,819.	42,706.	
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest	98.	98.		
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	540,935.		540,935.	
23 Insurance	2,235,205.	576,460.	1,658,745.	
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses on line 24e. If line 24e amount exceeds 10% of line 25, column (A), amount, list line 24e expenses on Schedule O.)				
a INDIRECT COSTS	2,193,995.	2,086,172.	107,823.	
b EQUIPMENT AND FACILITIES	1,764,795.	1,554,332.	210,463.	
c FOOD	1,715,849.	1,694,773.	21,076.	
d OTHER EXPENSES	372,685.	327,068.	45,617.	
e All other expenses	597,767.	571,766.	26,001.	
25 Total functional expenses. Add lines 1 through 24e	26,061,815.	21,152,001.	4,909,814.	0.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here ☐ if following SOP 98-2 (ASC 958-720)				

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Part X Balance Sheet

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

		(A) Beginning of year		(B) End of year
Assets	1 Cash - non-interest-bearing	11,495,739.	1	9,830,482.
	2 Savings and temporary cash investments		2	
	3 Pledges and grants receivable, net	2,109,775.	3	1,146,358.
	4 Accounts receivable, net	966,573.	4	455.
	5 Loans and other receivables from any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		5	
	6 Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), and persons described in section 4958(c)(3)(B)		6	
	7 Notes and loans receivable, net	387,426.	7	1,457,434.
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges	26,628.	9	35,815.
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 16,935,338.		
	b Less: accumulated depreciation	10b 8,163,077.		
		7,500,616.	10c	8,772,261.
	11 Investments - publicly traded securities		11	
	12 Investments - other securities. See Part IV, line 11		12	
	13 Investments - program-related. See Part IV, line 11		13	440,737.
	14 Intangible assets		14	
15 Other assets. See Part IV, line 11		15		
16 Total assets. Add lines 1 through 15 (must equal line 33)	22,486,757.	16	21,683,542.	
Liabilities	17 Accounts payable and accrued expenses	1,533,775.	17	1,116,805.
	18 Grants payable		18	
	19 Deferred revenue	6,129.	19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Loans and other payables to any current or former officer, director, trustee, key employee, creator or founder, substantial contributor, or 35% controlled entity or family member of any of these persons		22	
	23 Secured mortgages and notes payable to unrelated third parties	4,828.	23	483.
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D	0.	25	30,019.
	26 Total liabilities. Add lines 17 through 25	1,544,732.	26	1,147,307.
Net Assets or Fund Balances	Organizations that follow FASB ASC 958, check here ☒ and complete lines 27, 28, 32, and 33.			
	27 Net assets without donor restrictions	18,537,944.	27	20,229,575.
	28 Net assets with donor restrictions	2,404,081.	28	306,660.
	Organizations that do not follow FASB ASC 958, check here ☐ and complete lines 29 through 33.			
	29 Capital stock or trust principal, or current funds		29	
	30 Paid-in or capital surplus, or land, building, or equipment fund		30	
	31 Retained earnings, endowment, accumulated income, or other funds		31	
	32 Total net assets or fund balances	20,942,025.	32	20,536,235.
33 Total liabilities and net assets/fund balances	22,486,757.	33	21,683,542.	

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Part XI Reconciliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	25,657,899.
2	Total expenses (must equal Part IX, column (A), line 25)	2	26,061,815.
3	Revenue less expenses. Subtract line 2 from line 1	3	-403,916.
4	Net assets or fund balances at beginning of year (must equal Part X, line 32, column (A))	4	20,942,025.
5	Net unrealized gains (losses) on investments	5	
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	-1,874.
9	Other changes in net assets or fund balances (explain on Schedule O)	9	0.
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 32, column (B))	10	20,536,235.

Part XII Financial Statements and Reporting

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

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

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SCHEDULE A
(Form 990)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.
Attach to Form 990 or Form 990-EZ.
Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

2024

Open to Public
Inspection

Name of the organization

LIFT COMMUNITY ACTION AGENCY, INC

Employer identification number

73-0772321

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

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

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

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

Schedule A (Form 990) 2024

LIFT COMMUNITY ACTION AGENCY, INC

73-0772321 Page 2

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	15441475.	16006863.	17846476.	0.	17842972.	67137786.
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	15441475.	16006863.	17846476.		17842972.	67137786.
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4.						67137786.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
7 Amounts from line 4	15441475.	16006863.	17846476.		17842972.	67137786.
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources	726,373.	767,919.	793,873.	0.	937,741.	3225906.
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
11 Total support. Add lines 7 through 10						70363692.
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2024 (line 6, column (f), divided by line 11, column (f))	14	95.42	%
15 Public support percentage from 2023 Schedule A, Part II, line 14	15	95.59	%
16a 33 1/3% support test - 2024. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	☒		
b 33 1/3% support test - 2023. If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization	☐		
17a 10% -facts-and-circumstances test - 2024. If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization	☐		
b 10% -facts-and-circumstances test - 2023. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the facts-and-circumstances test, check this box and stop here. Explain in Part VI how the organization meets the facts-and-circumstances test. The organization qualifies as a publicly supported organization	☐		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions	☐		

Schedule A (Form 990) 2024

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

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

Section A. Public Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support. (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2020	(b) 2021	(c) 2022	(d) 2023	(e) 2024	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties, and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						
14 First 5 years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here						☐

Section C. Computation of Public Support Percentage

15 Public support percentage for 2024 (line 8, column (f), divided by line 13, column (f))	15	%
16 Public support percentage from 2023 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2024 (line 10c, column (f), divided by line 13, column (f))	17	%
18 Investment income percentage from 2023 Schedule A, Part III, line 17	18	%

19a **33 1/3% support tests - 2024.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

b **33 1/3% support tests - 2023.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ☐

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

Part IV Supporting Organizations

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

Section A. All Supporting Organizations

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

Part IV Supporting Organizations (continued)

	Yes	No
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described on lines 11b and 11c below, the governing body of a supported organization?		
11a		
b A family member of a person described on line 11a above?		
11b		
c A 35% controlled entity of a person described on line 11a or 11b above? If "Yes" to line 11a, 11b, or 11c, provide detail in Part VI.		
11c		

Section B. Type I Supporting Organizations

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

Section C. Type II Supporting Organizations

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

Section D. All Type III Supporting Organizations

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

Section E. Type III Functionally Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions).		
a ☐ The organization satisfied the Activities Test. Complete line 2 below.		
b ☐ The organization is the parent of each of its supported organizations. Complete line 3 below.		
c ☐ The organization supported a governmental entity. Describe in Part VI how you supported a governmental entity (see instructions).		
2 Activities Test. Answer lines 2a and 2b below.		
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify those supported organizations and explain how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.		
2a		
b Did the activities described on line 2a, above, constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.		
2b		
3 Parent of Supported Organizations. Answer lines 3a and 3b below.		
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? If "Yes" or "No," provide details in Part VI.		
3a		
b Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.		
3b		

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

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

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

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

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

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

Section D - Distributions		Current Year
1	Amounts paid to supported organizations to accomplish exempt purposes	1
2	Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	2
3	Administrative expenses paid to accomplish exempt purposes of supported organizations	3
4	Amounts paid to acquire exempt-use assets	4
5	Qualified set-aside amounts (prior IRS approval required - provide details in Part VI)	5
6	Other distributions (describe in Part VI). See instructions.	6
7	Total annual distributions. Add lines 1 through 6.	7
8	Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI). See instructions.	8
9	Distributable amount for 2024 from Section C, line 6	9
10	Line 8 amount divided by line 9 amount	10

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2024	(iii) Distributable Amount for 2024
1 Distributable amount for 2024 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2024 (reasonable cause required - explain in Part VI). See instructions.			
3 Excess distributions carryover, if any, to 2024			
a From 2019			
b From 2020			
c From 2021			
d From 2022			
e From 2023			
f Total of lines 3a through 3e			
g Applied to under distributions of prior years			
h Applied to 2024 distributable amount			
i Carryover from 2019 not applied (see instructions)			
j Remainder. Subtract lines 3g, 3h, and 3i from line 3f.			
4 Distributions for 2024 from Section D, line 7: \$			
a Applied to underdistributions of prior years			
b Applied to 2024 distributable amount			
c Remainder. Subtract lines 4a and 4b from line 4.			
5 Remaining underdistributions for years prior to 2024, if any. Subtract lines 3g and 4a from line 2. For result greater than zero, explain in Part VI. See instructions.			
6 Remaining underdistributions for 2024. Subtract lines 3h and 4b from line 1. For result greater than zero, explain in Part VI. See instructions.			
7 Excess distributions carryover to 2025. Add lines 3j and 4c.			
8 Breakdown of line 7:			
a Excess from 2020			
b Excess from 2021			
c Excess from 2022			
d Excess from 2023			
e Excess from 2024			

Supplemental Information.

Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information.
(See instructions.)

**Schedule B
(Form 990)**
(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

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

OMB No. 1545-0047

Name of the organization LIFT COMMUNITY ACTION AGENCY, INC	Employer identification number 73-0772321
--	---

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

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

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

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

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

☐ 501(c)(3) taxable private foundation

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

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

General Rule

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

Special Rules

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

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

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

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

Name of organization	Employer identification number
LIFT COMMUNITY ACTION AGENCY, INC	73-0772321

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES INDEPENDENCE AVE, SW WASHINGTON, DC 20201	\$ 7,044,265.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
2	HEALTH RESOURCES AND SERVICES ADMINISTRATION 5600 FISHERS LANE ROCKVILLE, MD 20857	\$ 1,291,741.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
3	OKLAHOMA DEPARTMENT OF COMMERCE 900 N STILES AVE OKLAHOMA CITY, OK 73104	\$ 1,141,249.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
4	U.S. DEPARTMENT OF JUSTICE 950 PENNSYLVANIA AVE., NW WASHINGTON, DC 20530	\$ 421,014.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
5	U.S. DEPARTMENT OF AGRICULTURE 1400 INDEPENDENCE AVENUE SW. WASHINGTON, DC 20250	\$ 1,888,727.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
6	OKLAHOMA DEPARTMENT OF EDUCATION 2500 N LINCOLN BLVD OKLAHOMA CITY, OK 73105	\$ 1,489,337.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization	Employer identification number
LIFT COMMUNITY ACTION AGENCY, INC	73-0772321

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	U.S. DEPARTMENT OF LABOR 200 CONSTITUTION AVE NW WASHINGTON, DC 20210	\$ 529,094.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
8	OKLAHOMA DEPARTMENT OF TRANSPORTATION 200 N.E. 21ST STREET OKLAHOMA CITY, OK 73105	\$ 1,732,380.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
9	OKLAHOMA HOUSING FINANCE AUTHORITY 100 NW 63RD ST OKLAHOMA CITY, OK 73116	\$ 780,936.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
10	OKLAHOMA DEPARTMENT OF HUMAN SERVICES 2400 N LINCOLN BLVD OKLAHOMA CITY, OK 73105	\$ 1,022,412.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Employer identification number

73-0772321

[illegible]

Name of organization LIFT COMMUNITY ACTION AGENCY, INC	Employer identification number 73-0772321
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this info. once.) \$ _____
Use duplicate copies of Part III if additional space is needed.

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

SCHEDULE D
(Form 990)
(Rev. December 2024)
Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
Attach to Form 990.

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

OMB No 1545-0047

Open to Public
Inspection

Name of the organization

LIFT COMMUNITY ACTION AGENCY, INC

Employer identification number

73-0772321

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate value of contributions to (during year)		
3 Aggregate value of grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control?	☐ Yes	☐ No
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit?	☐ Yes	☐ No

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

(ii) Assets included in Form 990, Part X \$

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

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

b Assets included in Form 990, Part X \$

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

- 3 Using the organization's acquisition, accession, and other records, check any of the following that make significant use of its collection items (check all that apply).
- a ☐ Public exhibition d ☐ Loan or exchange program
- b ☐ Scholarly research e ☐ Other _____
- c ☐ Preservation for future generations
- 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII.
- 5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

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

- 1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No
- b If "Yes," explain the arrangement in Part XIII and complete the following table:
- | | Amount |
|---------------------------------|--------|
| c Beginning balance | 1c |
| d Additions during the year | 1d |
| e Distributions during the year | 1e |
| f Ending balance | 1f |
- 2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? ☐ Yes ☐ No
- b If "Yes," explain the arrangement in Part XIII. Check here if the explanation has been provided in Part XIII ☐

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

- | | (a) Current year | (b) Prior year | (c) Two years back | (d) Three years back | (e) Four years back |
|--|------------------|----------------|--------------------|----------------------|---------------------|
| 1a Beginning of year balance | | | | | |
| b Contributions | | | | | |
| c Net investment earnings, gains, and losses | | | | | |
| d Grants or scholarships | | | | | |
| e Other expenditures for facilities and programs | | | | | |
| f Administrative expenses | | | | | |
| g End of year balance | | | | | |
- 2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as:
- a Board designated or quasi-endowment _____ %
- b Permanent endowment _____ %
- c Term endowment _____ %
- The percentages on lines 2a, 2b, and 2c should equal 100%.
- 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
- (i) Unrelated organizations? ☐ Yes ☐ No
- (ii) Related organizations? ☐ Yes ☐ No
- b If "Yes" on line 3a(ii), are the related organizations listed as required on Schedule R? ☐ Yes ☐ No
- 4 Describe in Part XIII the intended uses of the organization's endowment funds.

Part VI Land, Buildings, and Equipment

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

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		406,080.		406,080.
b Buildings		7,743,771.	2,498,967.	5,244,804.
c Leasehold improvements		2,175,576.	2,083,929.	91,647.
d Equipment		1,882,556.	655,124.	1,227,432.
e Other		4,727,355.	2,925,057.	1,802,298.
Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, line 10c, column (B))				8,772,261.

Part VII Investments - Other Securities

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

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

Part VIII Investments - Program Related.

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

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

Part IX Other Assets

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

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

Part X Other Liabilities

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

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2) DEPOSITS SUBJECT TO REFUND	30,019.
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. (Column (b) must equal Form 990, Part X, line 25, col. (B))	

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

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

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

1	Total revenue, gains, and other support per audited financial statements	1	27,413,356.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains (losses) on investments	2a	
b	Donated services and use of facilities	2b	1,654,705.
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIII.)	2d	100,752.
e	Add lines 2a through 2d	2e	1,755,457.
3	Subtract line 2e from line 1	3	25,657,899.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	25,657,899.

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

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

1	Total expenses and losses per audited financial statements	1	27,797,541.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	1,654,705.
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIII.)	2d	81,021.
e	Add lines 2a through 2d	2e	1,735,726.
3	Subtract line 2e from line 1	3	26,061,815.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIII.)	4b	
c	Add lines 4a and 4b	4c	0.
5	Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	26,061,815.

Part XIII Supplemental Information

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

PART X, LINE 2:

THE ORGANIZATION QUALIFIES AS AN ORGANIZATION EXEMPT FROM INCOME TAXES UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE AND A SIMILAR STATE STATUTE AND IS NOT SUBJECT TO TAX AT THE ENTITY LEVEL FOR FEDERAL AND STATE INCOME TAX PURPOSES. THE ORGANIZATION ACCOUNTS FOR UNCERTAIN TAX POSITIONS IN ACCORDANCE WITH THE PROVISIONS OF FASB CODIFICATION TOPIC INCOME TAXES. FASB CODIFICATION TOPIC INCOME TAXES CLARIFIES THE ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES AND REQUIRES THE ORGANIZATION TO RECOGNIZE IN THEIR FINANCIAL STATEMENTS THE IMPACT OF A TAX POSITION TAKEN OR EXPECTED TO BE TAKEN IN A TAX RETURN, IF THAT POSITION IS MORE LIKELY THAN NOT TO BE SUSTAINED UNDER AUDIT, BASED ON THE TECHNICAL MERITS OF THE POSITION. MANAGEMENT HAS ASSESSED THE TAX POSITIONS OF THE ORGANIZATION AND DETERMINED THAT NO POSITIONS EXIST THAT REQUIRE ADJUSTMENT OR DISCLOSURE UNDER THE PROVISIONS OF FASB CODIFICATION TOPIC INCOME TAXES.

THE ORGANIZATION FILES INFORMATIONAL RETURN OF ORGANIZATION EXEMPT FROM INCOME TAX (FORM 990) IN THE U.S. FEDERAL JURISDICTION AND OKLAHOMA.

PART XI, LINE 2D - OTHER ADJUSTMENTS:

SOCDC INTERCOMPANY

PART XII, LINE 2D - OTHER ADJUSTMENTS:

SOCDC INTERCOMPANY

Part XIII	Supplemental Information (continued)
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SCHEDULE O
(Form 990)

(Rev. December 2024)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

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

Attach to Form 990 or Form 990-EZ.

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

OMB No. 1545-0047

**Open to Public
Inspection**

Name of the organization

LIFT COMMUNITY ACTION AGENCY, INC

Employer identification number

73-0772321

FORM 990, PART I, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:
THROUGH SERVICE AND COLLABORATION LEADING TO SELF-SUFFICIENCY.

FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS:
WITH APPROXIMATELY \$9.9 MILLION IN RURAL DEVELOPMENT SECTION 523
ADMINISTRATIVE BUDGETS. 6 OF THE GRANTEEES OPERATE A REPAIR AND REHAB
GRANT TO PROVIDE TECHNICAL ASSISTANCE FOR HOMEOWNERS TO HAVE A SECENT,
SAFE, SANITARY, AND INCREASED ENERGY EFFICIENCY OF THEIR HOMES.

FORM 990, PART III, LINE 4C, PROGRAM SERVICE ACCOMPLISHMENTS:
MONTHS, AND 83 CHILDREN, FOR A TOTAL OF 643 PARTICIPANTS SERVED.
HEALTHY START WAS AWARDED THE FIRST SAFE KIDS TULSA, AGENCY OF THE YEAR
AWARD. THIS AWARD WAS GIVEN FOR THE EXEMPLARY SERVICES TO EDUCATE AND
PROPERLY INSTALL CAR SEATS IN THE COMMUNITIES WE SERVE. CURRENTLY THERE
ARE 11 CAR SEAT TECHS IN THE HEALTHY START PROGRAM. HEALTHY START HAS
ALSO HAD ONE EMPLOYEE PASS THE CERTIFIED LACTATION COUNCILOR EXAM AND
THREE EMPLOYEES BECOME CERTIFIED PRE-NATAL DOULAS. RX FOR OKLAHOMA 3
INDIVIDUALS WERE ASSISTED IN GETTING THEIR PRESCRIPTIONS FOR FREE OR
REDUCED COST. VICTIMS ADVOCACY SERVICES PROVIDES SUPPORT SERVICES FOR
VICTIMS OF CRIME. 120 VICTIMS WERE SERVED IN 2024. 1,420 VICTIMS
RECEIVED SERVICES SINCE INCEPTION IN JULY 2015. EMERGENCY ASSISTANCE -
THROUGH FUNDING RECEIVED FROM EMERGENCY FOOD & SHELTER PROGRAM, AND
LOCAL DONATIONS TO THE LIFT EMERGENCY FUND AND THROUGH SALVATION ARMY
BELL RINGING, A TOTAL OF 57 INDIVIDUALS/FAMILIES RECEIVED MUCH NEEDED
EMERGENCY ASSISTANCE. SAFE PLACE HEALING HEARTS - SERVED 195 VICTIMS IN
AREAS OF DOMESTIC VIOLENCE, SEXUAL ASSAULT, DATING VIOLENCE, AND
STALKING VICTIMS. SINCE INCEPTION IN 2017 A TOTAL OF 2,177 VICTIMS HAVE
BEEN SERVED. YOUTH BUILD - PROVIDED PATHWAYS TO EDUCATION AND
EMPLOYMENT THROUGH PROVISION OF HIGH SCHOOL EDUCATION, CONSTRUCTION
APPRENTICESHIP TRAINING AND LIFE SKILLS ACTIVITIES. SERVED 68
INDIVIDUALS SINCE RECEIVING NEW GRANT AWARD, 47 OBTAINED THEIR HIGH
SCHOOL DIPLOMA WHILE 15 ARE CURRENTLY ENROLLED; 68 HAVE RECEIVED OSHA
10 CERTIFICATION; 63 EARNED THEIR HBI-PACT CONSTRUCTION CERTIFICATION,
AND 45 EARNED THEIR FIRST AID/CPR CERTIFICATIONS. TRI-COUNTY OPIOID -
EDUCATED 35 VOLUNTEER FIRE DEPARTMENTS ON HOW TO ADMINISTER
NARCAN/NALOXONE, OPIOID MISUSE, AND STIGMA SURROUNDING OPIOID USE
DISORDER. CONDUCTED 5 MEDICATIONS TAKE BACK EVENTS AND RECEIVED 77 LBS
OF PRESCRIPTION MEDICINE FOR PROPER DISPOSAL. PARTNERED WITH PARENTS
HELPING PARENTS TO START A PARENT SUPPORT GROUP FOR PARENTS WITH
CHILDREN DEALING WITH ADDICTION ISSUES OR WHO ARE IN RECOVERY. STAFF
PROVIDED MENTAL HEALTH FIRST RESPONDER CLASSES TO 40 DIFFERENT
COMMUNITY MEMBERS IN 2024 INCLUDING STAFF FROM PUSHMATAHA, CHOCTAW, AND
MCCURTAIN COUNTY SHERIFF DEPARTMENT. PROVIDED 10 TRAINING COURSES FOR
FENTANYL TESTING KITS WITH PROBATION & PAROLE, CHOCTAW CO & PUSH CO
JAIL, ANTLERS & HUGO PD. HOSTED A MENTAL HEALTH/SUBSTANCE ABUSE AND LAW
ENFORCEMENT EVENT IN MAY OF 2024 TO PROVIDE LOCAL MH/SA PROFESSIONALS
WITH FREE CONTINUING EDUCATION CREDITS AND LOCAL LAW ENFORCEMENT WITH
FREE CLEET HOURS. 85 PROFESSIONALS ATTENDED THE TRAINING.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:
OTHER PROGRAM SERVICES 4: TRANSPORTATION - PROVISION OF PUBLIC
TRANSPORTATION SERVICES, FUNDED BY FEDERAL GRANTS, LOCAL CONTRACTS, AND

Name of the organization	Employer identification number
LIFT COMMUNITY ACTION AGENCY, INC	73-0772321

PARTICIPATION FEES. TRANSPORTATION EXPENSES ARE APPROXIMATELY 7% OF PROGRAM SERVICE EXPENSES. 311,235 MILES WERE DRIVEN WITH ACCOUNTING FOR 57,967 PASSENGER TRIPS PROVIDED BY A FLEET OF 38 VEHICLES. 11,925 ELDERLY CLIENTS WERE SERVED AND 10,523 TRIPS FOR PASSENGERS WITH DISABILITIES WERE PROVIDED. OTHER PROGRAM SERVICES 5: ECONOMIC DEVELOPMENT - FOSTER ECONOMIC AND INDUSTRIAL DEVELOPMENT IN A THREE COUNTY ENTERPRISE COMMUNITY. ECONOMIC DEVELOPMENT EXPENSES ARE APPROXIMATELY 4% OF TOTAL PROGRAM SERVICE EXPENSES. INTERMEDIARY PROGRAM LIFT WAS DESIGNATED BY THE RURAL HOUSING SERVICES DIVISION OF USDA/RURUAL DEVELOPMENT AS AN INTERMEDIARY ASSISTING CERTIFIED LOAN PACKAGERS IN TEXAS, NORTH DAKOTA, SOUTH DAKOTA, KANSAS, ARKANSAS, LOUISIANA, MISSOURI, NEBRASKA, AND OKLAHOMA. IN 2024, WE ASSISTED 40 NON-PROFIT AGENCIES IN THOSE STATES IN SUBMITTING 109 PACLAGERS TO RURAL DEVELOPMENT FOR REVIEW AND ASSISTED WITH 49 CLOSINGS. STATE PARKS OPERATED BY LIFT INCLUDE: CLAYTON LAKE STATE PARK, HUGO LAKE STATE PARK, AND RAYMOND GARY STATE PARK.
EXPENSES \$ 3,020,248. INCLUDING GRANTS OF \$ 0. REVENUE \$ 1,901,953.

FORM 990, PART VI, SECTION B, LINE 11B:
A DRAFT OF THE TAX RETURN IS PROVIDED TO THE EXECUTIVE DIRECTOR AND THE BOARD OF DIRECTORS FOR REVIEW. A COPY IS MADE AVAILABLE TO ALL MEMBERS OF THE BOARD OF DIRECTORS. DOCUMENTATION IS ON FILE IN THE ADMINISTRATIVE OFFICE.

FORM 990, PART VI, SECTION B, LINE 12C:
ANNUAL REVIEW AND TRAINING IS HELD DURING BOARD MEETING. BOARD MEMEBERS REVIEW A LIST OF EMPLOYEES, A LIST OF VENDORS, AND DISCLOSE ANY RELATIONS. POLICY AND DISCLOSURE ARE SIGNED.

FORM 990, PART VI, SECTION B, LINE 15:
LINE 15A - BOARD MEMBERS REVIEW AND SET COMPENSATION FOR THE EXECTUIVE DIRECTOR ON AN ANNUAL BASIS. LINE 15B - OTHER STAFF ARE REVIEWED ANNUALLY, COMPENSATION IS SET ON PAY SCALE AND AVAILABILITY OF FUNDS.

FORM 990, PART VI, SECTION C, LINE 19:
UPON REQUEST DOCUMENTS MAY BE VIEWED IN THE ADMINISTRATION OFFICE. SOME DOCUMENTS ARE ANNUALLY POSTED ON THE WEBSITE INCLUDING AUDITS, FORM 990, AND AGENCY BUDGETS. THREE YEARS ARE READILY ACCESSIBLE VIA THE AGENCY WEBISTE.

FORM 990, PART XII, LINE 2C:
THERE HAS BEEN NO CHANGE IN THE REVIEW PROCESS

**SCHEDULE R
(Form 990)**

(Rev. January 2025)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

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

Attach to Form 990.

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

OMB No. 1545-0047

Open to Public
Inspection

Name of the organization

LIFT COMMUNITY ACTION AGENCY, INC

Employer identification number

73-0772321

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

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

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

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
BELMONT PLACE SENIOR HOUSING - 73-1664924 209 N 4TH ST HUGO, OK 74743	HOUSING SERVICES	OKLAHOMA	501(C)(3)	LINE 7			X
CLAYTON PLACE SENIOR HOUSING - 20-2371051 209 N 4TH ST HUGO, OK 74743	HOUSING SERVICES	OKLAHOMA	501(C)(3)	LINE 7			X
KIAMICHI PLACE SENIOR HOUSING - 20-8359980 209 N 4TH ST HUGO, OK 74743	HOUSING SERVICES	OKLAHOMA	501(C)(3)	LINE 7			X
SOUTHEAST OKLAHOMA COMMUNITY DEVELOPMENT CORPORATION - 20-2554357, 209 N 4TH ST, HUGO, OK 74743	COMMUNITY AND NEIGHBORHOOD DEVELOPMENT	OKLAHOMA	501(C)(3)	LINE 7			X

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

Schedule R (Form 990) (Rev. 1-2025)

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

[illegible]

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

[illegible]

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.**Note:** Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.**1** During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?**a** Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity**b** Gift, grant, or capital contribution to related organization(s)**c** Gift, grant, or capital contribution from related organization(s)**d** Loans or loan guarantees to or for related organization(s)**e** Loans or loan guarantees by related organization(s)**f** Dividends from related organization(s)**g** Sale of assets to related organization(s)**h** Purchase of assets from related organization(s)**i** Exchange of assets with related organization(s)**j** Lease of facilities, equipment, or other assets to related organization(s)**k** Lease of facilities, equipment, or other assets from related organization(s)**l** Performance of services or membership or fundraising solicitations for related organization(s)**m** Performance of services or membership or fundraising solicitations by related organization(s)**n** Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)**o** Sharing of paid employees with related organization(s)**p** Reimbursement paid to related organization(s) for expenses**q** Reimbursement paid by related organization(s) for expenses**r** Other transfer of cash or property to related organization(s)**s** Other transfer of cash or property from related organization(s)

	Yes	No
1a		X
1b		X
1c		X
1d	X	
1e		X
1f		X
1g		X
1h		X
1i		X
1j		X
1k		X
1l		X
1m		X
1n		X
1o		X
1p		X
1q		X
1r		X
1s		X

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved
(1) BELMONT PLACE SENIOR HOUSING	D	217,351.	FAIR VALUE
(2) KIAMICHI PLACE SENIOR HOUSING	D	123,564.	FAIR VALUE
(3) CLAYTON PLACE SENIOR HOUSING	D	227,562.	FAIR VALUE
(4) SOUTHEAST OKLAHOMA COMMUNITY DEVELOPMENT	D	522,002.	FAIR VALUE
(5)			
(6)			

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

[illegible]

Part VII	Supplemental Information
----------	--------------------------

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

TAX RETURN FILING INSTRUCTIONS

OKLAHOMA FORM 512E

FOR THE YEAR ENDING

December 31, 2024

Prepared For:

Lift Community Action Agency, Inc
209 N 4th St
Hugo, OK 74743

Prepared By:

Landmark PLC, CPAs
3101 S 70th Street
Fort Smith, AR 72903

To be Signed and Dated By:

The authorized individual(s).

Amount of Tax:

Total Tax	\$	0
Less: payments and credits	\$	0
Plus: other amount		0
Plus: interest and penalties	\$	0
No payment required	\$	

Overpayment:

Credited to your estimated tax	\$	0
Other amount	\$	0
Refunded to you	\$	0

Make Check Payable To:

Not applicable

Mail Tax Return and Check (if applicable) To:

Oklahoma Tax Commission
P.O. Box 26800
Oklahoma City, OK 73126-0800

Return Must be Mailed On or Before:

December 15, 2025

Special Instructions:

Form 512-E
2024

Oklahoma Return of Organization Exempt from Income Tax

Section 501(c) of the Internal Revenue Code

PART 1

For the year January 1 - December 31, 2024, or other taxable year beginning:

2024

ending:

Name of Organization:

LIFT COMMUNITY ACTION AGENCY, INC

Federal Employer Identification Number:

73-0772321

Date Qualified for Tax Exempt Status:

Address (Number and Street):

209 N 4TH ST

City:

HUGO

State or Province:

OKLAHOMA

Country:

ZIP or Foreign Postal Code:

74743

Place an 'X' if: (1) ☐ Initial Return (2) ☐ Final Return (3) ☐ Amended Return (See Schedule 512-E-X on page 2)**PART 2: STATEMENT OF UNRELATED BUSINESS TAXABLE INCOME**

(Please read instructions on pages 3-4)

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

Total Federal

Allocable Oklahoma

INCOME SUBJECT TO TAX

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

TAX COMPUTATION

- | Line | Description | Total Federal | Allocable Oklahoma |
|------|--|---------------|--------------------|
| 5 | Tax at 4% of line 4. If trust, see rate schedule on page 3 and place an '1' in the box. If recapturing the Oklahoma Affordable Housing Tax Credit, add the recaptured credit here and enter a '2' in the box. If making an Okla. installment payment pursuant to IRC Sec. 965(h) and 68 OS Sec. 2368(K), add the installment payment here and enter a '3' in the box | | 00 |
| 6 | Less: Other Credits Form (total from Form 511-CR) | | 00 |
| 7 | Balance of tax due (line 5 minus line 6, but not less than zero) | | 00 |
| 8 | 2024 Oklahoma estimated tax and extension payments and prior year carryforward | | 00 |
| 9 | Oklahoma withholding (provide Form 1099, Form 500-A, Form 500-B or other withholding statement) | | 00 |
| 10 | Amount paid with original return and amount paid after it was filed (amended return only) | | 00 |
| 11 | Any refunds or overpayment applied (amended return only) | | 00 |
| 12 | Total of lines 8 through 11 | | 00 |
| 13 | Overpayment (if line 12 is larger than line 7 enter amount overpaid) | | 00 |
| 14 | Amount of line 13 to be credited to 2025 estimated tax (original return only) | | 00 |



Oklahoma Return of Organization Exempt from Income Tax

Name of Organization:

LIFT COMMUNITY ACTION AGENCY, INC

Federal Employer Identification Number:

73-0772321

Amount from line 14 on page 1

00

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

15 Donations from your refund

☐

\$2

☐

\$5

☐

\$

15

00

16 Add lines 14 and 15 and enter amount

16

00

17 Amount to be refunded to you (line 13 minus line 16)

Refund 17

00

Direct Deposit Note: →

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

Is this refund going to or through an account that is located outside of the United States?

☐

Yes

☐

No

Deposit my refund in my:

☐

Checking Account

☐

Savings Account

Routing Number:

Account Number:

18 Tax Due (if line 7 is larger than line 12 enter tax due)

Tax Due 18

00

19 For delinquent payment, add penalty of 5% plus interest at 1.25% per month

19

00

20 Underpayment of estimated tax interest

Annualized ☐

20

00

21 Total tax, penalty and interest due - Add lines 18-20; pay in full with return

Balance Due 21

00

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

Signature of Officer or Trustee

R Porter

Date

9/22/2025

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

☐

Signature of Preparer

Letitia S. Talkington

Date

9/16/25

Printed Name

REBECCA REYNOLDS

Title

EXECUTIVE DIREC

Phone Number

Printed Name of Preparer

LETITIA S. TALKINGTON

Phone Number

47948457

Preparer's PTIN:

P00082380

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

A Did you file an amended Federal income tax return? ☐ Yes ☒ No

Provide a copy of the amended Federal return and a copy of "Statement of Adjustment", IRS refund check or deposit slip.

B If this return is being filed due to a Federal audit, provide a complete copy of the RAR.

C Explanation or reason for amended return (provide all necessary schedules):

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

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

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

LIFT

Community Action Agency, Inc.

*Rebecca Porter, Executive Director
William Smith, 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 October, 2025, in a regular meeting of the Board of Directors of LIFT Community Action Agency, Inc.

William Smith, Chairman
Board of Directors
LIFT Community Action Agency, Inc.



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

This institution is an equal opportunity employer



LIFT

Community Action Agency, Inc.

Rebecca Porter, Executive Director
William Smith, Board Chairman

BOARD OF DIRECTORS 2026 MEETING DATES

DATE	LOCATION	TIME
January 13, 2026	1005 South 5 th St. Hugo, OK	10:00 AM
February 10, 2026	1005 South 5 th St. Hugo, OK	10:00 AM
March 10, 2026	1005 South 5 th St. Hugo, OK	10:00 AM
April 14, 2026	1005 South 5 th St. Hugo, OK	10:00 AM
May 12, 2026	1005 South 5 th St. Hugo, OK	10:00 AM
June 9, 2026	1005 South 5 th St. Hugo, OK	10:00 AM
July 14, 2026	1005 South 5 th St. Hugo, OK	10:00 AM
August 11, 2026	1005 South 5 th St. Hugo, OK	10:00 AM
September 8, 2026	1005 South 5 th St. Hugo, OK	10:00 AM
October 13, 2026	1005 South 5 th St. Hugo, OK	10:00 AM
November 10, 2026	1005 South 5 th St. Hugo, OK	10:00 AM
December 8, 2026	1005 South 5 th St. Hugo, OK	10:00 AM

Rebecca Porter, Executive Director

Date

Filed at the office of the clerk at _____ AM/PM on _____

Signed: _____

County Clerk

Date



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

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POLICY COUNCIL OPERATING PROCEDURES

ARTICLE I NAME

The name of the organization shall be the Head Start/EHS/EHS-CC Policy Council. The principal office of this Council will be located at 400 South “K” Street, Hugo, Oklahoma, 74743.

ARTICLE II PURPOSE

The purpose of this Policy Council is to be responsible for the direction of the Head Start program, including program design and operation, and long- and short-term planning goals and objectives in. Performance Standards 1301.3 – 1301.6 and Appendix 642 (c) (2)

1. Policy Councils and Policy Committees must work in partnership with key management staff and the governing body to develop, review, and approve or disapprove the following policies and procedures 642 (c)(2)(D)(i)-(vii)
 - (i) Activities to support the active involvement of parents in supporting program operations, including policies to ensure that the Head Start agency is responsive to community and parent needs.
 - (ii) Program recruitment, selection, and enrollment priorities.
 - (ii) Applications for funding and amendments to applications for funding for programs under this subchapter, prior to submission of applications described in this clause.
 - iv) Budget planning for program expenditures, including policies for reimbursement and participation in policy council activities.
 - (v) Bylaws for the operation of the policy council.
 - (vi) Program personnel policies and decisions regarding the employment of program staff, consistent with paragraph (1)(E)(iv)(IX), including standards of conduct for program staff, contractors, and volunteers and criteria for the employment and dismissal of program staff.
 - (vii) Developing procedures for how members of the policy council of the Head Start agency will be elected.
 - (viii) Recommendations on the selection of delegate agencies and the service areas for such agencies.
2. Serve as a link to the Parent Committees, grantees, public and private organizations, and the communities they serve.
3. Assist Parent Committees in communicating with parents enrolled in all program options to ensure that they understand their rights, responsibilities, and opportunities in Early Head Start, EHS-CC and Head Start, and to encourage their participation in the program.

4. Assist in recruiting volunteer services from parents, community organizations, and assist in the mobilization of community resources to meet identified needs.

ARTICLE III MEMBERSHIP

Section I

The Policy Council shall consist of at least 51% of parents/guardians of Head Start/EHS/EHS-CC children presently enrolled in the HS/EHS/EHS-CC Program. A parent/guardian will be elected from each Head Start classroom, Early Head Start center and Early Head Start-Child Care Center as a representative of the Policy Council. Community Representatives will include volunteers from the local community: businesses; public or private community, civic, and professional organizations; and others who are familiar with resources and services for low-income children and families, including the parents of formerly enrolled children. Common Community Representatives include: Governing Board members, Representatives with Public School experience, and Department of Health and Human Services representatives.

Section II

In the absence of a quorum, the Executive Committee may convene to take actions on behalf of the Policy Council. Those actions shall be ratified at the next regularly scheduled meeting.

Section III

Policy Council representatives will be elected by their center parent committee at the center level and then elected in September to the Policy Council.

Section IV: Term of Office

Policy Council members shall serve for a term of one (1) year. No member shall serve on Policy Council as a parent member and/or community representative for more than five (5) years.

Section V: Voting Right

Each member of the Policy Council shall have one (1) vote. There shall be no proxy voting for any member. Alternates can vote in the absence of the Policy Council representative.

Section VI: Termination of Membership

A member of the Policy Council can be dismissed by two-thirds (2/3) vote of the Policy council or if he or she is absent from two (2) consecutive meetings without having submitted a legitimate excuse in writing to the Policy Council Chairperson prior to the meeting.

Section VII: Resignation

If a member chooses to resign, he or she shall give a written or verbal statement of resignation.

Section VIII: Vacancy

Any Parent Committee shall elect within thirty (30) days a new parent member to the Policy Council. Standing alternates automatically become Policy Council members whenever there is a vacancy on the Council. If a vacancy occurs from a community representative, the parent members must approve any replacements.

Section IX: Nepotism

In accordance with the Grantee Agency's Personnel Policies and Procedures and Performance Standards, no person can serve as a member of the Policy Council while he/she is employed by the agency or related to an employee of the agency.

Section X: Duties

All members of this Policy Council should attend meetings regularly. Arrive on time for all Policy Council meetings. Actively participate in meetings by reading the agenda prior to the meetings and discussing matters to be considered with other parents in the center he or she represents. Keep informed of the Policy Council purpose, plans and progress. Report back to the Parent Committee in the center he or she represents. Debate the issues and not persons.

Section XI: Reimbursement

Policy Council members will receive reimbursement for mileage paid at the agencies established mileage reimbursement rate and Head Start will pay the cost of children of Policy Council members to attend daycare during Policy Council meetings to ensure parents are able to attend. Other reasonable expenses will be addressed on a case by case basis.

ARTICLE IV OFFICERS

Section I

The Policy Council shall elect a chairperson, vice chairperson and secretary.

Section II

Each officer shall be elected by the full membership of the Head Start/Early Head Start/Early Head Start – Child Care Policy Council once the full Policy Council has been seated and shall serve a term of one (1) year. Officers shall serve from September through September of each year until a new Council is organized.

Section III: Removal

Any officer or member of the Policy Council who fails to perform his or her duties as outlined above can be removed by a simple majority vote of the Council.

Section IV: Chairperson

The chairperson shall perform the following duties:

1. Preside at all meetings
2. Talk no more than necessary when presiding
3. Call meetings to order and formally close them
4. Have an understanding of the Head Start/EHS/EHS-CC Performance Standards and Operating Procedures of the Policy Council
5. Refrain from entering into debates of questions before assembly
6. Extend every courtesy to the discussions of the motions
7. Formally close the meeting

8. Note whether a quorum is present
9. Appoint chairperson for all committees
10. Explain, or designate someone to explain, each motion before it is voted upon, and vote to break a tie.

Section V: Vice-Chairperson

The vice-chairperson shall perform the following duties:

1. Preside in the absence of chairperson or whenever chairperson temporarily vacates the chair
2. In case of resignation or death of the chairperson, the vice-chairperson shall assume the office until a permanent chairperson is elected.
3. Report monthly to the Policy Council on the activities of the committees on which he or she serves

Section VI: Secretary

The secretary shall perform the following duties:

1. Review minutes of previous meeting for items of business to be considered, and for Board recommendations to be presented
2. Keep a copy of the Operating Procedures, standing rules, list of members, list of unfinished business and a copy of the agenda
3. Record accurate minutes of each meeting
4. Mail copies of the minutes of the previous meeting to each Policy Council member five(5) days in advance of the next scheduled monthly meeting; confirm that a copy is maintained in the Head Start/EHS/EHS-CC Administrative office

Section VII: Minutes

1. The secretary of the Policy Council is responsible for written minutes of all regularly scheduled meetings. In the absence of the secretary, the chairperson shall appoint someone to record the meeting.
2. Minutes of all meetings shall be typed and signed by the secretary for the file. Staff will assist in providing this technical assistance.
3. Typed minutes of the previous meetings shall be distributed at least five (5) days prior to the next regularly scheduled meeting to all Policy Council members.

ARTICLE V Committees

Section I

The Policy Council shall appoint such committees as are necessary to properly conduct its business, including, but not limited to the following: Personnel Committee, Grievance Committee, and special committees, as needed.

Section II

Standing committees shall include Personnel, Grievance, Finance and Executive. Special committees shall be appointed by the Policy Council chairperson, as needed.

Section III

Executive Committee shall consist of the officers of the Council. The Executive Committee may transact business in the absence of a quorum. In extreme matters, the chairperson may poll the members of the committee by telephone to secure timely decisions on important business.

Section IV

As stipulated in the functions of Chart A, Program Governance, the Policy Council will discuss the Grantee's Personnel Policies and Procedures and make recommendations to the Policy Council prior to the Council approving said personnel policies and procedures. The Personnel Committee will interview and recommend persons to be hired to fill vacancies in the staff with the final selection made by the Executive Director.

Section V

As stipulated in the functions of the Policy Council, the Grievance Committee shall hear grievances from the community and from parents who have followed grievance procedures at the Parent Committee about the program and make recommendations to the Policy Council and Director to resolve these complaints.

Section VI

Special Committees may be appointed by the chairperson or Policy Council as the need arises.

Committee terms of office:

1. A committee member's term of office will be for one (1) year or less. A special committee may be appointed for a shorter or special period of time with Policy Council Committee approval.
2. A Policy Council chairperson shall fill any committee vacancy that may occur.

ARTICLE VI Policy Council Meetings

Section I: Regular Meetings

Regular meetings will be conducted monthly in a location to be decided by the Council. The Executive committee will meet as needed. All Policy Council members will be provided with specific directions to the meeting site.

Section II

Special meetings may be called by the chairperson on an as needed basis or by majority of the Policy Council members.

Section III

Regular meetings shall be held at designated sites or at any agreed to location as determined by a majority of the Policy Council.

Section IV: Notices of Meetings

Notice of regular meetings shall be mailed at least five (5) calendar days prior to the date of a regular scheduled meeting.

Section V

One third of the members of the Policy Council must be present to constitute a quorum for regular or special meetings to transact business.

ARTICLE VII
Amendments

Proposed amendments shall be submitted to the Policy Council for consideration. Operating procedures shall be amended by a two-third (2/3) vote of the Policy Council.

IMPASSE POLICY

The following policy is developed in order to have a set of procedures should any impasse in decision making is reached by the Governing Board and Policy Council concerning three specific matters.

1. Hiring or dismissing the Head Start/EHS/EHS-CC Director and/or Staff member(s);
2. Preparing request for funds and proposed work programs prior to submission to the Administration for Children and Families (ACF); and
3. Making major changes in budget and work programs while the program is in operation.

Concurrence of the impasse policy procedures must bear the signature of each member of the group.

**Governing Board/Policy Council
Conflict Resolution/Impasse Procedure**

- A. Impasse occurs when the Grantee Board of Directors proposes one or more of the following and the Policy Council does not approve at a scheduled Policy Council meeting:
1. Establish goals of program and develop ways to meet them within Administration for Children and Families (ACF) Guidelines.
 2. Determine delegate agencies and areas in the community in which Head Start/EHS/EHS-CC programs will operate.
 3. Develop plans to use all available community resources in the program.
 4. Establish criteria for selection of children within applicable laws and ACF guidelines.
 5. Determine the composition of the appropriate Policy Council and the method for setting it up.
 6. Determine what services should be provided from the Central Office.
 7. Determine the Head Start/EHS/EHS-CC personnel policies for grantee agency.
 8. Hire or dismiss the Head Start/EHS/EHS-CC Director and/or any staff member.
 9. Prepare request for funds and proposed work program prior to sending to ACF.
 10. Make major changes in budget and work program while program is in operation.
 11. Make major changes in budget and work program while program is in operation.
 12. Provide information needed for pre-review to ACF.
- B. Impasse occurs when the Policy Council proposes the above mentioned items and the Grantee Board does not agree by the time of the next regularly scheduled Board meeting. The Policy Council is afforded an equal and reciprocal opportunity to initiate all impasse procedures.
- C. Impasse occurs when the Policy Council establishes a method of hearing and resolving community complaints about the program and the Grantee Board does not agree by the time of the next regularly scheduled Policy Council meeting.

Preliminary Procedures

1. After informal discussions, if the Grantee Board believes the Policy Council will not approve a decision and the Grantee Board wish to formalize the approval process, they should notify the Policy Council in writing. The notice shall contain a statement of the reasons in support of the proposed decision or action.
2. Within 10 days after receipt of the notice, the Policy Council shall hold a special meeting for consideration of the Grantee Board proposed decision or action.
3. Immediately after the special meeting, the Policy Council shall notify the Grantee Board in writing of its approval or disapproval of the proposed decision or action. If the notice is of disapproval, it shall contain a statement of the reason.
4. In the event of a disapproval, and if the Grantee Board desires further consideration of the matter, they shall initiate a meeting with the Policy Council for the purpose of attempting to resolve their differences.
5. If, after these efforts, the Grantee Board and Policy Council are unable to reach agreement, a conference committee will be convened consisting of two members from each body for purpose of resolving the differences.
6. If, after these efforts, the Grantee Board and the Policy Council are unable to reach agreement, the proposed decision or action shall not be taken; in that case, the Grantee Board must invoke the arbitration procedures if it is unable to abide by the decision of the Policy Council.

Arbitration Procedure

Where there is impasse between the Grantee Board and the Policy Council, the Grantee Board must require that it be submitted to binding arbitration in accordance with the following rules and procedures:

1. Arbitration Panel Composition

The arbitration shall be conducted by a panel of three (3) arbiters, one to be designated by the Grantee Board, one to be designated by the Policy Council, and the third, who will be the chairperson of the arbitration panel, to be designated by the other two members. The arbiters shall be impartial persons of good reputation and standing in the community and shall not be associated with the Head Start/EHS/EHS-CC program or the Grantee Agency. If the two arbiters first designated are unable to agree upon a third arbiter who will serve within seven (7) days after the designation of the second of them, it is recommended they will request the state or local bar association or the American Arbitration Association to name one of its members who would be willing to serve as chairman. None of the arbiters shall be relatives of any of the parties.

2. Notice or Arbitration

When the Grantee Board decides to submit the impasse to arbitration, it shall notify the Policy Council in writing, that the impasse is to be resolved by binding arbitration. The notice shall include:

- (A) A statement of the issue on which the Grantee Board and the Policy Council are at impasse.
- b. The name and address of the person the Grantee Board has designated as a member of the arbitration panel.
- c. A request that the Policy Council designate a member of the arbitration panel within fourteen (14) days of the receipt of the notice and instruct him/her to communicate immediately with the person designated by the Grantee Board for the purpose of selecting the third member of the panel; and,
- d. The Grantee Board shall send a copy of the notice to the Head Start Regional Office.

3. Failure to Designate Arbiter

Failure by the Policy Council to designate an arbiter within fourteen (14) days of receipt of the Notice of Arbitration shall be a default, and shall be considered to be approval of the Grantee Board proposed action.

4. Preliminary Matters

- a. The Arbitration Panel shall schedule the arbitration hearing within a reasonable time but not more than 20 days after the designation of a third arbiter.
- b. The hearing shall be held in the locality of the Head Start agency, but not at the agency, at a place fixed by the Arbitration Panel with consideration for the convenience of the parties.
- c. The Grantee Board and the Policy Council are the parties to the arbitration hearing.
- d. The Grantee Board shall assume any expenses entailed by the arbitration and, together with the Policy Council, shall provide clerical and other support as needed, to be shared equally.

5. Proceedings

The duty of the arbitration panel is to resolve only the issues in dispute as expeditiously and fairly as possible at the minimum expense to the parties involved.

The proceedings of the arbitration panel shall consist of:

- a. Oral presentation of the Policy Council's position, including minority views, if there are any.
- b. Oral presentations of the Grantee Board's position, including minority views, if there are any.
- c. Response by both parties to such questions as the panel wishes to ask.
- d. Informal cross examination of each party by the other, within the limits allowed by the panel.
- e. Such additional presentation of oral or written materials as the panel deems necessary to fully appraise it of relevant facts for an informed decision. The parties may suggest to the panel additional relevant witnesses or materials that would be helpful to the panel
- f. If the panel needs additional material such as budget statements, Head Start regulations or other materials of that nature, the Grantee Board has the duty to provide the panel with such documents. The policy Council may also present similar materials if it so desires.

6. Standard of Conduct

- a. Both parties are obligated to act in good faith before and during the proceedings.

Neither party may communicate with the arbitrators once the panel has been selected except at formal meetings attended by all parties. Any attempt to intimidate an arbitrator shall be reported to the Regional Office and shall result in a default judgment against the party guilty of it.

- b. Refusal to comply with directions, continued use of delaying tactics by any person at the hearing, or other obstructive tactics shall constitute grounds for immediate exclusion of such person from the hearing by the chairperson.
- c. Any decision on compromise reached must adhere to all appropriate Federal regulations and policies regarding the administration and operation of the Head Start program.

7. Compromise

The arbitration procedures does not preclude the parties from compromising their differences and reaching a settlement, so long as no final decision has been issued by the panel.

8. Post hearing Procedures and Decisions

- a. The arbitration panel shall issue its decision in writing fifteen (15) days after the panel meeting. Copies shall be sent promptly to the grantee, the Policy Council, the Regional Office, the Grantee Board and the Executive Director.
- b. The final decision shall be binding on both parties and there shall be no appeal.

AGENCY IMPASSE POLICY STATEMENT

Name: _____ Grantee Agency

Name: _____ Grantee Agency Executive Director

Chairperson _____ Governing Board

Chairperson _____ Policy Council

Governing Board

Policy Council

Members:

Step One - Negotiation

Members of the Governing Board and Policy Council agree to negotiate in good faith in an attempt to adjust the differences between the two groups to reach a consensus agreement concerning any impasse issue. The negotiation effort shall be conducted as follows:

Step Two - Mediation

The voluntary mediation of the impasse issue.

Step Three - Arbitration

Procedures are prescribed by the proposed policy manual amendment regarding an arbitration procedure for the resolution of conflicts between Head Start agencies and Policy Groups.

Board Members Signatures

Governing Board

Policy Council

Strategic Planning Activity

SWOT Analysis

LIFT Community Action Agency, Inc. Board of Directors

The following activity, referred to as a SWOT Analysis is a strategic planning technique that helps us to identify core Strengths, Weaknesses, Opportunities, and Threats. This technique is designed for use in the preliminary stages of decision-making processes and will be used as a tool for evaluation of the strategic position of the agency. The goal is to identify the internal and external factors that are favorable and unfavorable to achieving the goals and objectives of the Strategic Plan and Community Needs Assessment

The SWOT Analysis Consists of Four Parts as listed below:

- Two Internal Components which include:
 1. Strengths
 2. Weaknesses
- Two External Components which include:
 3. Opportunities
 4. Threats

The results from the SWOT analysis activity will help with the development of key objectives and strategies for inclusion in the 2026-2028 Strategic Plan. Therefore, when completing this activity, participants should be mindful of the prioritized community needs as identified in the most current community needs assessment report which are:

1. Need for Safe, Decent and Affordable Housing
2. Need for increased Transportation Services
3. Need for Safe and Reliable Youth Services Programs/Activities

STRENGTHS

Example (Staff Capacity)

Internal

WEAKNESSES

Example (Staff turnover)

**SWOT
Analysis**

OPPORTUNITIES

Example (Community Partners)

External

THREATS

Example (Funding cuts)



BSA



BOARD SELF-ASSESSMENT

LIFT Community Action Agency, Inc. | September 2025
% Participation Rate: 88% | Completion Ratio: 23/26

BoardSource

Dear Nonprofit Leader,

Congratulations on the completion of your BoardSource Board Self-Assessment. Enclosed you will find the results of your board's recent self-assessment. This report summarizes the responses to the survey, and should serve as a starting point for discussion and reflection about your board's core strengths, as well as areas that may need more attention.

The report is organized into four broad categories, which provide a framework for exploring the relationship between who serves on the board (The People), the culture it cultivates (The Culture), the way it fulfills its work responsibilities (The Work), and how all these efforts come together to position the organization to achieve your important mission (The Impact). The report also benchmarks your board's responses against other nonprofit organizations that have answered the same questions, which may be helpful as you consider your board's performance relative to your peers across the country.

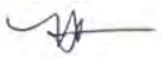
As you review the report, we encourage you to consider the following:

- What stands out? Is there anything in the report that is especially surprising, or that you'd like to understand better through conversations as a full board?
- Does the board seem to be well aligned in terms of its assessment of its performance, or are there indications that different board members are experiencing the board's leadership performance differently? If the latter, why might that be?
- To what extent is your board meeting its own expectations? In what ways is the board happy with its leadership performance, and where is it signaling a desire to improve? Do any natural priorities emerge from the ratings?
- Based on what you see in the self-assessment, what are the top one to three areas where you think the board should focus its development efforts?

These questions may help your board unlock new insights about its leadership and help you determine what goals you want to set and prioritize for your own board development and growth. We encourage you to formalize those goals or priorities as an action plan to guide your board development efforts. BoardSource has a wide range of resources and tools that can support you in those efforts, some of which are highlighted throughout this report. We also encourage you to explore www.boardsource.org to learn more about other ways we can assist your board, whether through our consulting directory, educational programming, or research and leadership on issues of great importance to boards, the social sector, and our society as a whole.

Thank you for the important work that you do, and for trusting BoardSource to be your partner. We applaud you for making this investment in your board's leadership, and look forward to being a continued resource to you as you lead your organization's important mission and work.

Sincerely,



Monika Kalra Varma
President & CEO
BoardSource
750 9th Street NW, Suite 520
Washington, DC 20001-4590
202.349.2500 / Fax 202.349.2599
www.boardsource.org
assessments@boardsource.org



Results Overview At-A-Glance

This report provides an overview of how well the board and the chief executive think the board is meeting its ten areas of governance responsibility as organized into the four broad categories. The scores for individual questions are averaged within each area of responsibility, and the scores for each responsibility are then averaged within each of the four overarching categories mentioned earlier: The People, The Culture, The Work, and The Impact. These board responsibilities and categories align with [Leading with Intent](#), BoardSource's national index of nonprofit board practices. As you read through this report, we encourage you to familiarize yourself with [Leading with Intent](#), as well as with one of BoardSource's most popular books, [Navigating the Organizational Lifecycle: A Capacity-Building Guide for Nonprofit Board Leaders](#).

Scoring

Scores are based on a 5-point scale using the following definitions:

- 0 = Poor or needs improvement
- 1 = Fair or marginal
- 2 = OK or acceptable
- 3 = Good or above average
- 4 = Excellent or superior

Important Notes: *The scale above does not apply to questions in The Impact section, questions on board experience, and other general or open-ended questions. These questions will display their own unique scoring scale and will be described in the relevant areas of the report. Respondents to the survey have the option to select NA/Don't Know to questions within the survey. Responses of NA/Don't Know are excluded from analysis within the final report and are not included in the averages provided. Responses of NA/Don't Know are also excluded from the total response count for that question..*

Benchmarking

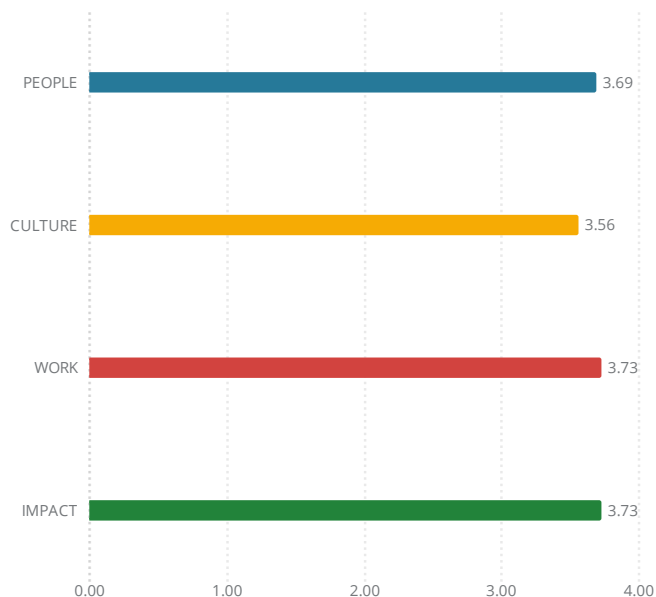
By comparing your performance as a governing body against that of your peers, you will be able to identify how your performance differs. Please use the benchmarking data as one point of reference within the context and history of your organization to help you focus on your strengths and consider potential areas for growth. It is important to note that our benchmarking offering does not necessarily reflect "best practices" that boards are recommended to follow, but rather is simply a jumping-off point, to be able to start a meaningful conversation with your board about where they stand on their work.

Our report benchmarks your data against other nonprofit organizations that have answered the same questions in BoardSource's Board Self-Assessment (BSA) surveys since 2013. It automatically updates in real time and as such is always changing. We revised our survey in 2018, therefore the audience size and makeup you are benchmarked against in this report may vary question by question. BoardSource endeavors to benchmark each question by the largest possible audience for maximum data integrity.

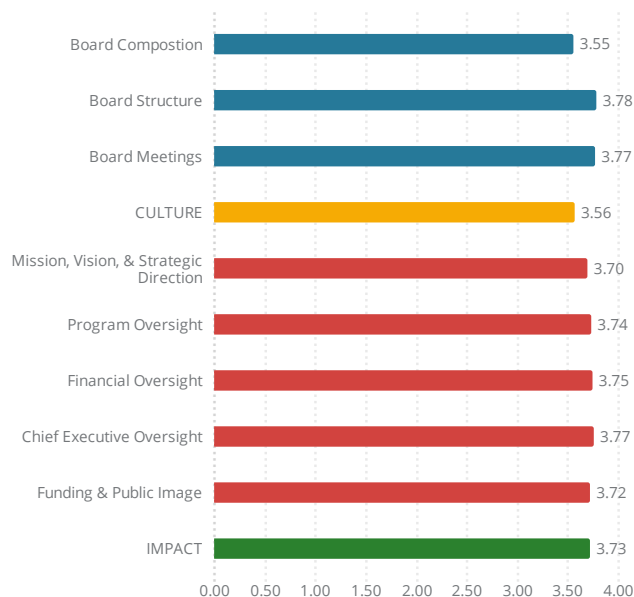
Results Overview

The graphs below show how your board has assessed its performance in the four categories (left) and ten responsibilities (right) of nonprofit boards.

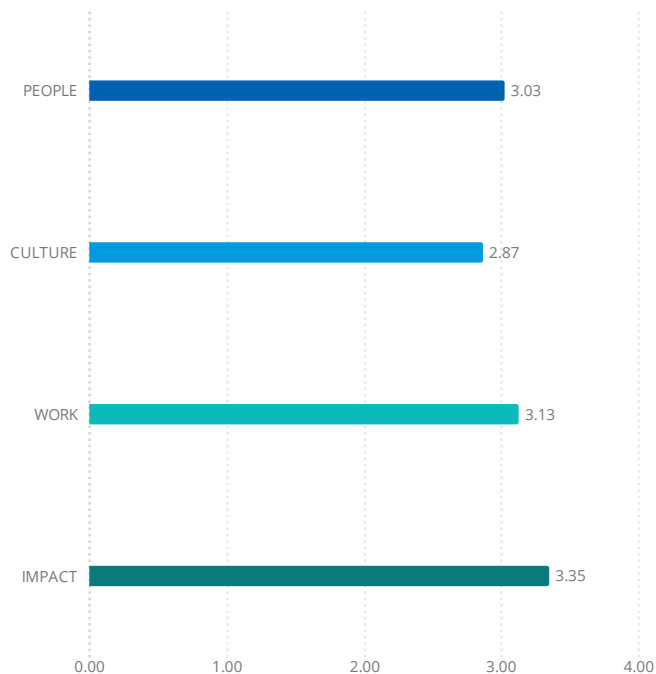
Your Board's Scores



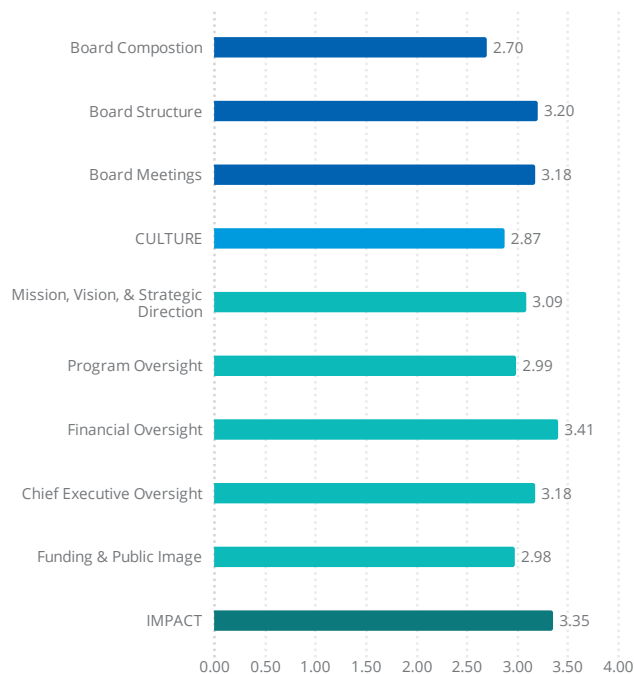
Your Board's Scores



All Boards Average Scores



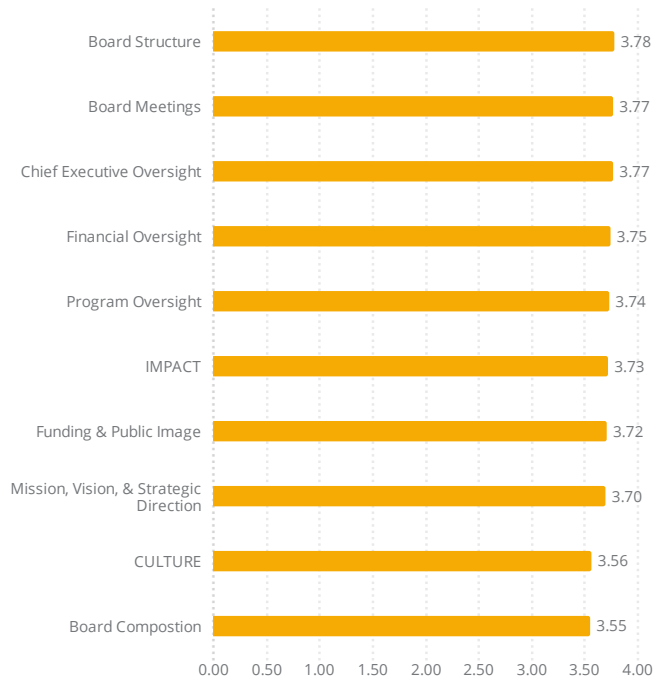
All Boards Average Scores



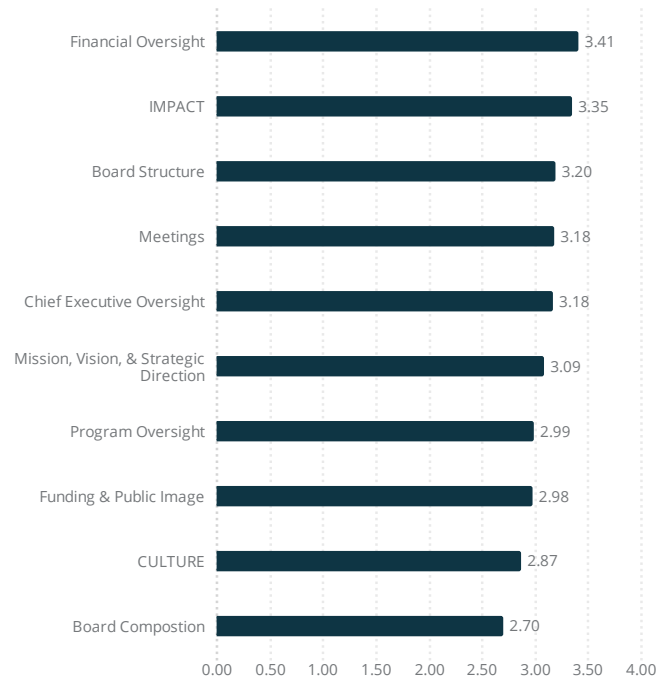
Highest to Lowest Ranked Responsibilities

The graph below shows how your board has assessed its performance — from highest to lowest — in the ten areas of responsibility. The board is performing well in those responsibilities that appear at the top of the graph. The board is performing acceptably in those responsibilities that fall in the middle of the graph, but it may want to monitor its performance. Those responsibilities that fall at the bottom of the graph may require board attention or merit further discussion.

Your Board



All Boards ▾



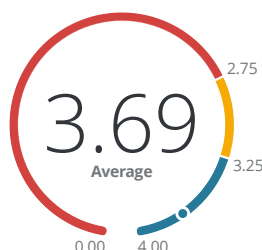
Results Breakdown by Section

The graph below shows how your board's results broken down for each section within the survey. On the left you will find your board's scores and on the right you will find charts showing the aggregate averages for all boards as a benchmark.

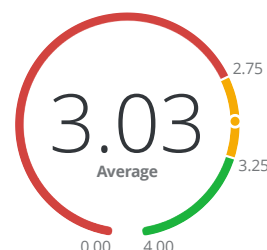
P | The People

Having the right people on the board makes higher performance — in both the board's internal and external functions — more likely. This section assesses the overall balance of who serves on the board (board composition), how people are organized (board structure), and how they deliberate together (board meetings).

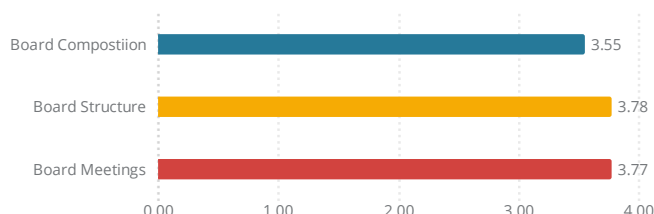
People Score - Your Board



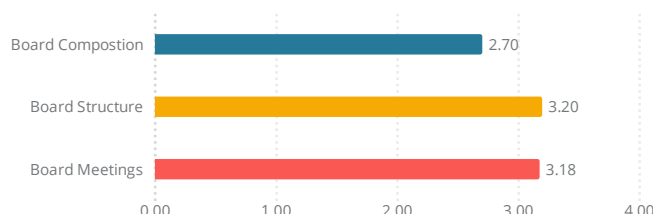
People Score - All Boards



The People Scores - Your Board



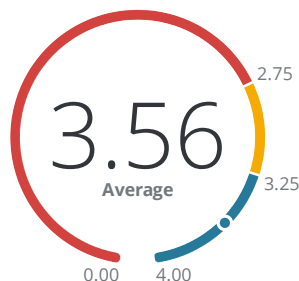
The People Scores - All Boards



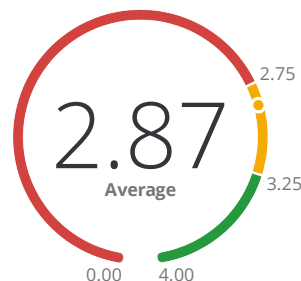
C | The Culture

How the board conducts its work — from group dynamics to its relationship with the chief executive — can help or hinder the board's ability to carry out its work. This section explores the board's performance in creating conditions for the healthy functioning of the board as a collective leadership body.

The Culture Score - Your Board



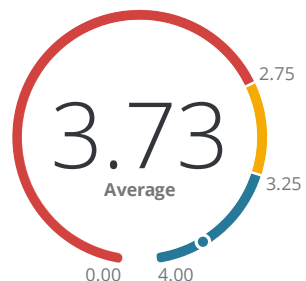
The Culture Score - All Boards



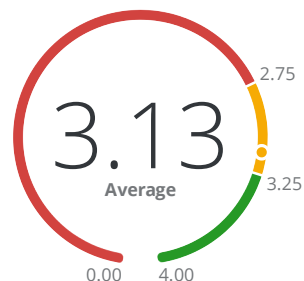
W | The Work

Boards are charged with many important responsibilities both within and outside the boardroom. This section explores board performance in five areas of responsibilities that are categorized as board work: mission, vision, and strategic direction; program oversight; financial oversight; oversight of the chief executive; and funding and public image.

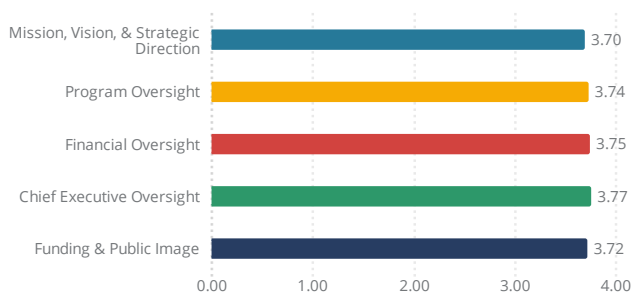
The Work Score - Your Board



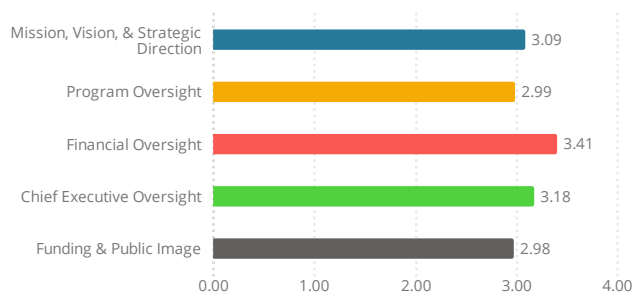
The Work Score - All Boards



The Work Scores - Your Board



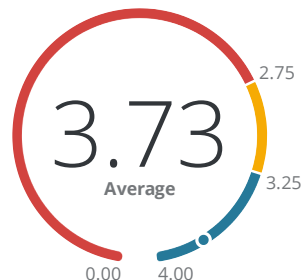
The Work Scores - All Boards



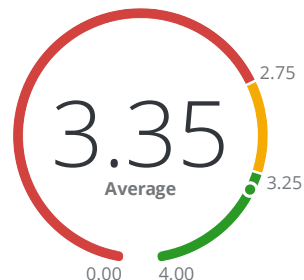
I | The Impact

This section explores the board's perception of its impact on organizational performance. The questions reflected here assess the board's connection to the organization's strategy, reputation, and overall effectiveness.

The Impact Score - Your Board



The Impact Score - All Boards



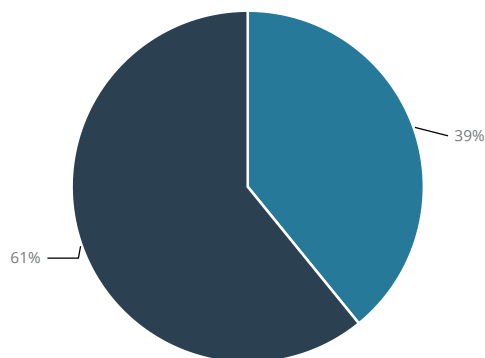
Results for Board Service Related Questions

The charts below reflect scores from questions in the general questions section (specifically Q's G.4 through G.7). On the left you will find your board's scores and on the right you will find charts showing the aggregate averages for all boards as a benchmark.

Leadership Resilience

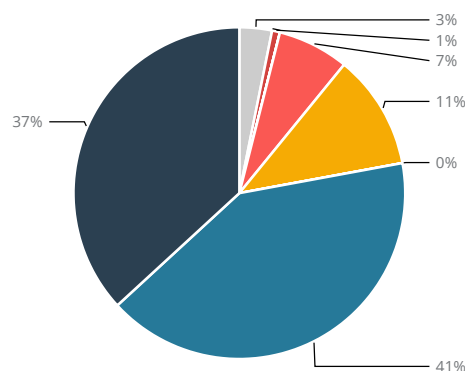
Hypothetically, if your chief executive were to suddenly leave his or her post, how confident are you that your board understands the organization well enough to make informed decisions about how the organization should be led (not just in terms of who the leader should be, but what the new leader will confront)?

Your Board



Confident Very Confident

All Boards

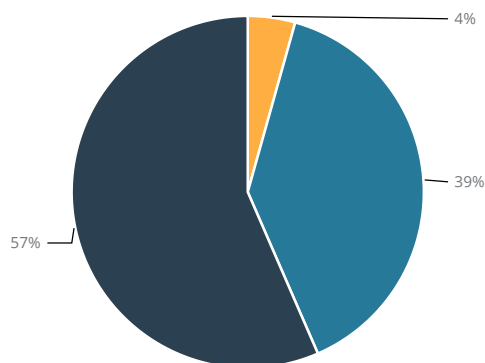


Don't Know/No Opinion No Confidence No Confidence Low Confidence Neutral Confident Confident Very Confident

Overall Effectiveness as a Leadership Body

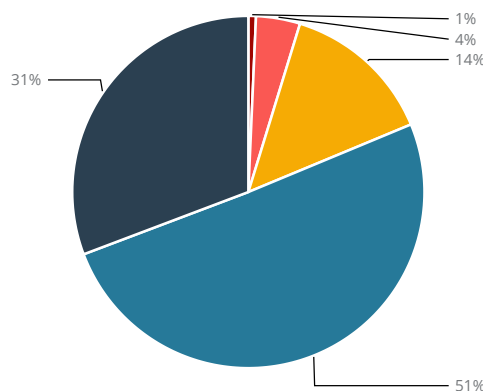
Because the percentages are based on the perceptions of your individual board members, this information can be used to spark a full board discussion on whether the members feel they are collectively meeting their responsibilities.

Your Board



Neutral Satisfied Very Satisfied

All Boards

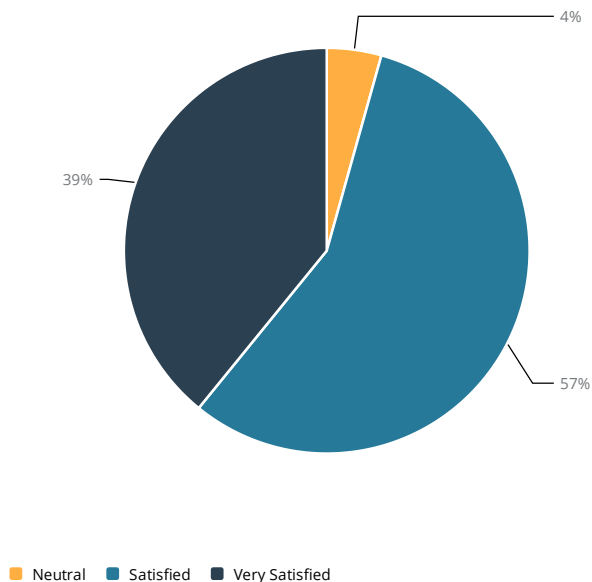


Very Dissatisfied Dissatisfied Neutral Satisfied Very Satisfied

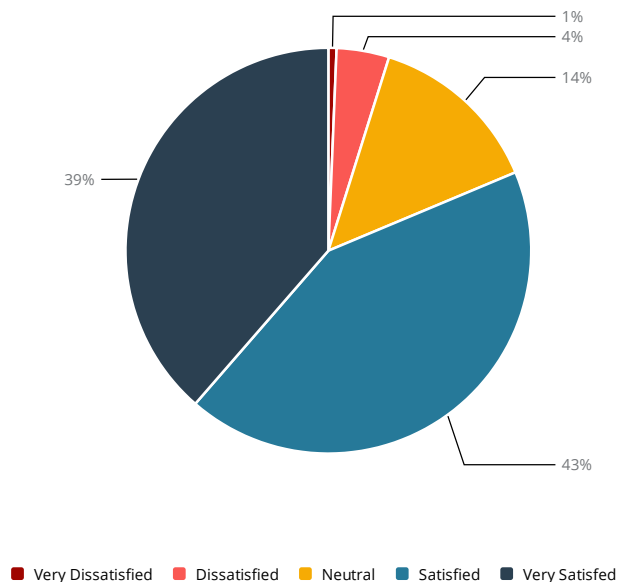
Level of Commitment and Involvement

Engaged board members make it a priority to attend and participate in all board meetings, take initiative, and jump into action when the chief executive needs expert guidance or opinion. Furthermore, engaged board members use their personal connections and affiliations to support the organization, volunteer for leadership positions on the board, and, by example, encourage others to do the same.

Your Board



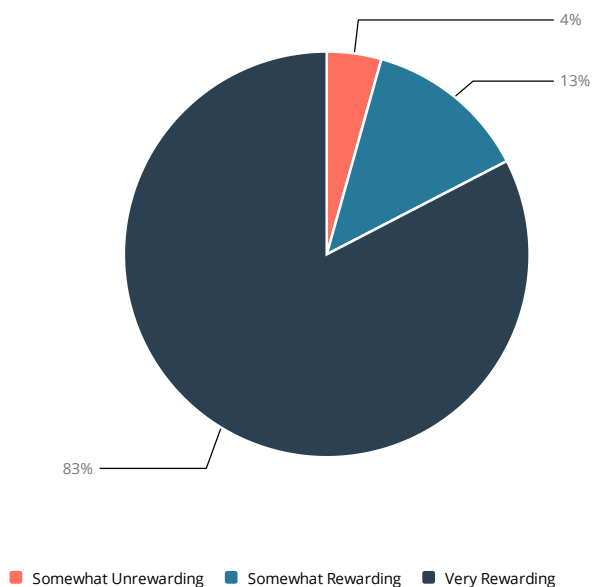
All Boards



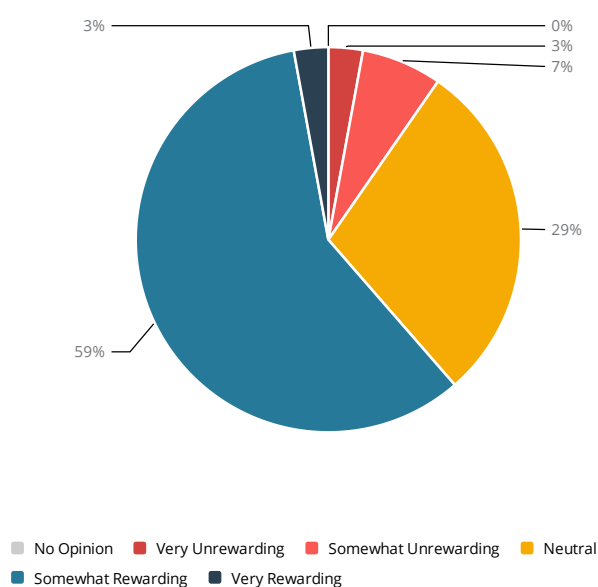
Individual Board Member Experience

Individuals serve on nonprofit boards for a variety of reasons. The percentages in this graph provide an overall sense of whether your individual board members feel that they have adequate opportunities to use their time, talent, and expertise to advance the mission of your organization.

Your Board



All Boards



General Open-Ended Responses

Comments appear exactly as they were entered in the survey.

What are the two or three most important areas the board should address to improve its performance in the next year or two?

Education, helping to redirect people lives in a positive manner, and helping to break the cycle of addiction.

Recruiting board members to adequately understand fiscal and other goals of the organization. Monitoring potential changes associated with funding opportunities/sources..

I think this Board is doing a great job of distributing money that is given and the purpose it is given for.

Members should ask more questions, and meetings could find ways to connect members more.

I think that the board is doing a great in the areas of performance

N/A

I believe are performance is fine.

I just don't see areas for improvement. We have a very strong board & leadership.

attendance and filling open positions

What organizational issues or challenges require strategic direction or guidance from the board?

Continuing to assess our impact on our communities.

The executive director has proven to be a most capable leader, and requires minimal guidance from the board.

None

I can't think of any.

no comment

N/A

We are involved with most all issue's.

What other comments or suggestions would you like to offer?

None

No

No.

no comment

N/A

No

P | The PEOPLE

Having the right people on the board makes higher performance — in both the board's internal and external functions — more likely. The most successful boards are thoughtfully composed as it relates to skillsets, leadership styles, and diversity of thought and background. This section of the report explores who serves on your board, how it is organized as a collective body, and how it structures and conducts its board meetings.

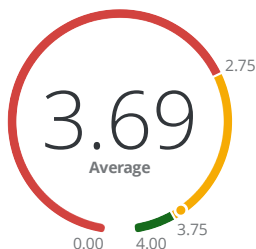
Responsibilities within this section include:

Board Composition: *People are the lifeblood of any organization, and — for a nonprofit organization — that includes the board of directors, which is responsible for its own composition and leadership. A good board is composed of individuals who contribute critically needed skills, experience, perspective, wisdom, contacts, time, and other resources to the organization. A well-conceived board-building plan helps the board to identify, recruit members and cultivate officers. New members are oriented to contribute and understand the board's responsibilities and the organization's core activities. Board member rotation ensures that the board is infused with new ideas yet remains a manageable size*

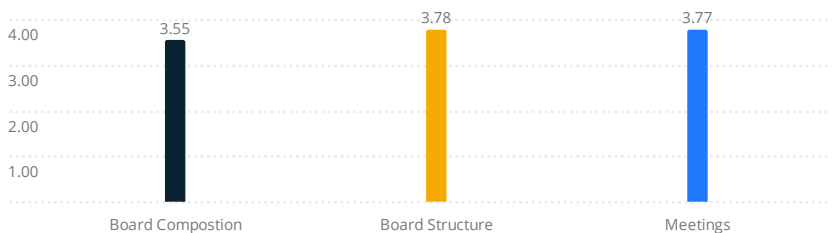
Board Structure: *The board is responsible for making sure its own practices are appropriate and up-to-date. Every board needs structure — rules, guidelines, and boundaries — and should operate in accordance with the structure provided by the organization's bylaws, policies, and procedures. It is also important for the board to periodically review and revise the bylaws, policies, and procedures as necessary. Finally, the board should be strategic about its use of committees and task forces, ensuring that each has a written charter and capable leadership.*

Board Meetings: *Meetings are when boards exercise their governance authority. Because board meeting time is a precious and limited resource, board members must make board meeting attendance a priority and structure their meetings in an efficient and effective manner. Without concerted efforts, it is easy to waste time and resources, dampen members' enthusiasm and interest, and meet without demonstrable results. Board members who prepare for and attend meeting are able to participate in educated and independent decision-making. Meetings need to be managed. A well-designed agenda helps the board chair guide the discussion and keep all members focused on the work at hand. Board members lose interest if they are not challenged and able to utilize their special skills. Listening to repetitive reports is not a constructive use of limited meeting time. Make sure that the majority of your board's meeting time is spent on future issues. By planning ahead and focusing on activities before, during, and after the meeting, you move closer to efficient meeting procedures and outcomes that meet the expectations.*

Your board's average score for The People section:



Your board's average score for responsibilities held within The People section:



Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

Responses of NA/Don't Know are excluded from analysis

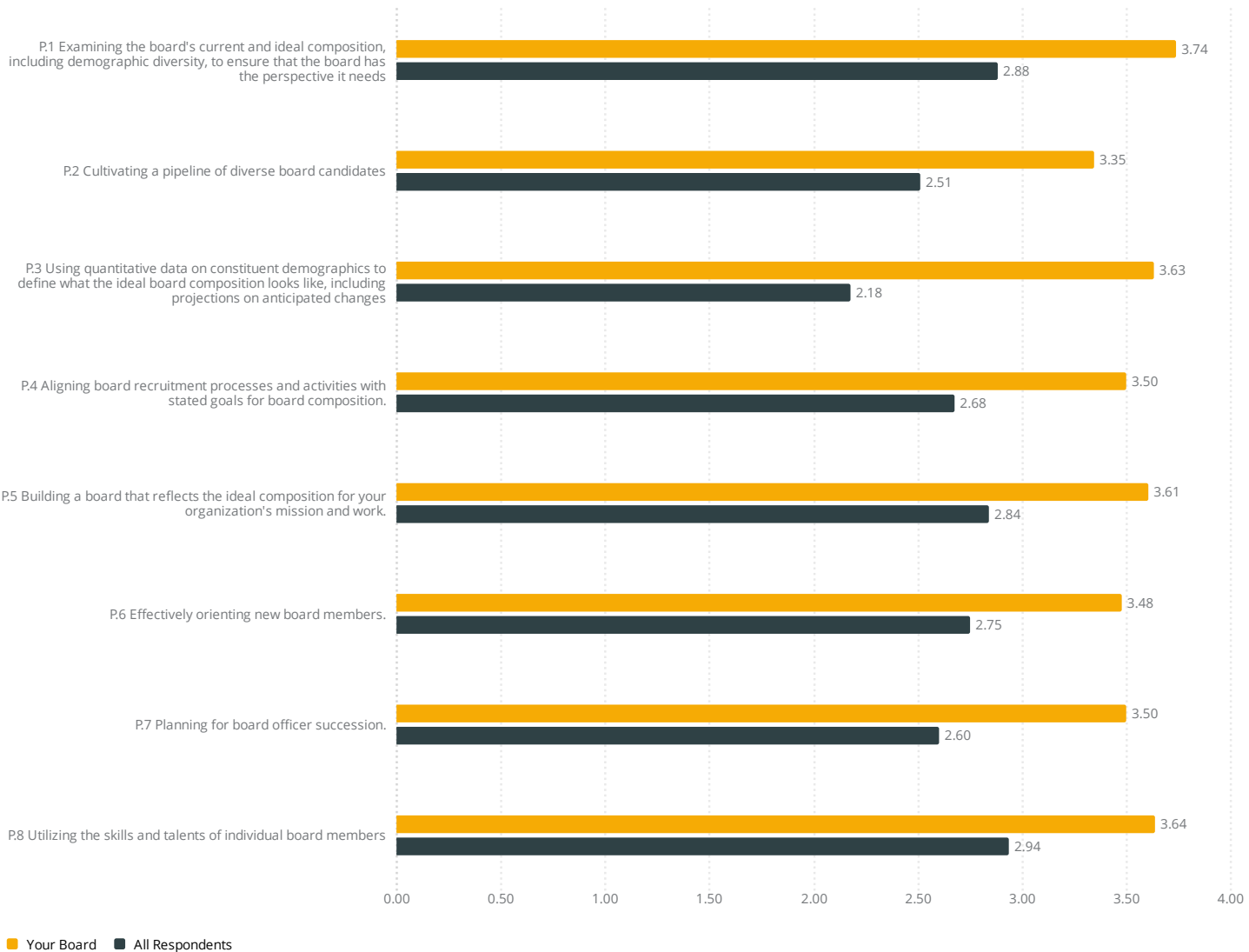
Ways to Strengthen Performance Through Action

- Approach recruitment and board building as an ongoing and strategic cycle.
- If necessary, enhance the profile of your organization to make it attractive to strong board candidates.
- Create a solid orientation program for new members no matter the extent of their previous board experience.
- If you have one, ensure your governance committee is fully engaged and involves every board member in the board-building process by recommending or cultivating potential new board members.

BoardSource Resources on Board Composition:

- Book: [The Board Building Cycle](#)
- Free Community Resource: [Taking Action on Board Diversity: Five Questions to Get You Started](#)
- Member-Only Resource: [Recruiting the Right Board Members](#)

Average Scores



Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.

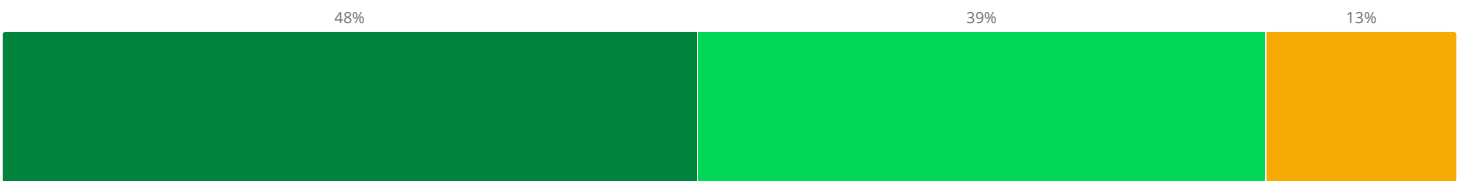
Excellent Good Ok Fair Poor NA / Don't Know

P.1 Examining the board's current and ideal composition, including demographic diversity, to ensure that the board has the perspective it needs.



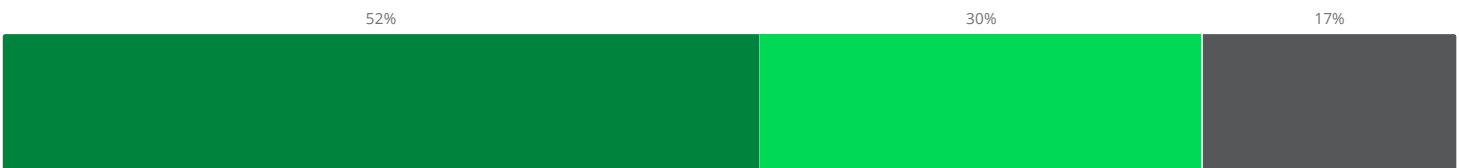
Excellent Good OK

P.2 Cultivating a pipeline of diverse board candidates.



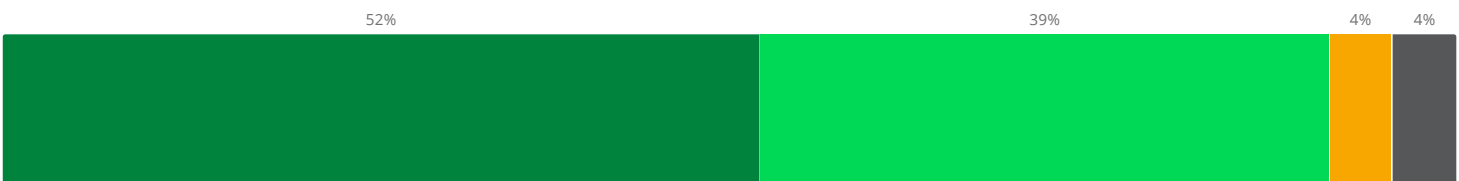
Excellent Good OK

P.3 Using quantitative data on constituent demographics to define what the ideal board composition looks like, including projections on anticipated changes.



Excellent Good NA/Don't Know

P.4 Aligning board recruitment processes and activities with stated goals for board composition.



Excellent Good OK NA/DK

P.5 Building a board that reflects the ideal composition for your organization's mission and work.



P.6 Effectively orienting new board members.



P.7 Planning for board officer succession.



P.8.Utilizing the skills and talents of individual board members.



Open-Ended Comments

To what extent does your board's specific expectations for board membership enhance - rather than impede - the board's ability to cultivate a diverse and inclusive board that brings it closer to the community the organization serves?

We recruit board members from a broadcast spectrum of candidates

I think the expectations of board involvement enhance our ability to cultivate a diverse inclusive board because we help people that our board knows. Our board is educated and consulted in the programs that we administer as well as the people that we serve.

The scheme for board membership includes attempts to recruit representatives from sectors of city, county, and sometimes state areas which possess at least a component of needs, shortfalls, and assets of the local areas which they would be representing, as well as persons who work in or have a degree of familiarity with those areas, and have a desire to improve quality of life for the geographical areas which they would represent.

I am expected to come back to the organization and share information given at the Board meeting if there is something that the community can use them I give the information to them.

They are pulled from a variety of backgrounds, which is helpful.

The board enhance their ability by expanding their expectations to value the community and families they serve as an organization. They bring together different mindset which inform higher quality decision to help shape and cultivate the community as a whole.

N/A

I don't know that it does. Most families served are in a lower income bracket and most members of the board seem to have comfortable or more than a comfortable living.

Different areas of expertise

All demographics of the area we live in are considered in choosing board members.

Would you like to provide any comments or context to your ratings for this section?

I think we actually go above and beyond in our board recruitment efforts.

Seems it has become more difficult in this day and time to recruit members who are willing to expend the time and effort required to address goals of the organization.

No I think this Board has been very informative with what's going on.

No

no comment

N/A

No

No

No

How can the board improve its performance in this area?

It's an ongoing process. You get a board just right.

Maybe rely more on current board members.

They are doing a great job.

I don't know.

They are doing great job!

N/A

Unknown

No improvement

I do not know

Board Structure, Duties, & Expectations | Section Detail

Size Matters: *The primary guide for determining board size is the board's function, which may change over time depending on organizational lifecycle, board responsibilities, committee structure, legal mandates, need for diversity, and maintaining a manageable group. Variables such as these make it impossible to recommend a standard size for all boards; however it is difficult to imagine that a board with fewer than five members is able to incorporate all the desired qualities and capacity of an effective board, or that an exceptionally large board is able to engage every member in a constructive manner. Regardless of size, all board members must be engaged, as all are equally accountable for the organization.*

Committees: *Committees can be a practical way to structure and manage the board's work. Standing committee structure can be lean, strategic, and complemented by the use of task forces. Only ongoing board activities really need a standing committee. Otherwise, time-limited task forces are efficient and utilize board members' time, interest, and expertise in a meaningful manner. Committees and task forces are more effective when their charter and scope of work are clearly defined by the board.*

Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

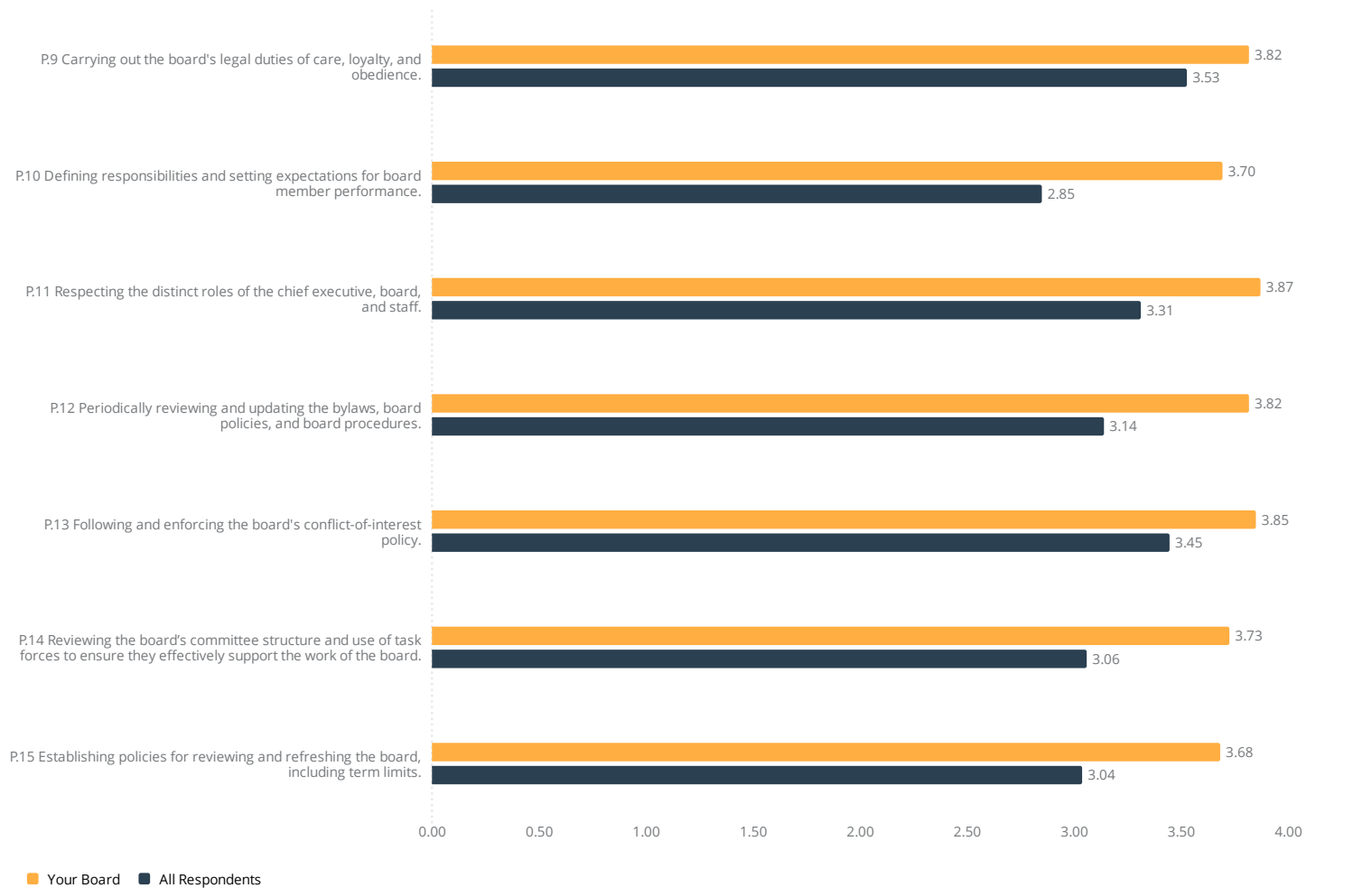
Responses of NA/Don't Know are excluded from analysis

Ways to Strengthen Performance Through Action

- Periodically assess your board's workload, committee structure, lifecycle requirements, need for diversity, and legal mandates to ensure that your board is managed well.
- View your bylaws and policies as evolving documents needing regular review; ensure timely amendments when necessary.
- Consider using time-limited task forces in lieu of standing committees for those activities that are not ongoing.

BoardSource Resources on Board Structure, Duties, & Expectations:

- Free Community Resource: [Board Committee Membership: Who Should Serve on Which Committee?](#)
- Members-Only Resource: [Board Development Plan](#)
- Free Community Resource: [Bylaws Dos and Don'ts](#)



Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.

■ Excellent
 ■ Good
 ■ Ok
 ■ Fair
 ■ Poor
 ■ NA / Don't Know

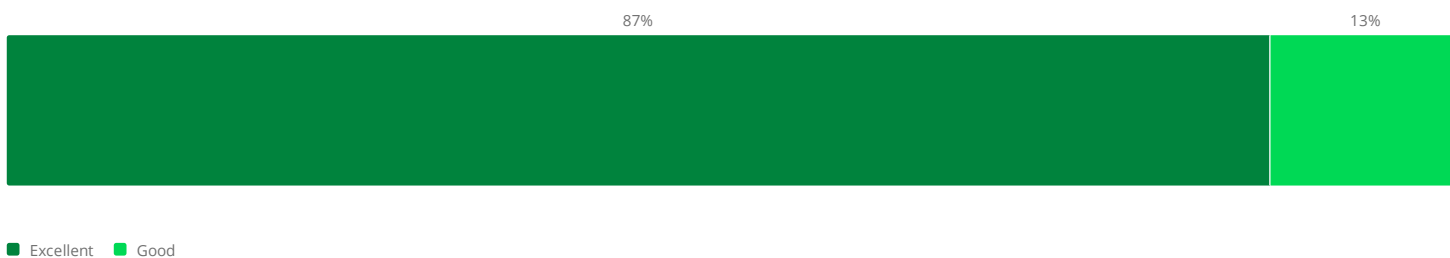
P.9 Carrying out the board's legal duties of care, loyalty, and obedience.



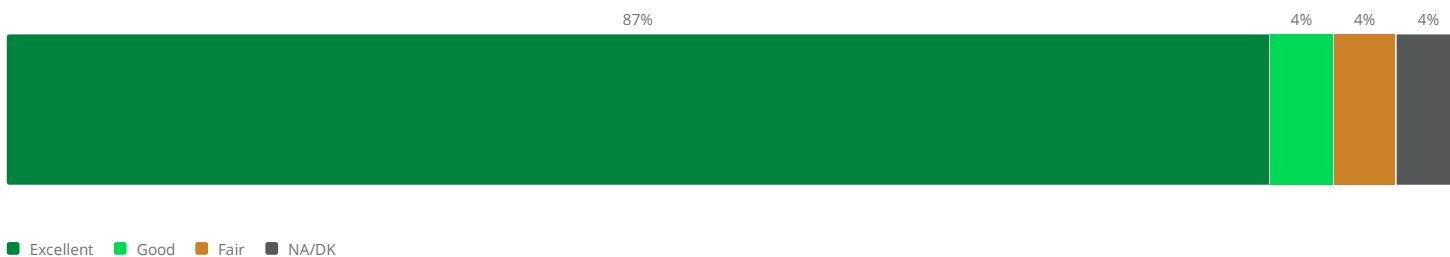
P.10 Defining responsibilities and setting expectations for board member performance.



P.11 Respecting the distinct roles of the chief executive, board, and staff.



P.12 Periodically reviewing and updating the bylaws, board policies, and board procedures.



P.13 Following and enforcing the board's conflict-of-interest policy.



P.14 Reviewing the board's committee structure and use of task forces to ensure they effectively support the work of the board.





■ Excellent ■ Good ■ NA/DK

Open-Ended Comments

Would you like to provide any comments or context to your ratings for this section?

I think we do an excellent job utilizing the strengths of our board members with the amount of time that they have to give to our agency.

No

No.

Not at this time

The performance is always good!

N/A

No

No

How can the board improve its performance in this area?

Everything is great

I don't know.

No comment

N/A

Unknown

I do not know

Board Meetings | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

Responses of NA/Don't Know are excluded from analysis

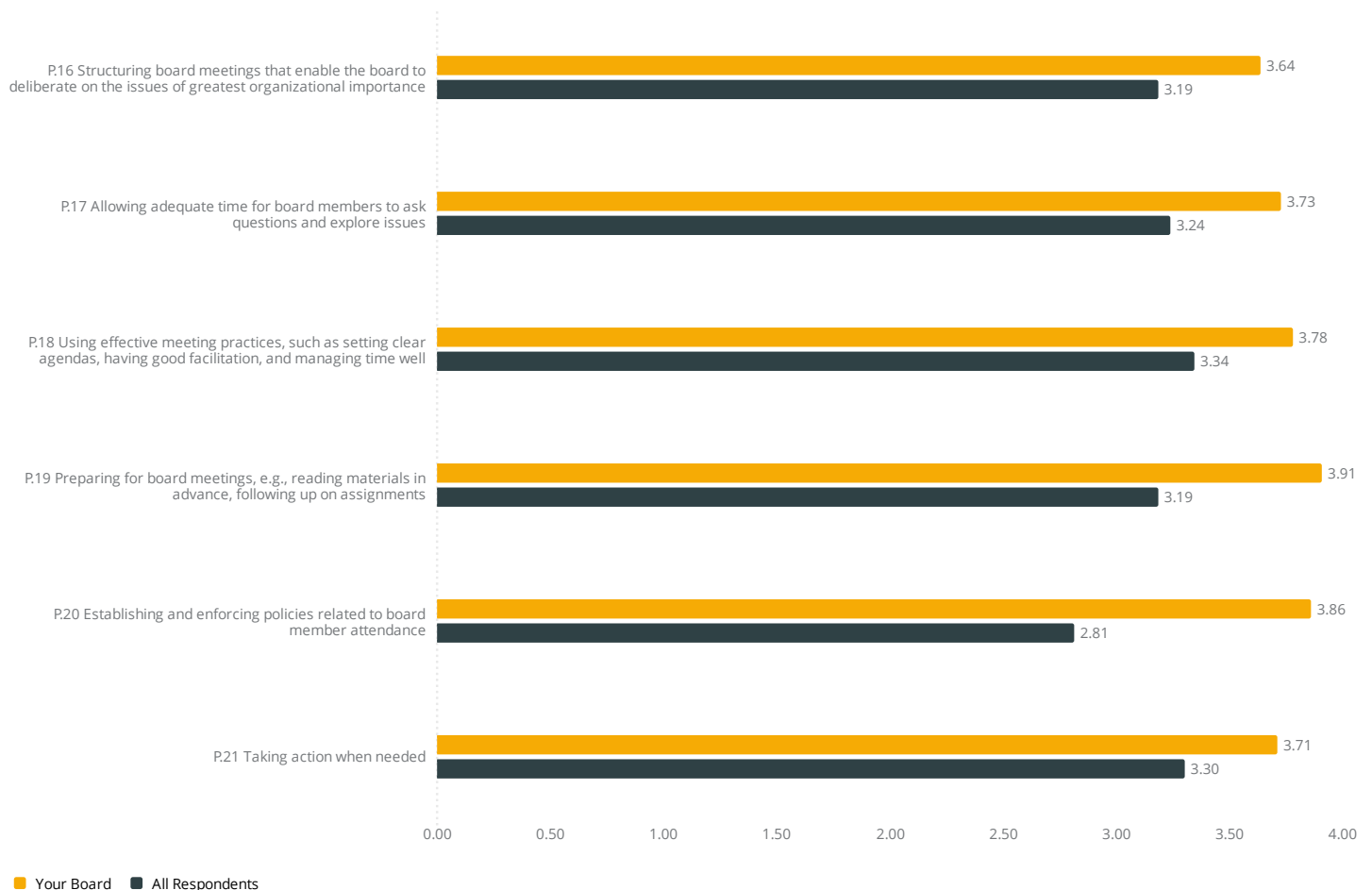
Ways to Strengthen Performance Through Action

- Shape your board meetings in such a way that they invite board engagement.
- Approach meetings as a vital resource in service to the organization's sustainability and plan accordingly.
- Make sure the agenda ties in with the strategic plan. Focus on your big issues.
- Board members: Read the materials sent to you in advance of the meeting. Come to the meeting prepared. Be ready to participate.

BoardSource Resources on Board Meetings:

- Free Community Resource: [Board Meeting Preparation:10 Tips for Chief Executives and Board Chairs](#)
- Members-Only Resource: [Facilitating an Engaged Board](#)

Average Score



Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.

Excellent Good Ok Fair Poor NA / Don't Know

P.16 Structuring board meetings that enable the board to deliberate on the issues of greatest organizational importance.



Excellent Good Fair NA/DK

P.17 Allowing adequate time for board members to ask questions and explore issues.



Excellent Good Fair NA/DK

P.18 Using effective meeting practices, such as setting clear agendas, having good facilitation, and managing time well.



Excellent Good

P.19 Preparing for board meetings, e.g., reading materials in advance, following up on assignments.



Excellent Good NA/DK



■ Excellent ■ Good ■ NA/DK

P.21 Taking action when needed.



■ Excellent ■ Good ■ Fair ■ NA/DK

Open-Ended Comments

Would you like to provide any comments or context to your ratings for this section?

I think that we do an excellent job as far as board member input and involvement. You can be as involved as you want.

No

I do feel like the board could be better at taking the time to ask questions.

no comment

N/A

This board is efficient and conducts business in a timely manner. All members are given time and attention to any questions presented. All information is available ahead of the meeting and explained thoroughly when questioned.

How can the board improve its performance in this area?

Not sure, maybe asking some of our board to step up and participate more.

The meetings are organize well.

I'm not sure, but we should try to engage the Board to press for more questions.

no comment

I don't see any area for improvement.

C | The CULTURE

How the board conducts its work — from group dynamics to its relationship with the chief executive — can help or hinder the board's ability to carry out its work. Likewise, board culture and dynamics are also affected by who serves on the board and the nature of the work that the board undertakes. How board members communicate with each other, work as a team, and make decisions all define the culture of the board. The combination of formal and informal rules, traditions, and agreements that develop over time inform how a board interacts, deliberates, and ultimately performs as a governing body.

The Culture | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

Responses of NA/Don't Know are excluded from analysis

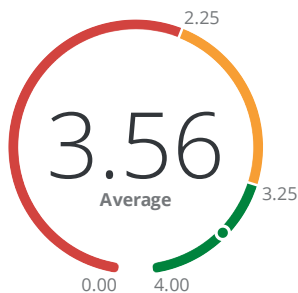
Ways to Strengthen Performance Through Action

- Consider board culture as a key factor in board performance.
- Envision, as a team, what an ideal board culture would look like.
- Reflect on what investments have been made to date toward a healthy board culture.

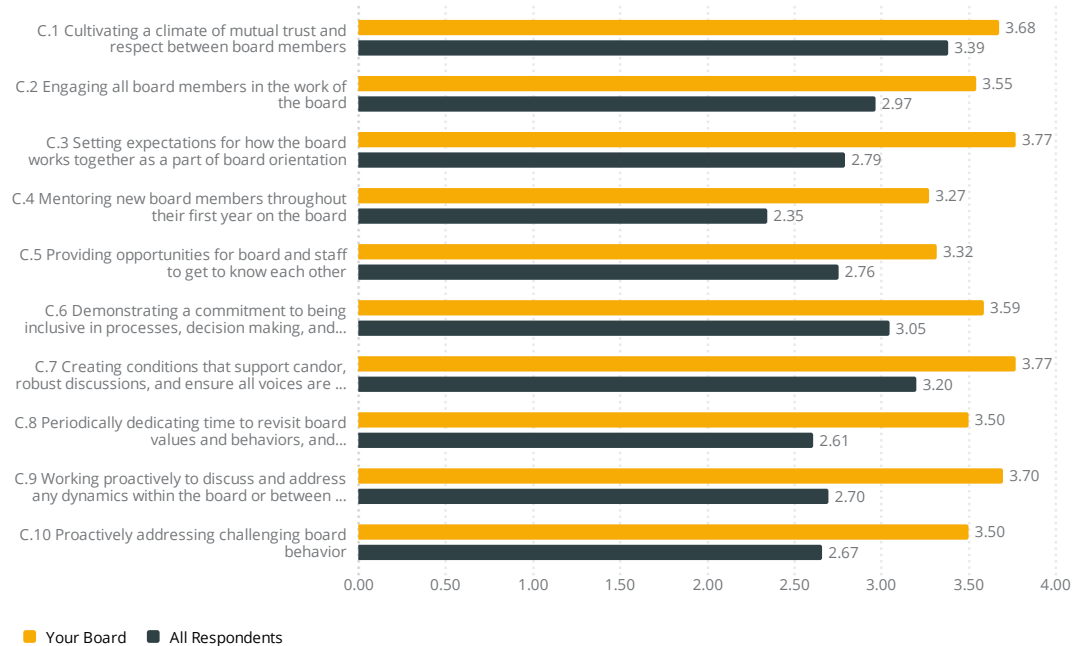
BoardSource Resources on Board Culture:

- Free Community Resource: [Catalytic Questions](#)
- Members-Only Resource: [18 Questions About Board Culture](#)
- Members-Only Resource: [Eight Ways to Increase Your Board's Ability to Work as a Team](#)

Your board's average score for
The Culture section:



Average Scores for Your Board vs. All Boards for each question within The Culture section:



Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.

Excellent Good Ok Fair Poor NA / Don't Know

C.1 Cultivating a climate of mutual trust and respect between board members.



Excellent Good NA/DK

C.2 Engaging all board members in the work of the board.



Excellent Good OK NA/DK

C.3 Setting expectations for how the board works together as a part of board orientation.



Excellent Good NA/DK

C.4 Mentoring new board members throughout their first year on the board.



Excellent Good OK Fair NA/Don't Know

C.5 Providing opportunities for board and staff to get to know each other.



C.6 Demonstrating a commitment to being inclusive in processes, decision making, and officer/committee chair selection.



C.7 Creating conditions that support candor, robust discussions, and ensure all voices are heard.



C.8 Periodically dedicating time to revisit board values and behaviors, and how they impact the work of the board.



C.9 Working proactively to discuss and address any dynamics within the board or between board members that may be negatively impacting the board's ability to share power equally.





■ Excellent ■ Good ■ Poor ■ NA/DK

Open-Ended Comments

Would you like to provide any comments or context to your ratings for this section?

We have an expectation that our board members be involved and cohesive in terms of supporting our ED, staff, and program initiatives, and I also feel that our board wholeheartedly supports the mission.

No

No.

no comment

N/A

I can only speak positively about this board. Every aspect of the current board and proceedings are positive and encouraging to members.

How can the board improve its performance in this area?

There isn't improvement needed.

It might be nice to have a meeting or two with some extra time to re-acclimate Board Members to one another and their backgrounds.

no comment

N/A

I don't see any need of improvement.

W | The WORK

Boards are charged with important responsibilities. Some of these responsibilities are more fundamental, such as understanding the organization's mission and providing financial oversight. Other responsibilities are more strategic and adaptive — such as providing strategic direction and partnership with the chief executive — and still others address external leadership and ambassadorship. This section explores how well the board understands its responsibilities in each of these areas.

Responsibilities within this section include:

Mission, Vision, and Strategic Direction: One of the board's primary roles is to set strategic direction. A good statement of mission and purposes serves to guide organizational planning and setting priorities among competing demands for scarce resources. To further carry out its role in setting direction, the board is actively involved in strategic planning and thinking. To do this effectively, the board must understand the organization's clients and stakeholders, as well as its internal and external operating environments. This enables the board to respond appropriately as opportunities and challenges arise. The board should focus its efforts primarily on long-term, strategic issues, rather than short-term operational and administrative matters. Effective and strategic boards take responsibility for identifying the issues that must be addressed to serve the organization's mission, vision, and values in the years ahead. Board members should utilize their unique talents and experience to identify these issues and to inform the organization's understanding of them.

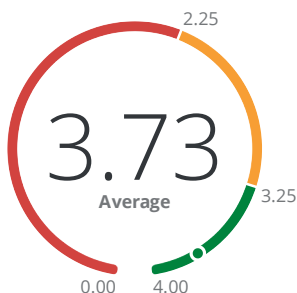
Program Oversight: The board is responsible for program oversight and should work in collaboration with staff to understand the scope of the organization's programs and services, establish appropriate goals for quality and results, and monitor performance data. To strengthen the board's program oversight, board members should be provided with opportunities to connect with and deepen their understanding of the organization's mission and work.

Financial Oversight: Boards are responsible for ensuring the organization has adequate resources, protecting its assets, and maintaining its legal and ethical integrity. This includes approving the annual budget and then monitoring performance against the budget throughout the year. The board also oversees the annual audit to verify that the organization is accurately reporting the sources and uses of its funds. To safeguard the organization's future, the board establishes appropriate investment and risk management policies, as needed.

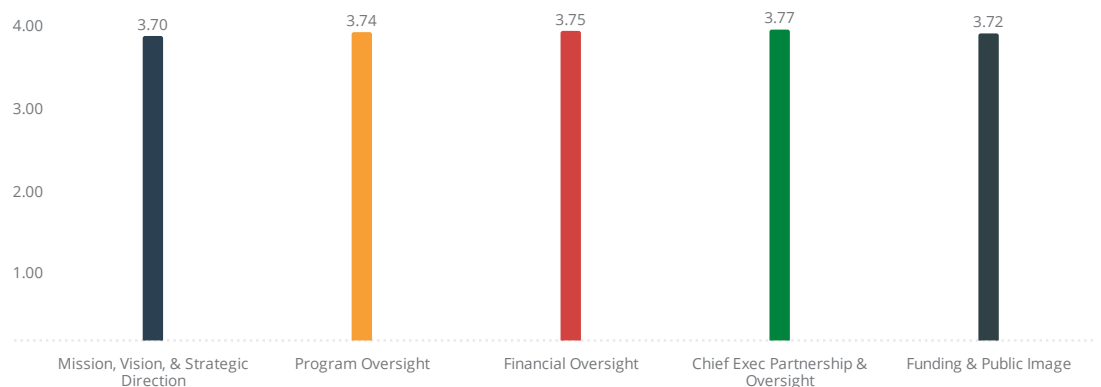
Chief Executive Partnership & Oversight: The primary board-staff relationship is between the board and the chief executive, and the quality of this relationship is of the utmost importance to the success of the organization. To be effective, the board and chief executive need a close working relationship based on mutual trust and an appreciation of their respective roles in leading the organization. As part of its responsibility for supervising the chief executive, the board ensures that a current job description outlines the duties of the role, then evaluates the chief executive annually and determines appropriate executive compensation.

Funding & Public Image: Every nonprofit requires adequate financial resources and a positive public image to accomplish its mission. To ensure the organization's financial sustainability, the board should make sure the organization has an appropriate mix of income and support the organization's fundraising strategy by participating in fundraising. Members can do this in a number of ways, including making personal contributions, connecting staff to potential donors, and soliciting friends and colleagues. The board is also responsible for building, protecting, and promoting the organization's public standing. To meet this responsibility, board members serve as ambassadors to the community and as an essential element of an organization's outreach efforts.

Your board's average score for
The Work section:



Your board's average score for responsibilities held within The Work section:



Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

Responses of NA/Don't Know are excluded from analysis

The following are key elements to consider when setting direction are your organization's mission, vision, and values:

- A mission statement defines your organization's fundamental purpose. A clear mission statement is inspirational yet realistic, emotional as well as informative, concise and complete. It is positive and focuses on achievable accomplishments.
- The vision statement is about long-term goals and the direction in which the organization is heading. It defines the organization's dream. Because a vision statement is created through a group process in which all boards members share their ideals for the organization, it has a team-building effect.
- Values are the principles that help mold the organization's character, tone, and working style. By articulating these principles, the board establishes guideposts that help chart direction for years ahead.

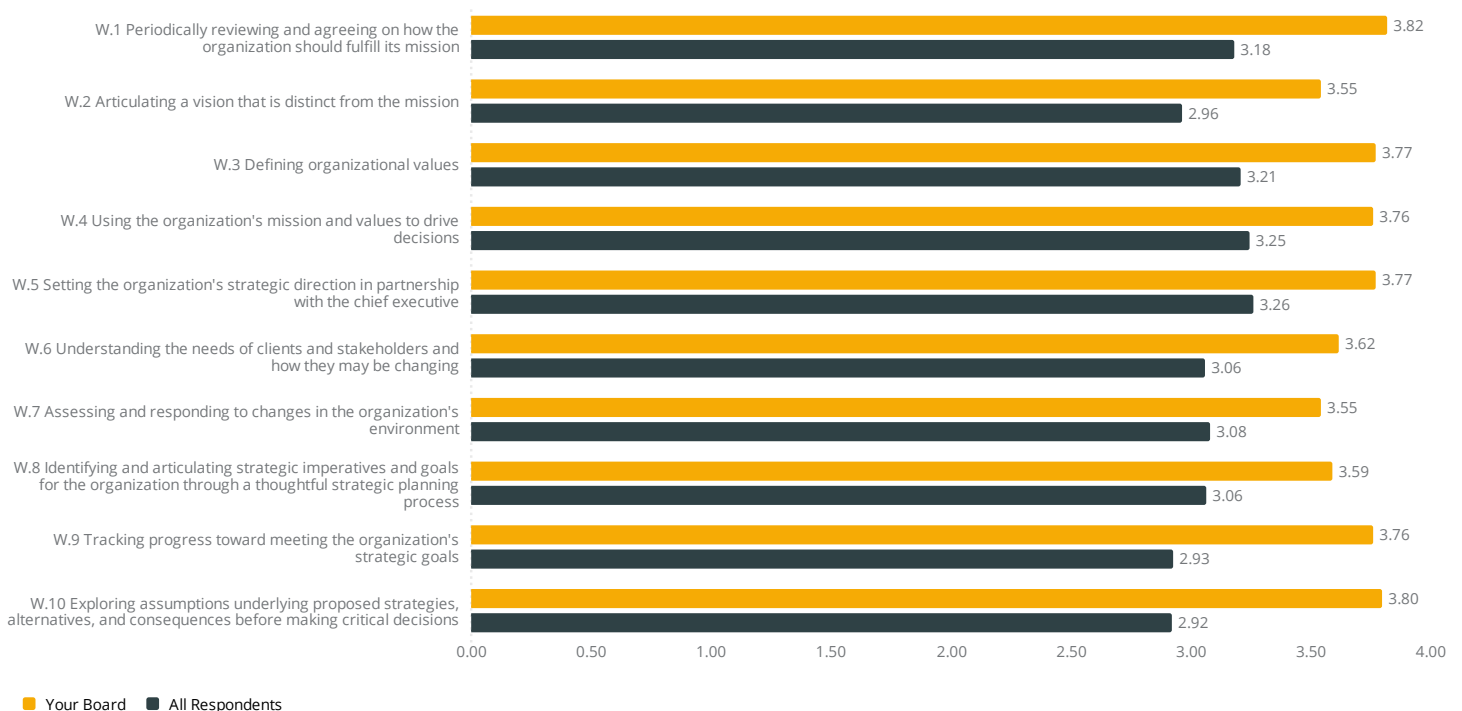
Ways to Strengthen Performance Through Action

- Occasionally revisit the organization's mission and vision statements to ensure that the organization remains relevant.
- Work together with the chief executive to provide guidance and input in developing the strategic planning process.
- Elevate strategic thinking by incorporating it into every board meeting rather than relegating it to annual retreats or strategic planning processes.

BoardSource Resources on Mission, Vision, & Strategic Direction:

- Book: [The Nonprofit Board's Role in Mission, Planning, and Evaluation](#)
- Free Community Resource: [Tips for Developing a Mission Statement](#)
- Free Community Resource: [Mission Statement vs. Vision Statement](#)
- Guide: [Shaping the Future of Your Organization: A Strategic Planning Guide for Nonprofit Leaders](#)
- Free Community Resource: [Nonprofit Strategy By the Numbers: Evolution and Progress](#)
- Free Community Resource: [Charting a New Path Forward: Insights & Reflections from BoardSource's Strategic Planning Efforts](#)

Average Score



Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.

Excellent Good Ok Fair Poor NA / Don't Know

W.1 Periodically reviewing and agreeing on how the organization should fulfill its mission.



Excellent Good NA/DK

W.2 Articulating a vision that is distinct from the mission.



Excellent Good OK NA/DK

W.3 Defining organizational values.



Excellent Good NA/DK

W.4 Using the organization's mission and values to drive decisions.



Excellent Good NA/DK

W.5 Setting the organization's strategic direction in partnership with the chief executive.



W.6 Understanding the needs of clients and stakeholders and how they may be changing.



W.7 Assessing and responding to changes in the organization's environment.



W.8 Identifying and articulating strategic imperatives and goals for the organization through a thoughtful strategic planning process.



W.9 Tracking progress toward meeting the organization's strategic goals.





■ Excellent
 ■ Good
 ■ NA/DK

Open-Ended Comments

How can the board improve its performance in this area?

I don't know.

no comment

N/A

N/A

Would you like to provide any comments or context to your ratings for this section?

Although time consuming, this aspect of CAP leadership is something we take seriously and try to improve and enhance every time we go over this material.

No.

no comment

N/A

All of these areas are touched on at most meetings, if not every meeting. We have an excellent chief officer that is very transparent of every aspect of this organization & keeps the board informed.

Program Oversight | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

Responses of NA/Don't Know are excluded from analysis

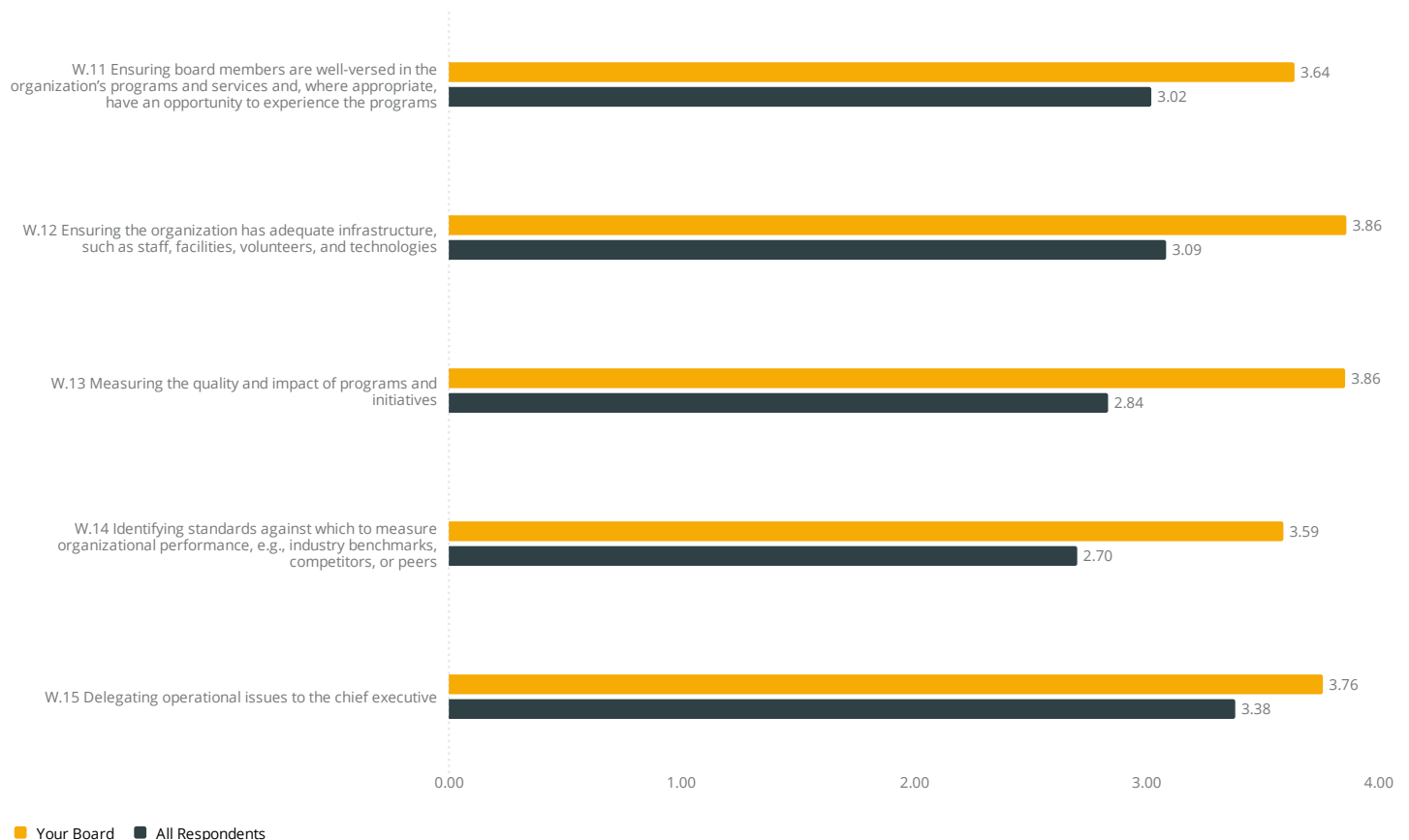
Ways to Strengthen Performance Through Action

- Embrace board education around programs and services as an ongoing activity.
- Devote time to discussions of what kinds of program data are board — rather than management — related.
- Determine how to provide the board with the information it needs to make data-driven and informed decisions while avoiding report overload at board meetings.

BoardSource Resources on Program Oversight:

- Book: [The Nonprofit Dashboard: Using Metrics to Drive Mission Success](#)
- Free Community Resource: [Strengthen Your Board's Leadership by Increasing Its Understanding of Programs](#)
- Members-Only Resource: [Identifying and Managing Risk](#)
- Members-Only Resource: [Nonprofit Programmatic Oversight Tool](#)

Average Score



Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.

Excellent Good Ok Fair Poor NA / Don't Know

W.11 Ensuring board members are well-versed in the organization's programs and services and, where appropriate, have an opportunity to experience the programs.



Excellent Good NA/DK

W.12 Ensuring the organization has adequate infrastructure, such as staff, facilities, volunteers, and technologies.



Excellent Good NA/DK

W.13 Measuring the quality and impact of programs and initiatives.



Excellent Good NA/DK

W.14 Identifying standards against which to measure organizational performance, e.g., industry benchmarks, competitors, or peers.



Excellent Good NA/DK



■ Excellent ■ Good ■ NA/DK

Open-Ended Comments

Would you like to provide any comments or context to your ratings for this section?

Our board meetings are 2 to 3 hours long, so there is ample opportunity to participate and learn.

No.

Well organized

N/A

This board is well informed from each department & program by way of reports from each department, sharing goals, issues & accomplishments.

How can the board improve its performance in this area?

I have nothing to add.

no comment

N/A

I don't see an area needing improvement

Financial Oversight | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

Responses of NA/Don't Know are excluded from analysis

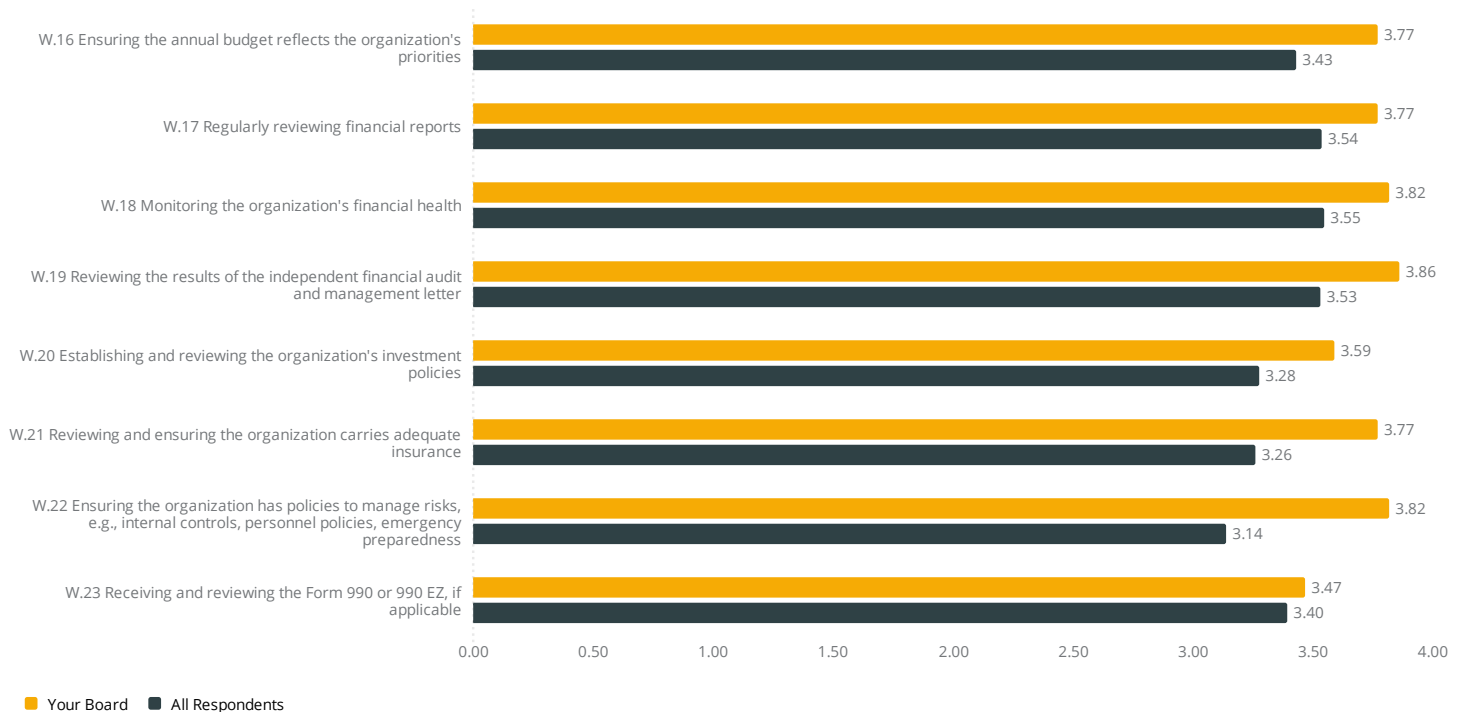
Ways to Strengthen Performance Through Action

- Assist all board members in understanding nonprofit financial statements through onboarding activities and ongoing education.
- Cultivate a climate of partnership, transparency, and rigorous ethics among board finance committee members and finance staff.
- Encourage a culture of inquiry on the full board, recognizing that finance committee recommendations are simply that and liability for decisions rests with the full board.

BoardSource Resources on Financial Oversight:

- Free Community Resource: [Red Flags, Yellow Flags: Are Your Financial Statements Trying to Tell You Something?](#)
- Book: [Financial Responsibilities of Nonprofit Boards](#)
- Guide: [Welcome to Your Financial Statements: A Primer for Nonprofit Board Members](#)

Average Score



Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.

Excellent Good Ok Fair Poor NA / Don't Know

W.16 Ensuring the annual budget reflects the organization's priorities.



Excellent Good NA/DK

W.17 Regularly reviewing financial reports.



Excellent Good Fair NA/DK

W.18 Monitoring the organization's financial health.



Excellent Good NA/Don't Know

W.19 Reviewing the results of the independent financial audit and management letter.



Excellent Good NA/DK

W.20 Establishing and reviewing the organization's investment policies.



■ Excellent ■ Good ■ Fair ■ NA/DK

W.21 Reviewing and ensuring the organization carries adequate insurance.



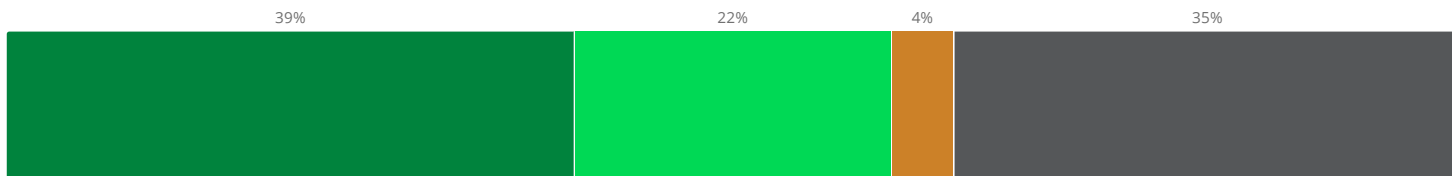
■ Excellent ■ Good ■ NA/DK

W.22 Ensuring the organization has policies to manage risks, e.g., internal controls, personnel policies, emergency preparedness.



■ Excellent ■ Good ■ NA/DK

W.23 Receiving and reviewing the Form 990 or 990 EZ, if applicable.



■ Excellent ■ Good ■ Fair ■ NA/DK

Open-Ended Comments

Would you like to provide any comments or context to your ratings for this section?

We have a finance committee, financials every month, an audit, an open door policy from our ED that allows up to stay on top of financials.

No.

excellent with managing the budget

N/A

Again, each area of finance is reported on & discussed in a timely manner & each area explained in manners easily understood.

How can the board improve its performance in this area?

I don't know.

no comment

N/A

No improvements necessary

Chief Executive Partnership & Oversight | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

Responses of NA/Don't Know are excluded from analysis

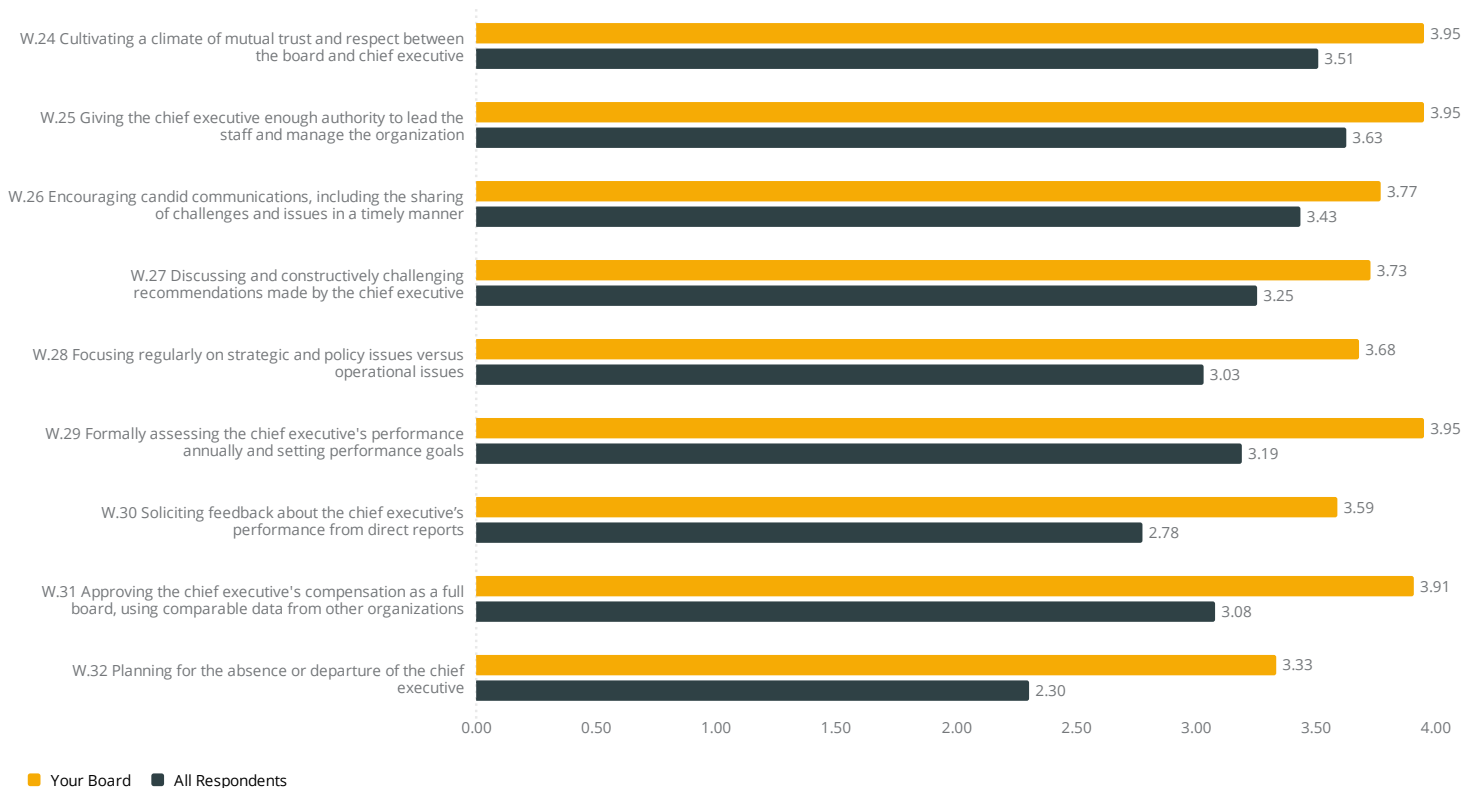
Ways to Strengthen Performance Through Action

- Provide the chief executive with a clear job description and mutually agreed-upon annual expectations.
- Recognize that effective board-chief executive partnerships, like all relationships, should be flexible in nature. Practices, communication, and assumptions may occasionally need to be recalibrated.
- Ensure full board participation in the chief executive evaluation (feedback, final approval) even if a committee leads the process.

BoardSource Resources on Chief Executive Partnership & Oversight:

- Members-Only Resource: [Setting Goals for Your CEO](#)
- Book: [Govern More, Manage Less](#)
- Free Community Resource: [Board Chair and Chief Executive Partnership](#)

Average Score

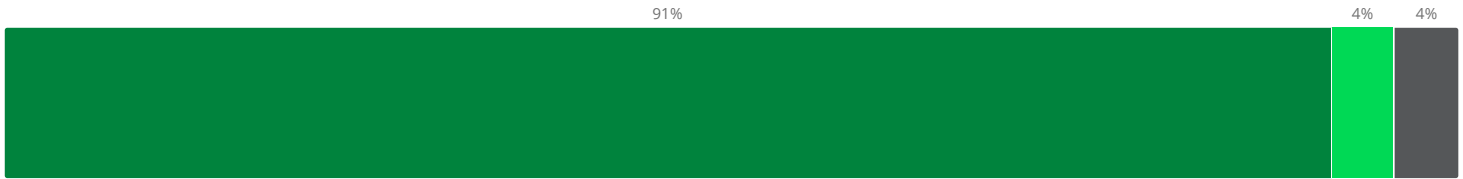


Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.

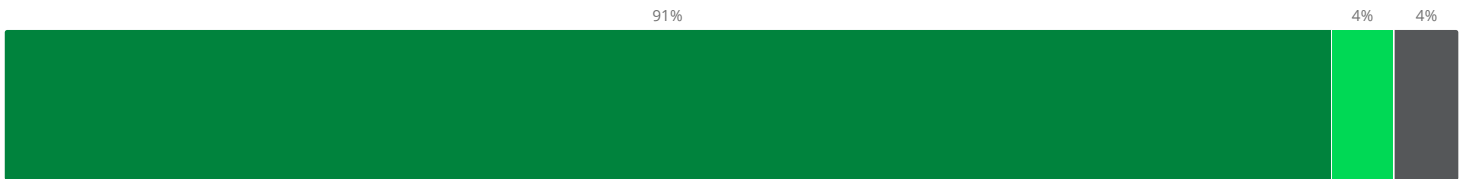
Excellent Good Ok Fair Poor NA / Don't Know

W.24 Cultivating a climate of mutual trust and respect between the board and chief executive.



Excellent Good NA/DK

W.25 Giving the chief executive enough authority to lead the staff and manage the organization.



Excellent Good NA/DK

W.26 Encouraging candid communications, including the sharing of challenges and issues in a timely manner.



Excellent Good NA/DK

W.27 Discussing and constructively challenging recommendations made by the chief executive.



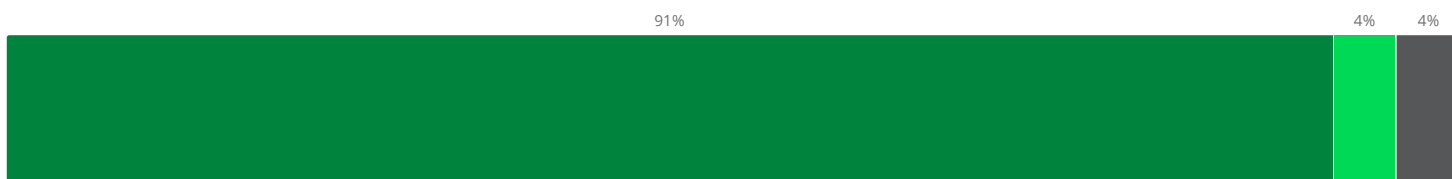
Excellent Good NA/DK

W.28 Focusing regularly on strategic and policy issues versus operational issues.



■ Excellent ■ Good ■ OK ■ Fair ■ NA/DK

W.29 Formally assessing the chief executive's performance annually and setting performance goals.



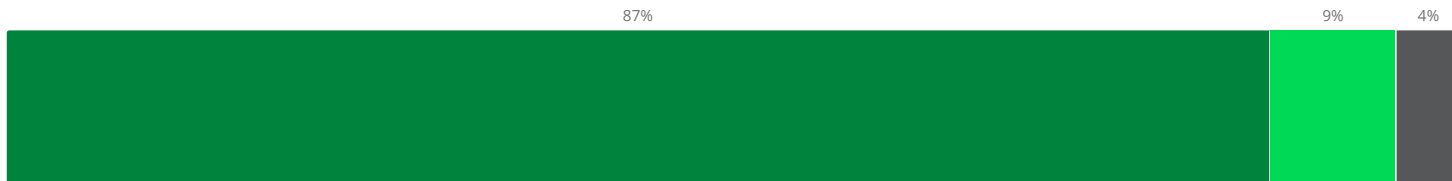
■ Excellent ■ Good ■ NA/DK

W.30 Soliciting feedback about the chief executive's performance from direct reports.



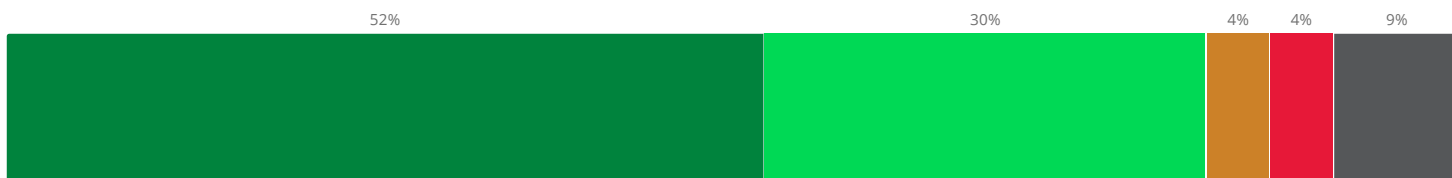
■ Excellent ■ Good ■ Fair ■ Poor ■ NA/DK

W.31 Approving the chief executive's compensation as a full board, using comparable data from other organizations.



■ Excellent ■ Good ■ NA/DK

W.32 Planning for the absence or departure of the chief executive.



■ Excellent ■ Good ■ Fair ■ Poor ■ NA/DK

Open-Ended Comments

Would you like to provide any comments or context to your ratings for this section?

Our current ED does a tremendous job in communicating with the board.

No.

no comment

N/A

Our board is fully informed of our Chief executives management of this entity. There is not any aspect of this organization that our chief executive does not know every detail of & can inform the board of on the spot.

How can the board improve its performance in this area?

I have nothing to add here.

no comment

N/A

No improvement needed.

Funding & Public Image | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Poor or needs improvement | 1 = Fair or marginal | 2 = OK or acceptable | 3 = Good or above average | 4 = Excellent or superior

Responses of NA/Don't Know are excluded from analysis

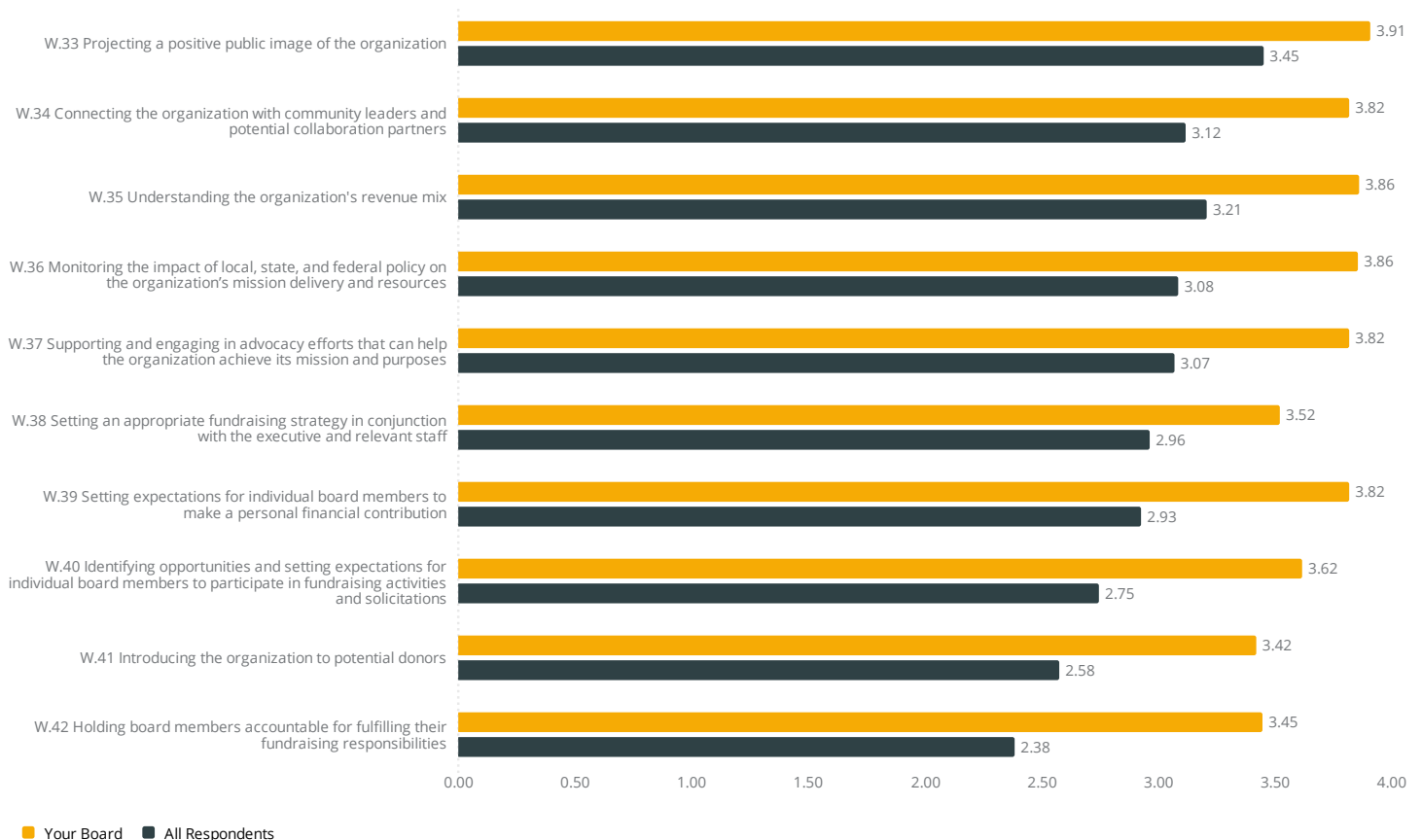
Ways to Strengthen Performance Through Action

- Consider the partnership climate between the board, executive, and staff as it relates to fundraising, specifically shared understanding of resource development strategies and fund development plans.
- Embrace opportunities for board members to participate in fundraising activities that are customized/individualized, aligned with organizational strategy, and clearly communicated.
- Evaluate the policy environment within which your organization operates.

BoardSource Resources on Funding & Public Image:

- Book: [Fundraising Responsibilities of Nonprofit Boards](#)
- Free community resource: [Measuring Fundraising Effectiveness](#)
- Free community resource: [Stand for Your Mission](#)

Average Score

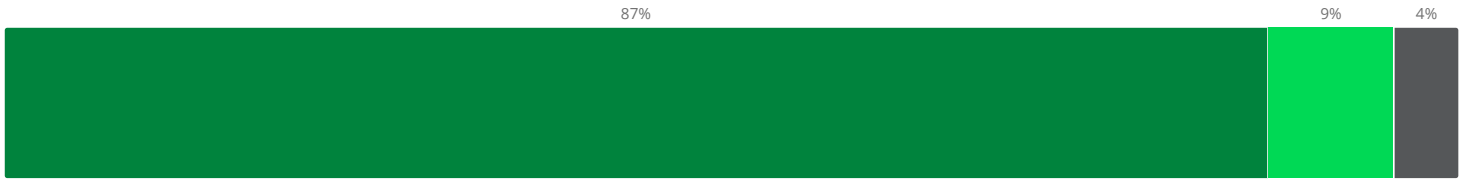


Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.

Excellent Good Ok Fair Poor NA / Don't Know

W.33 Projecting a positive public image of the organization.



Excellent Good NA/DK

W.34 Connecting the organization with community leaders and potential collaboration partners.



Excellent Good NA/DK

W.35 Understanding the organization's revenue mix, e.g., government funding, charitable gifts, fees for service, and how it aligns with the business model.



Excellent Good NA/DK

W.36 Monitoring the impact of local, state, and federal policy on the organization's mission delivery and resources.

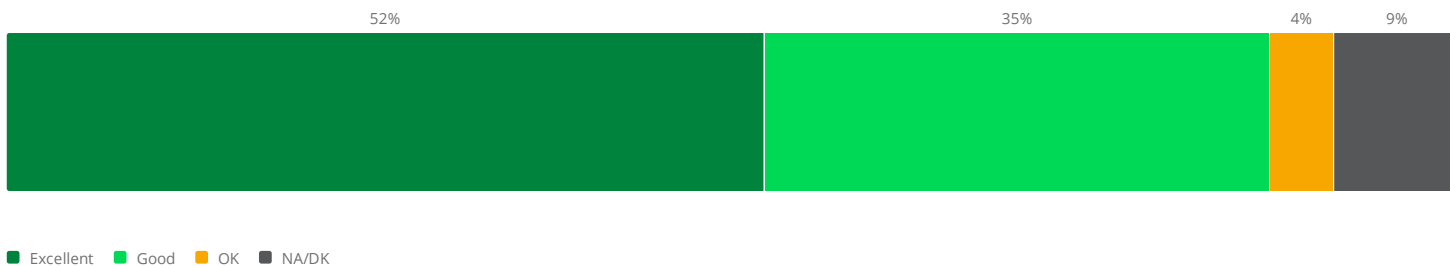


Excellent Good NA/DK

W.37 Supporting and engaging in advocacy efforts that can help the organization achieve its mission and purposes.



W.38 Setting an appropriate fundraising strategy in conjunction with the executive and relevant staff.



W.39 Setting expectations for individual board members to make a personal financial contribution.



W.40 Identifying opportunities and setting expectations for individual board members to participate in fundraising activities and solicitations.



W.41 Introducing the organization to potential donors.





Excellent Good Poor NA/DK

Open-Ended Comments

To what extent is the board enhancing your organization's reputation and credibility with the community your organization serves? Donors and funders to your organization? Public policy decision makers that are in a position to positively (or negatively) impact your organization's work? The general public?

We market ourselves very well, but not so much to local donors and funders.

I represent the Washington Community Center. We haven't figured out yet how to qualify for funding. There is information that helps within the community.

It could be improved, like anything could be, but I think things are adequate now.

no comment

N/A

Partnering with organization in some areas.

This board is strong & solid on all areas .

Would you like to provide any comments or context to your ratings for this section?

No

No

no comment

N/A

This board is strong & solid in this area.

How can the board improve its performance in this area?

The board needs to be challenged to be more involved in fundraising.

They are doing a great job.

I have nothing to add.

no comment

N/A

None needed

I | The IMPACT

This section explores the board's perception of its impact on organizational performance. The questions reflected here assess the board's connection to the organization's strategy, reputation, and overall effectiveness and the extent to whether this is a positive or negative impact. If the board has a negative or neutral impact on organizational performance, there's an opportunity to make improvements and better utilize the board's time and leadership as a vital resource. Leading with Intent data suggest two characteristics that both chief executives and board chairs report as having the strongest connection to board impact: understanding the board's role and responsibilities and the board's ability to work as a collaborative team.

The Impact | Section Detail

Scores are based on a 5-point scale using the following definitions:

0 = Very Negative | 1 = Somewhat Negative | 2 = Neutral | 3 = Somewhat Positive | 4 = Very Positive

Responses of Don't Know/No Opinion are excluded from analysis

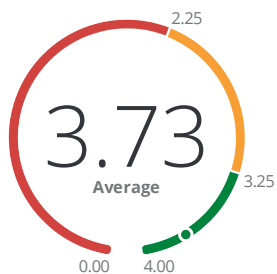
Ways to Strengthen Performance Through Action

- Discuss the board's results for this section, including what information or practices would better help the board in making a positive impact.
- Evaluate the impact results in light of your board's results in other sections of this report, looking for any potential relationships in high or low scoring areas.

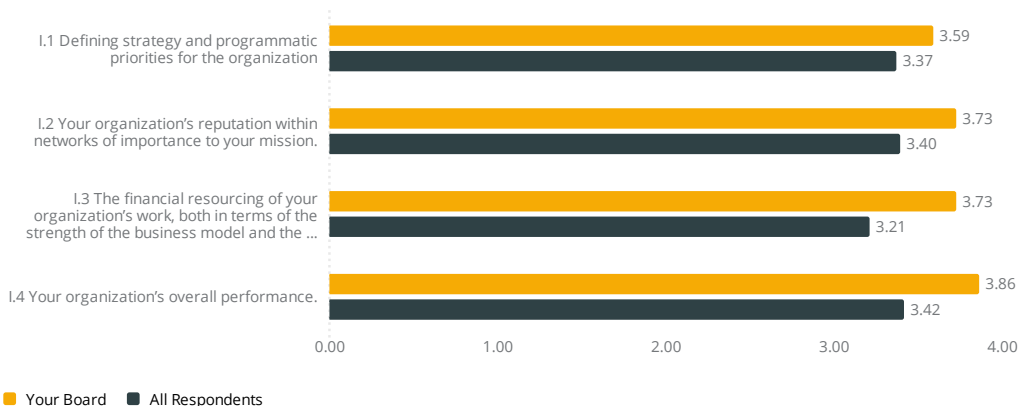
BoardSource Resources on Board Impact:

- Book: [The Source: 12 Principles of Governance That Power Exceptional Boards](#)
- Free Community Resource: [What Makes a Good Board Member?](#)
- Members-Only Resource: [Eight Ways to Increase Your Board's Ability to Work as a Team](#)

Your board's average score for
The Impact section:

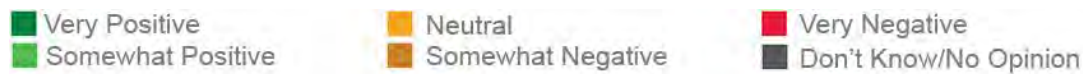


Average Scores



Scoring Breakdown

Breakdown bars below will show the % a scoring option is chosen. Use the legend below or beneath each breakdown chart to identify the individual scoring options.



I.1 Defining strategy and programmatic priorities for the organization. (We asked that you assess both the quality/substance of the board's input and the clarity with which the board has defined these strategies and priorities.)



Very Positive Somewhat Positive Neutral DK/NO

I.2 Your organization's reputation within networks of importance to your mission. (We asked that you focus specifically on the extent to which the board enhances the organization's reputation [by communicating the organization's values and priorities], rather than filtering it through the lens of fundraising or anything else.)



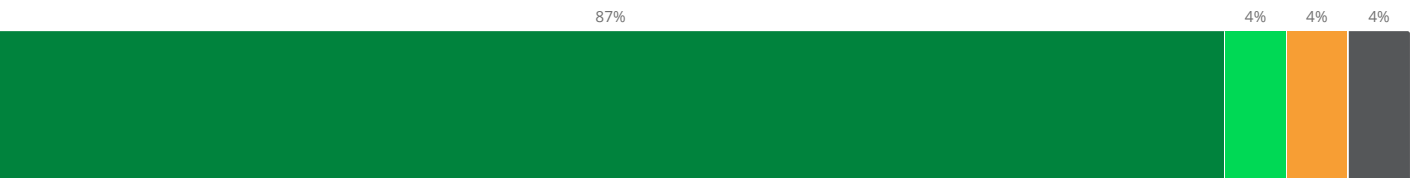
Very Positive Somewhat Positive DK/NO

I.3 The financial resourcing of your organization's work, both in terms of the strength of the business model and the securing of revenues.



Very Positive Somewhat Positive DK/NO

I.4 Your organization's overall performance.



Very Positive Somewhat Positive Neutral DK/NO

Open-Ended Comments

Would you like to provide any comments or context to your ratings for this section?

The Washington Community Center serves the community, we feed, rent the building out for different functions, have banquets and meetings.

No.

no comment

N/A

The board is strong in all areas. This board & organization has a positive relationship with the community.

How can the board improve its performance in this area?

I'm not sure.

no comment

N/A

Na

Checklist of Practices

Certain policies and practices characterize an effective nonprofit board. Some of these practices are required by law; many others have become widely accepted as good practice.

Section Detail

*The information in this section represent responses to questions answered **only by your organization's chief executive**. In the results for each of the four practice areas you can see the total percent of practices your board has in place for that specific area of responsibility, the individual answers your chief executive gave to each related yes/no question, and a chart that can be used as a benchmark to your board's choice of implemented practices.*

Keep the following definitions in mind:

Yes = our board currently implements this policy or practice

No = our board does not currently implement this policy or practice

Don't Know = I do not know or have enough information answer definitively

Not Applicable = this policy or practice does not apply to our board's work

The four main practices below:

Organizational Practices cover documents and procedures related to mission, strategy, and accountability.

Oversight Practices include policies and procedures related to financial oversight and compliance.

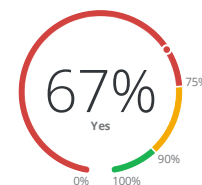
Board Practices address issues related to board orientation, term limits, retreats, and committees.

Chief Executive Supervision Practices cover the support and supervision of the highest paid staff person.

Organizational Practices

% of organizational practices your board has in place:

Does your board have the following practices in place?



CLP.1 Written mission statement?

Yes

CLP.2 Written vision statement?

Yes

Yes

Yes

CLP.5 Has the organization completed the board leadership practices section of its GuideStar profile?

CLP.6 Has the organization completed the board and staff demographics section of its GuideStar profile?

No

No

Benchmark: % of boards that have each policy in place: 7

CLP. Org Practices	YES
CLP.01 Written mission statement	99%
CLP.02 Written vision statement	84%
CLP.03 Written code of ethics	71%
CLP.04 Clearly defined and documented approach to organizational strategy	67%
CLP.05 Has the organization completed the board leadership practices section of its GuideStar profile	29%
CLP.06 Has the organization completed the board and staff demographics section of its GuideStar profile	29%

Oversight Practices

% of oversight practices your board has in place

Does your board have the following practices in place?



CLP.7 Did the full board formally approve the organization's annual budget?

CLP.8 Does the full board receive financial reports at least quarterly?

Yes

Yes

CLP.9 Within the past year, has the organization obtained a formal independent audit?

Yes

CLP.10 Did the board, or a committee of the board, meet with the auditors without staff present?

Yes

CLP.11 Did all board members receive a copy of the organization's IRS Form 990?

Yes

CLP.12 Does the organization post the most current financial documents, such as annual reports and audited financial statements, on its website?

Yes

CLP.13 Does the organization have a whistleblower policy that incorporates a reporting avenue outside of the executive in case of suspected illegal activities?

Yes

CLP.14 Does the organization have a document retention and destruction policy?

Yes

CLP.15 Does the organization carry adequate directors' and officers' liability insurance?

Yes

CLP.16 Does the organization have a written conflict-of-interest policy?

Yes

CLP.17 Have all current board members and senior staff signed a conflict-of-interest and annual disclosure statement?

Yes

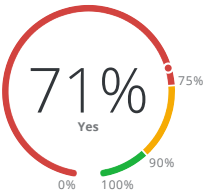
Benchmark: % of boards that have each policy in place: 7

CLP. Oversight Practices	YES
CLP.07 Did the full board formally approve the organization's annual budget?	97%
CLP.08 Does the full board receive financial reports at least quarterly?	94%
CLP.09 Within the past year, has the organization obtained a formal independent audit?	91%
CLP.10 Did the board, or a committee of the board, meet with the auditors without staff present? (Select NA if there is no independent audit.)	59%
CLP.11 Did all board members receive a copy of the organization's IRS Form 990?	76%
CLP.12 Does the organization post the most current financial documents, such as annual reports and audited financial statements, on its website?	55%
CLP.13 Does the organization have a whistleblower policy that incorporates a reporting avenue outside of the executive in case of suspected illegal activities?	81%
CLP.14 Does the organization have a document retention and destruction policy?	75%
CLP.15 Does the organization carry adequate directors' and officers' liability insurance?	94%
CLP.16 Does the organization have a written conflict-of-interest policy?	96%
CLP.17 Have all current board members and senior staff signed a conflict-of-interest and annual disclosure statement?	75%

Board Practices

% of oversight practices your board has in place:

Does your board have the following practices in place?



CLP.18 Is a structured, formal orientation held for new board members?

CLP.19 Is the length of board member terms defined?

Yes

Yes

CLP.20 Is there a maximum number of consecutive years a board member can serve?

CLP.21 Does the board have an annual retreat?

Yes

No

Yes

Yes

CLP.24 As the chief executive, are you a member of the board – either voting or non-voting?

CLP.24B (If Yes to CLP.24) As the chief executive, are you excluded from participating in board votes?

No

Benchmark: % of boards that have each policy in place: 7

CLP. Board Practices	YES
CLP.18 Is a structured, formal orientation held for new board members?	71%
CLP.19 Is the length of board member terms defined?	93%
CLP.20 Is there a maximum number of consecutive years a board member can serve?	75%
CLP.21 Does the board have an annual retreat?	46%
CLP.22 Do board committees have written charters or job descriptions?	75%
CLP.23 Is there a written policy specifying the executive committee's roles and powers? (Select NA if the board does not have an executive committee.)	66%
CLP.24 As the chief executive, are you a member of the board – either voting or non-voting?	62%
CLP.24B As the chief executive, are you excluded from participating in board votes?	74%

Chief Executive Supervision Practices

% of CEO supervision practices your board has in place:

Does your board have the following practices in place?



CLP.25 Does the chief executive have a written job description?

Yes

CLP.26 Is the chief executive's performance evaluated annually by the board?

Yes

CLP.27 Does the evaluation of the chief executive include a formal, written review?

Yes

CLP.28 Does the annual evaluation of the chief executive include setting mutually agreed upon performance goals?

Yes

CLP.29 Does the board periodically review chief executive compensation at comparable organizations?

Yes

Benchmark: % of boards that have each policy in place: 

CLP. CEO Supervision	YES
CLP.25 Does the chief executive have a written job description?	90%
CLP.26 Is the chief executive's performance evaluated annually by the board?	79%
CLP.27 Does the evaluation of the chief executive include a formal, written review?	67%
CLP.28 Does the annual evaluation of the chief executive include setting mutually agreed upon performance goals?	69%
CLP.29 Does the board periodically review chief executive compensation at comparable organizations?	62%

Board Information

CLP.30 How many voting members currently serve on the board?

Your Board

Average 

27

16

CLP.31 How many times did your full board meet during the past 12 months?

Your Board

Average 

10

7

CLP.32 How many hours does a typical board meeting last?

Your Board

Average 

2

3.8

CLP.33 During the past year, on average, what percent of the board attended meetings?

CLP.34 What percent of board members made a financial contribution last year?

CLP.35 How many committees does your board have?

Your Board

Average ▾

75

79

Your Board

Average ▾

100

73

Your Board

Average ▾

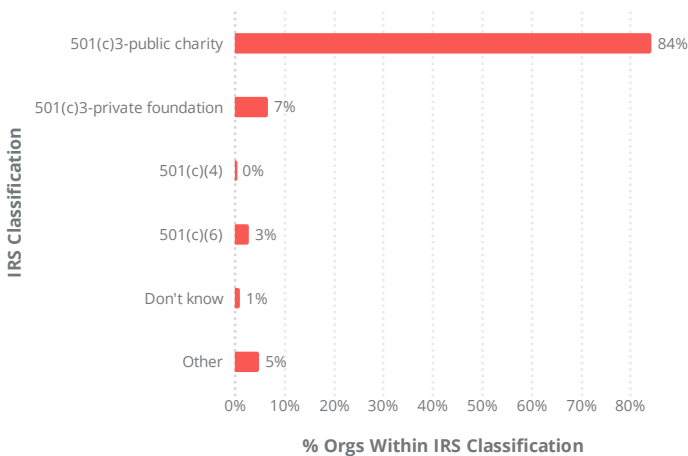
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5

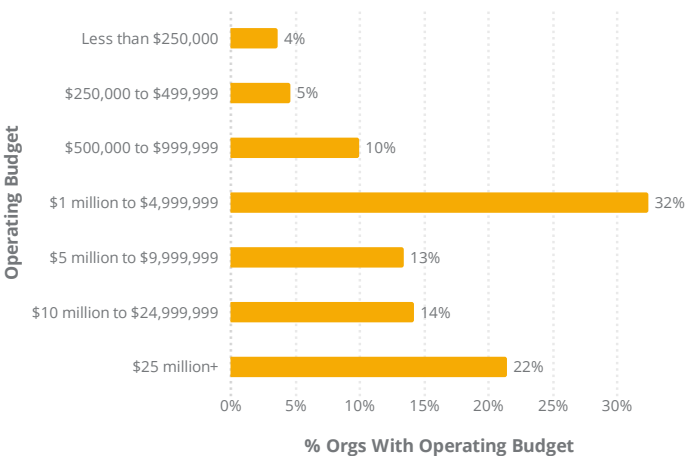
Organizational Demographics

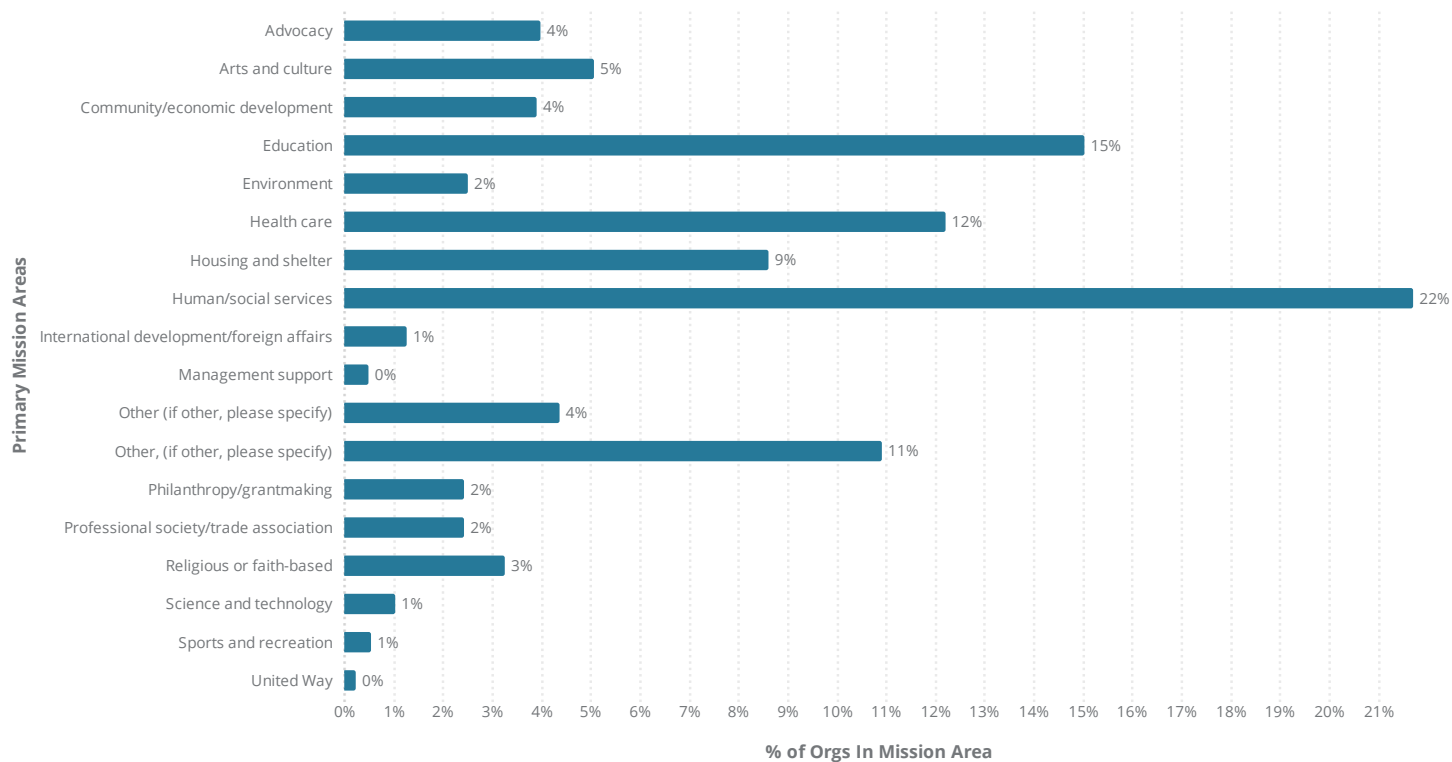
(Reported data reflects responses by Chief Executives who completed the Checklist of Practices section of questions)

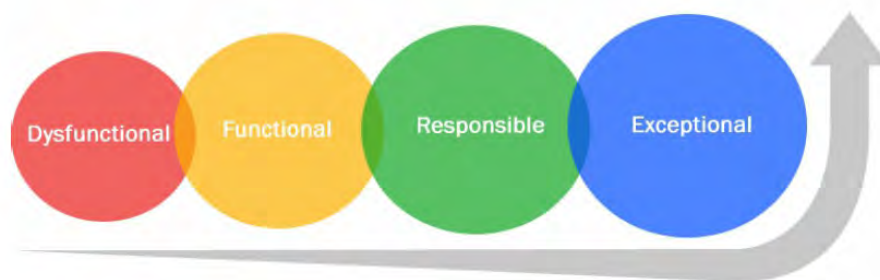
IRS Classification 2,588 ⓘ ▾



Operating Budget 2,562 ⓘ ▾







Taking Actions

Exceptional boards are a strategic asset to be leveraged by the organization. They add significant value and make a discernible difference in the organization's advancement of mission. Use this report as a tool to guide your board on the path to exceptional performance.

Take action. The board self-assessment establishes a platform for setting board priorities. The final step is identifying areas for growth. To help your board do this, consider the following questions:

1. What stands out? Is there anything in the report that is especially surprising, or that you'd like to understand better through conversations as a full board?
2. Does the board seem to be well aligned in terms of its assessment of its performance, or are there indications that different board members are experiencing the board's leadership performance differently? If the latter, why might that be?
3. To what extent is your board meeting its own expectations? In what ways is the board happy with its leadership performance, and where is it signaling a desire to improve? Do any natural priorities emerge from the ratings?
4. Based on what you see in the self-assessment, what are the top one to three areas where you think the board should focus its board development efforts?

Develop a board action plan. Once the board has agreed on its priorities, use a board action plan to help the board develop a clear approach to achieving its goals and staying accountable.

1. What steps can we take to ensure that information from the evaluation is used to improve the performance of the board?
2. Who or what committee is responsible for initiating and leading board development and assessment? Does it have the necessary resources and authority to fulfill its responsibilities?
3. Every board should have clearly established guidelines that outline the duties and responsibilities of individual board members. Are our board members held accountable to these standards? Do we have a process for removing nonperforming board members?

Check your progress. Only the board can hold itself accountable for its own performance. Periodically revisit the results from the self-assessment and action plan, celebrate the successes, and recommit to those areas that need further attention.

Repeat. BoardSource recommends conducting a thorough board self-assessment every two to three years and using the intervening time to work on the action plan you develop.

Deeper Support

Looking to go deeper? Consider investing in the Board Support Program, or reaching out to a consultant from our network.

Board Support Program

BoardSource's [Board Support Program](#) provides year-round governance guidance, resources, and leadership development to you, your board, and your organization.

Key benefits include:

- Complimentary Assessment Product
- Access to the [BoardSource Exchange](#)
- On-demand [Certificate of Nonprofit Board Education](#)
- Ask-an-Expert Email Service
- Members-Only Downloadable & Written Resources

Consultant Directory

BoardSource knows that – many times – there is no replacement for direct support and guidance from a [knowledgeable board consultant](#). That's why BoardSource has built relationships with a broad network of consultants from across the country who bring a wide range of strengths and experiences working with nonprofit boards.

New to selecting a consultant, or need a little help getting started? Check out this resource page:

[Choosing a Consultant FAQ](#)

Contact Us

Assessments Questions: assessments@boardsource.org
Membership or General Inquiries: members@boardsource.org

About BoardSource

About Us

BoardSource envisions a future where the nonprofit community has the leadership to fulfill its purpose and create a just world where all can thrive. Our mission is to inspire and support nonprofit boards and executives to lead justly and with purpose.

Established in 1988, BoardSource's work is grounded in the fundamental belief that boards are critical to organizational success. With decades of hands-on experience working with and supporting nonprofit boards, BoardSource is a go-to resource for nonprofit board and executive leaders. BoardSource supports a broad and diverse cross-section of social sector organizations with

- leadership initiatives addressing key opportunities and issues within the nonprofit sector
- research and benchmarking of board composition, practices, and performance
- membership and board support programs
- performance assessment tools
- a comprehensive library of topic papers, publications, and downloadable infographics, tools, templates and more
- live and virtual education and training

A note to our global readers

The need for effective board leadership and governance knows no geographic boundaries, and BoardSource is committed to strong social sector board leadership and governance around the globe. While BoardSource uses United States laws and policies as the legal framework for our resources and recommendations, most of our resources do not focus on legal matters but rather on good governance practices, making them relevant to organizations working outside of the United States. We do suggest, however, that you refer to applicable laws in your country regarding financial reporting and other legal and transparency issues.

BoardSource is a 501(c)(3) organization.

For more information, please visit our website at www.boardsource.org, e-mail us at mail@boardsource.org, or call us at 800-883-6262.

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

SEPTEMBER 16, 2025
MINUTES

LIFT Community Action Agency's Head Start/Early Head Start/EHS-CC Policy Council met on Tuesday, September 16, 2025 at 10:30 a.m. at 1005 S. 5th Street in Hugo, Oklahoma. Notice of time, place and agenda of meeting was posted within prominent view at 1005 S 5th Street, Hugo, Oklahoma twenty-four (24) hours prior to the meeting.

The meeting was called to order at 10:35 a.m. by Darla Galyon, HS/EHS/EHS-CC Director. A quorum was established. Members present (2024/2025)-Brittany Ransom- Antlers I, Shade Dill- Boswell I, Christie James- Horace Mann III, Bessi Black, Clinton Crawley and Patsy Guess- Community Representatives.

HS/EHS/EHS-CC staff present included: Darla Galyon; HS/EHS/EHS-CC Director, Mattie McKee; EHS-CC Assistant Director, Lori Henry; HS/EHS/EHS-CC Secretary, Ronda Spear; Health Assistant Specialist, Susie Mashburn; Education Specialist, Sommer Springfield; Assistant Education Specialist, Sara Moore; Professional Development Specialist, Brittany Bailey; ERSEA Specialist, Christina Merritt; Family/Community Engagement Specialist, Ashley Stinson; Disability/Mental Health Specialist, Lisa Gamblin; FCE/Disability Assistant, Tori Williams; Health Specialist, and Ashley Gaddy; Outreach Specialist.

Consideration and Possible Action to Accept the minutes from the August 19 2025 meeting. Copies of the minutes were provided to the council for review. Bessi Black made a motion to accept the minutes as presented, Patsy Guess seconded, all voted in favor, motion passed.

Consideration and Possible Action on the new Policy Council members for 2025-2026 school year as recommended be each Center Parent Committee to replace existing Policy Council Members: Brittany Ransom made a motion to approve the 2025/2026 Policy Council Members and Clinton Crawley seconded the motion. The motion carried. Roll was called for the following 2025/2026 members present: Keri Smith-Antlers, Heather Ainsworth-Boswell I, Steve Woldanski-Boswell II, Shalisa Neal-Broken Bow I, Christie James-Horace Mann II, Travi Anna Wright-Horace Mann III, Kelly Freelove- Hugo II, Gene Taylor- Hugo IV, Brandi Hobbs-Idabel I, Kylie Wilcox- Idabel II, Leslie Palmer- Rattan I, Bessi Black, Clinton Crawley, Patsy Guess and Shade Dill Community Representatives.

Consideration and Possible Action to Approve Community Representatives: Consuelo Splawn-LIFT Board Member, Clinton Crawley-Washington Community Center, Bessi Black-Choctaw County Library, Patsy Guess- Kiamichi Technology Center, and Shade Dill- CEO-

Higher Thought Leadership, LLC. Michelle Palmer made a motion to approve and Steve Woldanski seconded the motion. All voted in favor and the motion passed.

Nomination and Election of the Following Officers: Chairperson, Vice-Chairperson and Secretary for the 2025-2026 School Year: Darla Galyon, HS/EHS/EHS-CC Director explained the roles and responsibilities of each position and then asked for nominations/volunteers: Kylie Wilcox, Idabel II volunteered for Chairperson, Kelly Freelove, Hugo II volunteered for Vice-Chairperson and Heather Ainsworth, Boswell I volunteered for Secretary. There were no other volunteers/nominations, Shade Dill made a motion to appoint the officers and Bessi Black seconded the motion. The motion carried.

Policy Council Training: Orientation including Robert's Rules of Orders, Roles & Responsibilities and Policy Council Operating Procedures: Sara Moore, Professional Development Specialist provided a Hand out along with a Power Point and an overview/discussion and all questions were answered, on Robert's Rules of Order, Roles & Responsibilities, and Policy Council Operating Procedures.

Consideration and Possible Action to Enter into Executive Session to Discuss the Employment, Transfer, Hiring, Appointment, Promotion, Demotion or Disciplining of employees: Melissa Faust, Rattan SNA; Sharla Park, Rattan Cook; Lena Stout, Forest Grove I Teacher Aide; and Lindie Williams, Program Clerk, pursuant LIFT, CAA Okla. Stat. title 25§ 307 (b) (1). No motion was made to enter into executive session.

Consideration and Possible Action to Adjourn Out of the Executive Session and the Regular Board Meeting Be Reconvened. Did not enter into Executive Session.

Consideration and Possible Action to Approve New Hires, Transfers and Terminations Recommended by the Personnel Committee. Motion to approve the new hires and transfers was made by Bessi Black, seconded by Clinton Crawley, all voted in favor, motion passed.

Consideration and Possible Action on the Submittal of the Head Start/Early Head Start Child and Adult Care Food Program (CACFP) Application to Oklahoma Dept. of Education in the amount of \$688,050 (Based off of prior year funding): Darla Galyon, HS/EHS/EHS-CC Director stated that this was an annual renewal process and that the reimbursement is based on what the program was provided from the prior year's funding. This money goes towards cooks' salaries, food cost, and supplies for the kitchen. Kelly Freelove made a motion to approve submittal and Michelle Palmer seconded the motion. The motion carried.

Consideration and Possible Action on the 2025-2026 Head Start Mental Health Contract with Healing Hearts Counseling and Consulting, LLC: Mattie McKee, HS/EHS/EHS-CC Assistant Director explained that Healing Hearts Counseling and Consulting, LLC was selected through a bid process in alignment with the agency's financial and procurement policies. Kelly Freelove made a motion to approve and Kylie Wilcox seconded the motion. The motion passed.

Consideration and Possible Action on the 2025-2026 Head Start Training and Technical Assistance Plan: Mattie McKee, HS/EHS/EHS-CC Assistant Director stated that the provision of technical assistance and training for the Head Start/Early Head Start Programs serves to

improve program quality. Head Start/Early Head Start staff receive a combination of Pre-service and In-service training as well as various other training opportunities. Trainings provided are based on staff needs, self-assessment, new best practices, training needs assessment, individual professional development plans, and Head Start Performance Standards. In addition to program staff, the Training and Technical Assistance Plan also includes development opportunities for the Policy Council and Board of Directors. The proposed plan outlines how the \$59,260 (Head Start: \$39,956 EHS: \$19,304) allocated for training and technical assistance will be expended during the 2025-2026 program year. Shade Dill made a motion to approve the Training and Technical Assistance Plan and Kelly Freelove seconded the motion. The motion carried.

Training/Discussion Concerning Compliance with Children's Internet Protection Act (CIPA) Cyberbullying Awareness: Mattie McKee, HS/EHS/EHS-CC Assistant Director presented information on CIPA and Internet safety and filtering software required within Head Start/EHS/EHS-CC Classrooms.

Training/Discussion: Head Start/EHS/EHS-CC Program Information Reports: Darla Galyon; HS/EHS/EHS-CC Director, provided a copy of the Program Information Report. A Program Information Report is required to be conducted annually for all Head Start and Early Head Start programs. The reports cover a range of topics from teacher qualifications to family needs to enrollment. These reports are used on a National level to survey programs and evaluate operations. Darla Galyon provided a summary overview of each report and their use as a continuous quality improvement/assessment tool, then facilitated discussion with the Policy Council concerning the reports. Darla Galyon noted that this year's reports may appear slightly skewed due to the change in funded enrollment following the approval of the Change in Scope – Enrollment Reduction Amendments for the Head Start and EHS–Child Care Programs. She further explained that the updated funded enrollment figures will be reflected in future reports, ensuring greater accuracy in program data and performance comparisons moving forward.

Consideration and Possible Action to accept HS, EHS, EHS-CC, SAF, Community Facilities, OECP, USDA, and Non-Fed July 2025 Financial Statements and Credit Card Distribution Reports. Darla Galyon, HS/EHS/EHS-CC Director gave an overview of the financials along with an explanation of where non-fed monies come from for members present. It was recommended by the Finance Committee to approve the financials. Bessi Black made a motion to accept, seconded by Kelly Freelove all voted in favor, motion passed.

Presentation of August, 2025 Financial Statements and Credit Card Distribution Reports: Darla Galyon, HS/EHS/EHS-CC Director presented the August, 2025 Financials along with and overview of the financials and an explanation where non-fed monies come from for Consideration, Discussion and Possible Action at the October 21, 2025 meeting.

Other Reports/Announcements:
Recruitment & Enrollment Update/Enrollment and Attendance Report-Brittany Bailey, ERSEA Specialist: Brittany Bailey reported that as of today, 9/16/2025 220 children are currently enrolled in Head Start for the 2025-2026 School Year. Recruitment is an ongoing

process and are still be accepted and processed. Early Head Start currently has 46 children enrolled and attendance was 88.8%. Early Head Start-CC currently has 99 children enrolled and attendance was 84.4%.

USDA Meals and Snack Report-Lauren Barger, Darla Galyon, HS/EHS/EHS-CC Director provided a copy and an overview summary of meals and snacks served for August 2025.

Governing Board Report: Mattie McKee- Mattie McKee reported the Governing Board met on September 9, 2025 and gave an overview of the agenda, which was attached for review and that all HS/EHS/EHS-CC items were approved.

Data Analysis-Jordan Mack- Darla Galyon, HS/EHS/EHS-CC Director gave an overview of the data assessed for August, 2025

OHS Communications and Guidance-Darla Galyon presented and reviewed all OHS Communications and Guidance received since the last council meeting.

Program Summary Report-Darla Galyon presented the HS/EHS/EHS-CC Program Summary for the council to review.

Completion of Policy Council Survey Forms-Lori Henry: Required Survey forms were explained, reviewed and completed by Policy Council members that were present.

Training on forms-Lori Henry: Mileage and In-Kind Forms were reviewed that showed the policy council members the proper paperwork procedure. These forms will be used for every meeting and it was clearly explained the importance of proper completion of these forms.

Volunteers to Serve on Finance Committee, HSAC, FCPAC & School Readiness

Committee: Mattie McKee, HS/EHS/EHS-CC Assistant Director explained to the council the function of each committee, the duties they would have and how often each committee meets. She then asked for volunteers to serve on the committees. The following members volunteered to serve on the committees:

Finance Committee

Bessi Black
Michelle Palmer
Steve Waldanski
Clinton Crawley

Health/MHPAC Committee

Bessi Black
Heather Ainsworth

FCPAC

Heather Ainsworth
Bessi Black

School Readiness

Shade Dill
Michelle Palmer
Bessi Black

Consideration, Discussion, and Vote on New Business (Not known about or which could not have been reasonably foreseen prior to time of posting the agenda. Okla. Stat. Title 25 § 311):
There was none.

There being no other business to come before the board, the meeting ended at 12:10 p.m.

Kylie Wilcox-Chairperson
Kelly Frelove-Vice-Chairperson
Heather Ainsworth-Secretary



Employee of the Month Nomination

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

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

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

Date: 10/2/2025

Name of Person being nominated for Employee of the Month: John FreeLove

Name of Person submitting the nomination: Jeannie McMillin

- | | | |
|----------|--|--|
| <u>X</u> | Is a hard worker | <u>John gives 100% to any task he is doing</u> |
| <u>X</u> | Respects others | <u>John is very respectful to passengers and coworkers</u> |
| <u>X</u> | Is on time | <u>John is consistently punctual</u> |
| <u>X</u> | Is organized | <u>John has a well-established routine that he follows to be productive every day.</u> |
| <u>X</u> | Keeps a positive attitude | <u>John has a great attitude with passengers and coworkers</u> |
| <u>X</u> | Encourages other people | <u></u> |
| <u>X</u> | Is willing to help others | <u>John willingly helps as needed</u> |
| <u>X</u> | Makes a good first impression | <u>John dresses neatly and presents himself well</u> |
| <u>X</u> | Follows all workplace rules | <u>Commended by the trainer as the driver who consistently observes all safety rules</u> |
| <u>X</u> | Uses resources wisely | <u></u> |
| <u>X</u> | Has good work attendance | <u>John rarely misses work.</u> |
| <u>X</u> | Represents the agency well | <u>John is friendly and has a great relationship with passengers and coworkers</u> |
| <u>X</u> | Is a loyal employee | <u>John never hesitates to pitch in and do whatever he can to make the program succeed</u> |
| <u>X</u> | Handles crisis well | <u>John remains composed in all situations</u> |
| <u>X</u> | Goes above and beyond the call of duty | <u>John's care and concern for his passengers is evident every day</u> |
| <u>X</u> | Works well with others (team player) | <u>John is friendly and works hard</u> |



_____ Is creative _____

_____ Likes to learn new things _____

X _____ Is a good listener John's passengers love the attention and respect he shows them.

X _____ Communicates well _____

X _____ Dependable _____

X _____ Respectful, considerate of others The elderly passengers really like John as their driver

X _____ Safety conscious John consistently follows all training and safety rules

x _____ Good problem solving skills _____

_____ Other _____

_____ Other _____

_____ Other _____

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

John Frelove is a transit driver at the Antlers Transit location. He has built an exceptional relationship with his passengers there. When people call in for rides, they want to know that John will be the one picking them up. He sincerely cares about his passengers and this concern is felt by them in the way they interact. He can tell you who lives where and what they usually need the transit service for. This kind of interaction has led to a growth in the number of trips for the Antlers local in-town route.

John will tell you that he loves his job and this is proven by his good attendance and the positive attitude he has every day. The trainer stated that she is confident that John fully follows all of the training he received in orientation which means he will consistently uphold safety protocols.

John is a great asset to LIFT CAA. His attitude and work ethic make him a valuable member of the transit team.

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 (kjames@littledixie.org). Nominations are judged by a five-member committee. If the person you nominate is not selected, it is okay to nominate that person again the following month if you feel he/she is deserving of the award.

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

Program Summary
Head Start/Early Head Start/Early Head Start-Child Care Programs
September 2025

Eligibility, Recruitment, Selection, Enrollment & Attendance

During the month of September there were 47 children, age birth to 3, that were provided services in the Early Head Start centers and 100 children served, age birth to 3, in the Early Head Start – Child Care locations. Services were provided for 223 children, age 3 to 4 years old in the Head Start centers within the tri-county service area.

The Outreach Specialist prepared and sent out flyers and posters that reached across our service area. Our ad was included on local restaurant menus. Daily social media posts are also made on our LIFTCA Facebook page.

Family Advocates and other Head Start, Early Head Start, and Early Head Start Child Care staff have been placing recruitment flyers, recruitment apple signs, recruitment cards and other recruitment items in and around various businesses within the tri-county service area, along with placing recruitment items online, to ensure all enrollment opportunities are filled as they occur. Partnering childcare facilities are also actively recruiting children for the program.

Family & Community Engagement

For the Month of August, we had 185 parents that participated in Parent Meetings. Family Advocates are starting goals with families through the Family Partnership Agreements. The centers continue to invite parents and community members to participate in Parent Ready to Read by having a story time with the children; there were 38 participants, with 12 of them being father figures.

Father Involvement

The dad's day activities for the month of August were various fish activities, All about Me activities, and apple activities. For the month of August Dad's Day, there were 115 people, which participated in dad's day activities with 61 being father figures. In addition, 35 dads/father figures participated in parent meetings for August. Since the beginning of the 2025-2026 school year, we have had 108 father figures participate in family engagement activities.

Nutrition

In the month of September, the nutrition team participated in our yearly CACFP Training to kick off the new Fiscal Year, the training was very knowledgeable. The nutrition team is starting to dive into the new school year with our new nutrition paperwork, as well as getting the nutritional needs of children situated, we have been continuously tracking our special dietary needs they are growing daily. The red dye 40 has become a very popular issue this school year so far, we have made arrangements for any items containing the red dye ingredient to be removed from that said center along with any other allergies the same precautions are taken. The nutrition team has started 3rd quarter EHS and EHS-CC folders check, we also have started 1st semester folders checks for Head Start also. We are ending our fiscal year for the CACFP this month. We are starting to get things ready to start our CACFP kitchen checks come October.

Health

During the month of September employee physical tracking continued with reminder phone calls and emails to staff on past dues and upcoming. Monthly reports are due to Jordan Mack by the 15th of each month. One CPR class was held. We continue to receive updates for Child Plus immunizations. Head Start Physicals have a completion rate of 76% (that's amazing) and Head Start dentals are at a 70% completion rate (that's amazing). EHS & CC have an 83% completion rate for physicals and a 88% completion rate for dentals. An update of past due and due health requirements was emailed to CC/ELC, EHS, & HS centers and called to inform them of the screenings that are due.

Education

With autumn on its way, our classrooms are beginning to begin field trips to various places. In September, Forest Grove 1 & 2 attended the McCurtain County Fair. Idabel Early Head Start, Early Head Start Child Care, and Idabel 1,2, and 3 entered activities in this fair. The various sights, sounds, and smells give children opportunities they normally do not see in their everyday life. These experiences help children learn self-control and following directions. While seeing animals and the various projects, they are learning new vocabulary, extending their attention spans, paying attention to details, seeing older children nurture various animals, and observing a work ethic that is vital to a healthy lifestyle.

Professional Development

During the month of September, the Professional Development Specialist scheduled CPR/First Aid classes taught by LIFT CPR Instructors Tori Williams and/or Ronda Spear, where LIFT employees received or renewed their Adult and Infant CPR and First Aid certifications. The Professional Development Specialist scheduled an ELCCT class in which newly hired LIFT HS/EHS/EHS-CC employees participated.

Also, with the help of the Professional Development Specialist, several staff members renewed their Professional Development Ladders and/or Oklahoma Director's Credentials in September. 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

We have had a great start to the 2025-2026 school year!

Sooner Start has a new online process for referrals that go directly to the Oklahoma State Department of Education. This has significantly streamlined the referral process and has made a positive impact on referral time. This month, there have been two children from Early Head Start referred. There are three children in the EHS-CC program that have been referred and identified to receive services.

In Head Start, there are twenty-four children that have been referred to the public school for an evaluation to determine eligibility for services. There are eighteen children who are currently

receiving services. Speech is the primary service being provided. We have children who are currently still being identified in the referral process.

We have a new mental health consultant firm which is Healing Hearts. We are very excited to work with Dana Nash and her team. They will be heading into classrooms soon to provide observations and follow up activities and resources. Teachers and parents will have the opportunity to visit with the consultant in or out of the classroom A written report will completed by the consultant for each classroom with ideas to share with teachers and parents.

Recruitment/Outreach

The following recruitment and outreach strategies/activities were implemented or held during the month of September 2025.

Choctaw County Fair

HS/EHS/CC participated in the Choctaw County Fair booth that LIFT CAA set up for our agency. Program information was provided to families who visited our booth.



Radio Ad for September

Narrator (friendly, inviting voice):

Hey parents — have you heard about LIFT Head Start, Early Head Start, or Early Head Start Child Care?

Parent (genuine, emotional voice):

I have. And honestly, it changed everything for my family.

Narrator:

Tell me more.

Parent:

I was juggling work, bills, and trying to care for my children. Then I found out Head Start offers **free, full-day care for kids ages 0 to 4** — with **meals, snacks, formula, diapers, and school supplies included**. I couldn't believe it.

Narrator:

That's incredible. And it's available in **Antlers, Boswell, Broken Bow, Forest Grove, Fort Towson, Hugo, Idabel, Rattan, and Soper**.

Plus, **Early Head Start and Early Head Start Child Care** are in **Antlers, Broken Bow, Hugo, and Idabel** — perfect for infants and toddlers.

Parent:

And here's the best part — if you get **SNAP benefits**, you're **automatically eligible to apply**.

Narrator:

That's right. No stress, no guesswork. Just support when you need it most.

Parent:

My child is learning, growing, and smiling every day. And I finally feel like I'm not alone.

Narrator:

Apply today at www.liftca.org or call **580-326-7581**.

Head Start — where brighter futures begin.

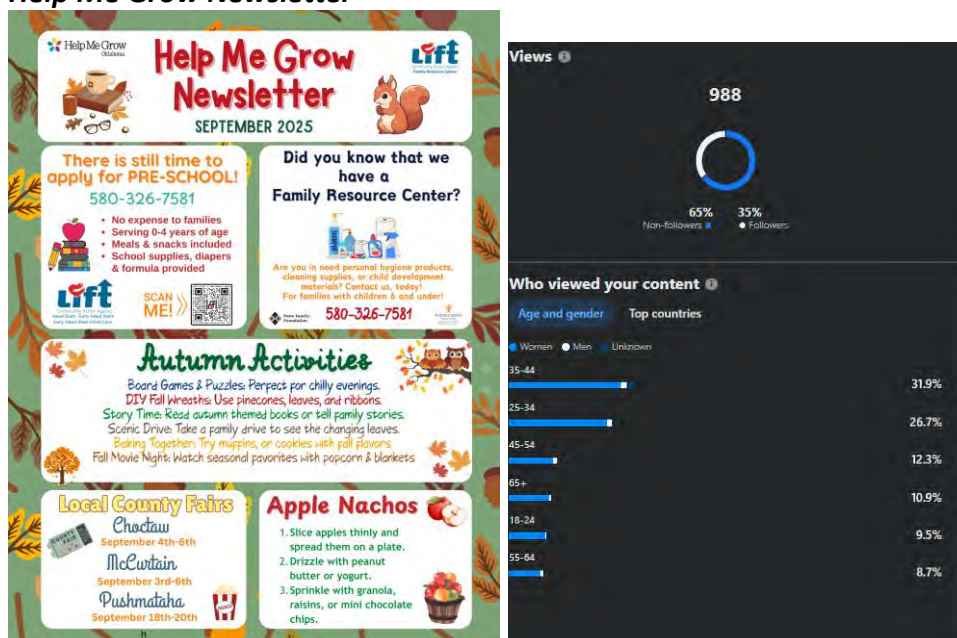
Antlers High School Football Program

To increase community awareness and promote early childhood services, HS/EHS/EHS-CC purchased an advertisement in the local high school football program. This outreach effort aims to connect with families in a familiar setting, highlighting free preschool, health screenings, and family support services available to eligible households. The ad reinforces Head Start's commitment to supporting children's development and family well-being within the community.

Community Partner Meetings

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

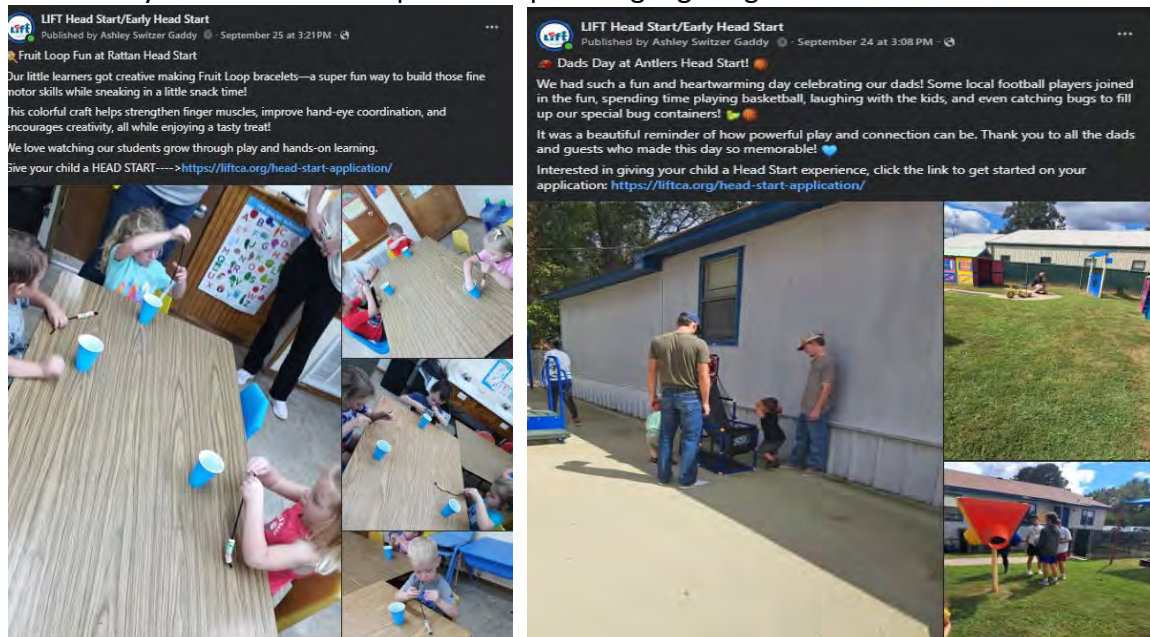
Help Me Grow Newsletter



Social Media Classroom Highlights

With the start of the new school year, we have initiated efforts to highlight classroom activities as a means of strengthening parent engagement and increasing visibility of our Head Start program.

These social media highlights showcase the enriching experiences children are having in our classrooms and serve as a valuable tool for promoting our services to families and the broader community. Below is an example of our posts highlighting classroom activities.



Angie's Kid Menus

Angie's Circus City Diner called and requested more kid menus. This allows us to continue to make the community aware of our services by highlighting our programs on their kid menus, while also helping them out by supplying them.



Every Door Direct Mail

3900 mail pieces were sent out to Idabel postal routes. Each resident received a flyer in their mailbox. Routes were carefully selected to ensure delivery to the most vulnerable populations.

Target Audience								View as: Map Table	
☐	Route	Residential	Business	Total	Age: 25-34	Size	Income	Cost	
☒	74745-C001	860	43	903	14.1%	2.57	\$19.63k	\$223.04	
☒	74745-C003	489	195	684	19.6%	2.58	\$41.72k	\$168.95	
☒	74745-C004	131	8	139	12.8%	2.46	\$28.09k	\$34.33	
☐	74745-PBOX	—	—	352	— %	—	—	\$86.94	
☒	74745-R001	513	3	516	10.5%	2.58	\$54.24k	\$127.45	
☒	74745-R002	552	13	565	10.8%	2.46	\$61.68k	\$139.56	
☒	74745-R003	516	62	578	12.4%	2.46	\$60.88k	\$142.77	
☒	74745-R004	482	53	535	12.6%	2.59	\$47.62k	\$132.15	
☐	74745-R005	504	86	570	10.5%	2.58	\$54.24k	\$140.79	

Order Summary

Selected Routes
7

[Post Office™ Drop-Offs](#)
1

Total Mailpieces
3920

Approximate Cost ⓘ
\$968.24

[Next Step](#)

[Save Order](#)

[Clear Routes](#)



PRE-SCHOOL
Questions?
Call us!
580-326-7581

WE PROVIDE QUALITY
EARLY CHILDHOOD
EDUCATION!
WWW.LIFTCA.ORG

WHY CHOOSE US?

- NO EXPENSE TO FAMILIES
- SERVING 0-4 YEARS OF AGE
- SCHOOL SUPPLIES PROVIDED
- MEALS, SNACKS, FORMULA, & DIAPERS INCLUDED

LOCATIONS:

Early Head Start: Antlers, Broken Bow, Hugo, Idabel

Head Start: Antlers, Boswell, Broken Bow, Forest Grove, Fort Towson, Hugo, Idabel, Rattan, Soper

DO YOU RECEIVE SNAP BENEFITS?

If so, that makes you automatically eligible to apply for our program!

SCAN ME!



REQUESTED DOCUMENTS:

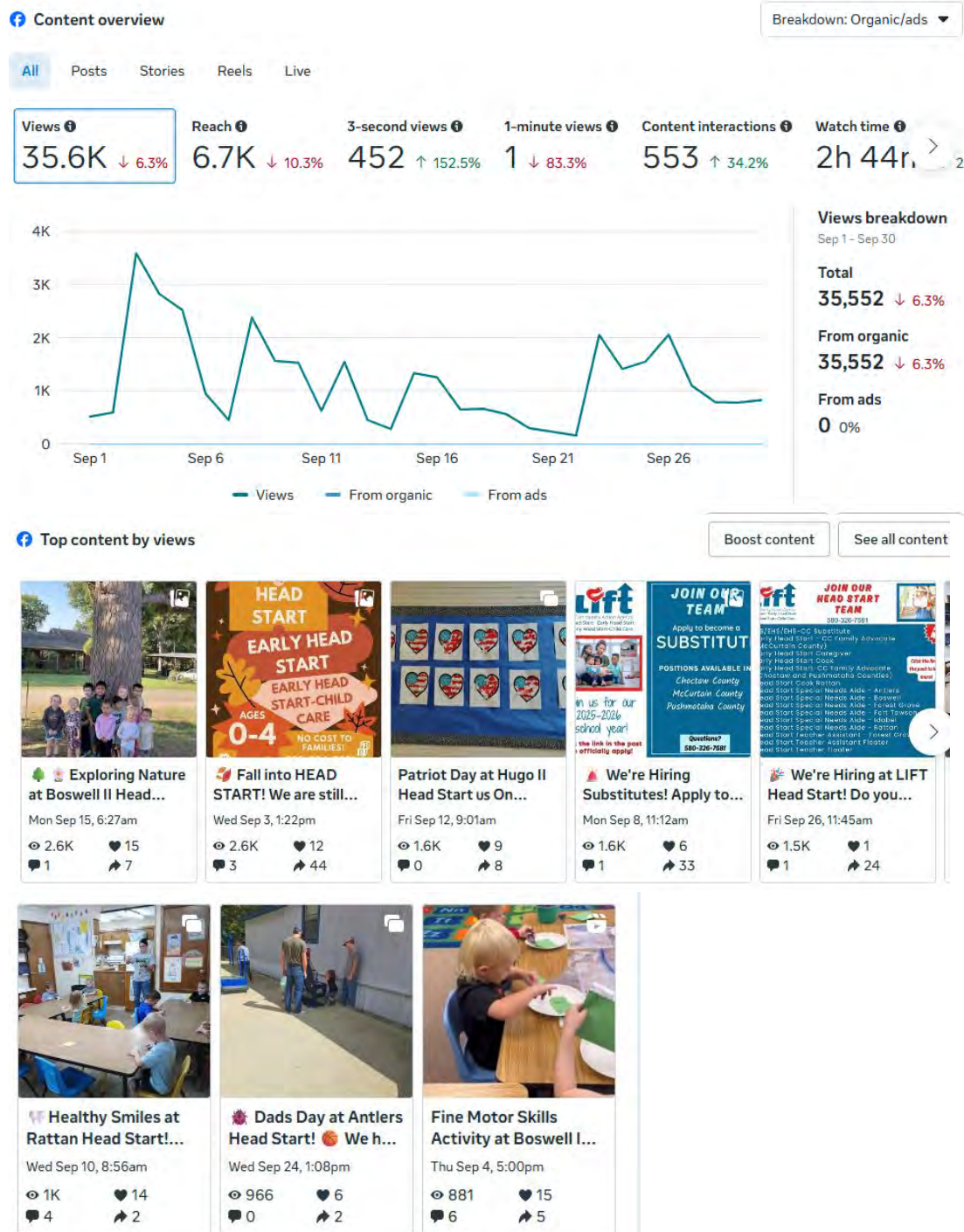
- Child's Birth Certificate
- Child's Immunization Record
- Proof of income for all family members
- Copy of records if your child has been diagnosed with a disability, IEP, IFSP

Social Media Impact

This month, the Family Resource Center continued to prioritize daily social media engagement, recognizing its significant impact in reaching families and raising awareness. Posts include program updates, community resources, classroom highlights, Head Start news, and family engagement activities. These efforts are designed to increase visibility, encourage interaction through likes, comments, and shares, and ultimately strengthen connections with families and community partners.

While overall views and interactions on our Facebook page experienced a slight decrease compared to the previous month, engagement remains strong and consistent. The steady flow of content has helped maintain visibility and connection with our audience. These insights provide valuable direction as we refine our outreach strategies to better meet the needs and interests of

families. We remain encouraged by the continued interactions and will use this data to guide future content planning and engagement efforts.





New to HeadStart.gov in September 2025

Wondering what's new from the Office of Head Start? This collection features all of the great content posted to [HeadStart.gov](https://www.headstart.gov) last month. It also includes last month's email announcements and newsletters for Head Start and other early childhood professionals.

Select the links below to find information and tools that support your work with children and families. Use the [Español button](#) on each page to see its Spanish translation.

News from OHS

Implementing Effective Mental Health Consultation Toolkit



This toolkit helps Head Start administrators develop and implement a multidisciplinary approach to mental health and mental health consultation.

[Visit the Page](#)

Other OHS News

- [Head Start Program Facts: Fiscal Year 2024](#)
- [New Awards for Tribal Home Visiting Total Over \\$3 Million to Support Pregnant Women and Families with Young Children](#) (email)

Training and Technical Assistance Resources

Early Childhood Development, Teaching, and Learning

- [The Magic of Music for Infants and Toddlers](#) (videos)

Health, Behavioral Health, and Safety

- [Building a Successful Health Manager Network](#)
- [Building Healthy and Safe Sleep Routines](#)
- [Preventing Childhood Lead Exposure from Water and Paint](#) (video)

Parent, Family, and Community Engagement

- [Family-centered Considerations for ERSEA](#)
- [Learning Course About Supporting Healing and Resilience for Family Services Staff](#)

Newsletters

- [Resources to Make You Smile! Issue No. 48](#)
 - Available in [Spanish \(español\)](#)

Head Start Careers



Center Manager

Troy, New York

[Get the Details](#)



Chief Financial Officer

Olivette, Missouri

[Get the Details](#)

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

Upcoming Events

- Tuesday, Sept. 9: [MyPeers Orientation for Managers and Coordinators](#)
- Wednesday, Sept. 10: [Empowering Child Care Professionals to Have Conversations with Families About Substance Use](#)
- Thursday, Sept. 11: [The Conversation Guide for Professionals on Substance Use, Children, and Families Training \[in Spanish\]](#)
- Monday, Sept. 15
 - [Introduction to Otoacoustic Emissions \(OAE\) Hearing Screening](#)
 - [Introduction to OAE Hearing Screening \[in Spanish\]](#)
- Wednesday, Sept. 17: [Using Reflective Practice and Supervision to Support Staff Wellness](#)
- Thursday, Sept. 18: [Exploring a Coaching Approach for Family Services Professionals](#)

- Monday, Sept. 22: [Infant and Early Childhood Mental Health Consultation National Office Hours](#)
- Tuesday, Sept. 23
 - [Introducing the 5Rs Toolkit for Early Learning Leaders](#)
 - [MyPeers Orientation for Early Head Start and Home Visiting Staff](#)
- Thursday, Sept. 25: [The Conversation Guide for Professionals on Substance Use, Children, and Families Training \[in Spanish\]](#)

Visit [HeadStart.gov](https://www.headstart.gov) for a full list of [upcoming events](#).

[Join the Conversation on MyPeers](#)

Sign up in just seconds to connect with Head Start and early childhood colleagues around the country on this and other topics. Community members are already networking, sharing, and learning from each other.

Did Someone Forward You This Email?

[Subscribe now for the latest Head Start updates.](#)

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).



The Office of Head Start (OHS) supports children's growth from birth to age 5 through services focused on early learning and development, health, and family well-being.

 Visit [Headstart.gov](https://www.headstart.gov)

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Fiscal Year 2026 Monitoring Process for Head Start Recipients

 headstart.gov/policy/im/acf-ohs-im-25-05

Fiscal Year 2026 Monitoring Process for Head Start Recipients ACF-OHS-IM-25-05

U.S. Department
of Health and Human Services

ACF
Administration for Children and Families

1. **Log Number:** ACF-OHS-IM-25-05
2. **Issuance Date:** 09/25/2025
3. **Originating Office:** Office of Head Start
4. **Key Words:** Monitoring; FY 2026; CLASS®

Information Memorandum

To: All Head Start Grant Recipients

Subject: Fiscal Year 2026 Monitoring Process for Head Start Recipients

Information:

[Section 641A](#) of the Improving Head Start for School Readiness Act of 2007 (the Act) requires the Office of Head Start (OHS) to monitor programs to make sure they meet quality and compliance standards. This Information Memorandum (IM) explains the monitoring process for fiscal year (FY) 2026, including updates to review formats and when reviews will take place during a grant period.

OHS is committed to strong program management, protecting children's health and safety, and ensuring effective oversight. To support these priorities, OHS has refined the monitoring approach to be more focused, efficient, and responsive to program needs. This year, updates to monitoring reviews include streamlining and clarifying review questions, reducing the total number of questions from 449 in FY25 to 203 for FY26 (54.8 percent decrease overall), and shortening on-site review days from 5 days to 3 or 3.5 days. These updates focus reviews on the most critical elements for child safety and program integrity, as well as reviewing for compliance with all applicable state statutes and regulations for licensing. These updates help strengthen systems early in the grant cycle, support fiscal integrity, and allow more on-site

visits sooner in the process to ensure that there is a strong organizational foundation early in the grant cycle. Together, these updates keep our partnership with recipients strong while maintaining accountability to Head Start standards.

FY26 Monitoring Review Types starting October 2025

Review Type	FY26 Format	Start Date
Focus Area 1 (FA1): Program Systems Review	Reviews foundational systems that ensure strong operations, fiscal integrity, and child safety across all sites. Reviews happen in years 1 or 2 of the grant; using both virtual and on-site formats.	October 2025
Focus Area 2 (FA2): Comprehensive Services Review	Reviews the quality of education, health, and family services to strengthen child and family outcomes, and ensures implementation of eligibility, recruitment, selection, enrollment, and attendance (ERSEA) requirements.	October 2025
Classroom Assessment Scoring System (CLASS®)	Reviews happen in years three or four of the grant; using both virtual and on-site formats. Reviews teacher-child interactions. Reviews happen in years two through four of the grant, using a self-recorded video submission. <i>On-site reviews are available upon request.</i>	October 2025
Follow-up Reviews	American Indian and Alaska Native (AIAN) programs have the option to conduct a self-review. Both virtual and on-site formats, aligned to the nature of the findings.	As needed
Risk Assessment Notification (RAN) Reviews	Both virtual and on-site formats, aligned to the nature of the findings	As needed
Other/Special Reviews	Conducted on-site or virtually, with or without notice.	As needed

Note: QHS has the right to conduct unannounced reviews at any time.

FA1 Program Systems Review

The FA1: Foundational Systems Review happens in the first or second year of the grant cycle and includes a mix of virtual and on-site formats. This review focuses on program systems that support high-quality services while eliminating unnecessary burden for recipients. This review helps QHS understand each recipient's foundation for program services, including governance, staffing and supervision, service design, internal monitoring, fiscal capacity, and integrity, and ERSEA processes. This review type checks if programs meet the requirements of the Uniform Guidance, and the Head Start Act. Updates to the FA1 review this year include:

- Streamlining review questions – reducing the number of items reviewed in each content area by 30–50 percent to improve efficiency while maintaining rigor.
- Focusing earlier on critical systems – incorporating fiscal, governance, and ERSEA into the FA1 review to assess these foundational areas sooner in the grant cycle.
- Adding on-site engagement – introducing an on-site component, in addition to virtual formats, to strengthen understanding of program operations and the systems in place to keep children safe.

FA2: Comprehensive Services Review

The FA2: Comprehensive Services Review happens in the third or fourth year of the grant cycle and includes a mix of virtual and on-site formats. This review gives recipients the chance to show how they deliver high-quality services to children and families that meet Head Start requirements. The review looks at the quality of education, health, and family services; checks that ERSEA requirements are met; and reviews fiscal capacity and integrity. It also helps OHS understand each recipient's performance and confirm that programs meet the requirements of the Uniform Guidance, and the Head Start Act. Updates to the FA2 review this year include:

- Streamlining questions for clarity, making the review process more efficient and focused.
- Increasing the specificity of review items to provide more actionable feedback to recipients.
- Maintaining a strong focus on child safety, program quality, and fiscal integrity throughout the review process.
- Shortening the on-site portion from 5 days to 3.5 days, reducing burden while maintaining a thorough review.

CLASS® Reviews

Section 641A(c)(2)(F) of the Act requires OHS to assess the quality of teacher–child interactions using a valid and reliable observation measure. In FY26 OHS will continue using the 2008 edition of the CLASS Pre-K tool. Scores will count toward Designation Renewal System (DRS) decisions using the competitive thresholds set in the 2020 [final rule on DRS changes](#). A 2024 rule delays the increase in the CLASS Instructional Support competitive threshold from 2.3 to 2.5 until August 1, 2027.

In FY26, programs scheduled for a CLASS review will record and submit their own classroom videos (video review). On-site reviews with certified CLASS observers are available **only** by request.

AIAN Head Start programs can choose to do a self-review for their CLASS review. All AIAN grant recipients have the option for a self-review, including those that have consolidated their Head Start program into an approved Pub. L. 102-477 Plan.

All recipients will have the opportunity to attend information sessions specifically developed to discuss FY26 CLASS options, including a group of sessions convened specifically for AIAN recipients.

RAN Reviews

OHS conducts RAN reviews when there are serious child health or safety concerns due to a reported incident. These reviews start when OHS needs more information about a significant incident that occurred within a program. They focus on issues such as abuse, neglect, inappropriate conduct, inadequate supervision, or unauthorized release of a child.

RAN reviews are designed to:

- Make sure serious incidents are reported quickly and accurately
- Identify any program or management issues that contributed to the incident
- Share the corrective actions that are needed
- Provide feedback to help programs prevent similar incidents in the future

Other Reviews

OHS may conduct special reviews when there are concerns that fall outside the regular monitoring schedule. These reviews can be done on-site or virtually and may take place with or without advance notice. OHS also has the right to conduct unannounced reviews at any time.

Tribal Programs Integrated Under Pub. L. 102-477 Plans

As required by law, OHS will continue to work with the Tribe and the Bureau of Indian Affairs to conduct monitoring and oversight. Tribal grant recipients that include their Head Start program in a Pub. L. 102-477 plan should describe their monitoring approach in that plan. Information from these reviews helps determine continued Head Start funding through DRS. Programs may receive funds without competition only if the Administration for Children and Families (ACF) determines they provide a high-quality, comprehensive program.

For Tribal programs that are integrated under a Pub. L. 102-477 plan and choose to participate in OHS monitoring, OHS will continue to conduct monitoring and a CLASS review (self-review option available) to help ACF confirm the program is delivering a high-quality, comprehensive program.

Scheduling

Each year, programs must submit a calendar showing when programs are open and when children are in session. OHS uses this calendar to schedule monitoring reviews. If the schedule changes, programs should update their calendar right away. OHS can only approve rescheduling in exceptional situations. OHS may also conduct reviews without advance notice.

Communications

Programs scheduled for a monitoring review in FY26 will receive a notification letter 45 days before the review starts. The assigned review lead will also schedule a planning call to discuss the review and learn about the program's current service delivery. After the review, OHS will issue the report within 60 days.

Questions

For questions regarding FY26 monitoring, please contact the appropriate regional office.

Thank you for the continued commitment to the success of Head Start children and families.

Sincerely,

/ Tala Q. Hooban /

Tala Q. Hooban
CAPT, U.S. Public Health Service
Acting Director
Office of Head Start



Addressing Vacant Slots Due to Chronic Absenteeism in Head Start Programs

 headstart.gov/policy/im/acf-ohs-im-25-06

Addressing Vacant Slots Due to Chronic Absenteeism in Head Start Programs ACF-OHS-IM-25-06

U.S. Department
of Health and Human Services

ACF
Administration for Children and Families

1. **Log Number:** ACF-OHS-IM-25-06
2. **Issuance Date:** 09/26/2025
3. **Originating Office:** Office of Head Start
4. **Key Words:** Vacant Slots; Absenteeism; Enrollment Reporting; Attendance

Information Memorandum

To: All Head Start recipients, including Head Start Preschool, Early Head Start, Early Head Start-Child Care Partnerships, Collaboration Offices, and National Centers

Subject: Addressing Vacant Slots Due to Chronic Absenteeism in Head Start Programs

Information:

This Information Memorandum (IM) clarifies policy guidance on vacant slots in Head Start programs, with a focus on vacant slots due to chronic absenteeism.

Vacancies occur when a child who is enrolled in the program (and has attended previously) no longer attends for an extended period of time. This empty slot constitutes a missed opportunity for the child who is not attending a program and a missed opportunity for an eligible child who is waiting for Head Start services. Programs should work with the family to reinstate attendance or consider the slot vacant and fill it so the maximum number of eligible children can receive Head Start services.

This IM clarifies when Head Start programs should consider a child's slot vacant after long-term absences, underscores the importance of regular attendance, and offers strategies programs can use to enhance access and participation for children and families.

Clarifying Vacant Slot Requirements

The Head Start Program Performance Standards (Performance Standards), specify that a Head Start program must maintain its funded enrollment level and fill any open slots as soon as possible and within 30 days ([45 CFR §1302.15\(a\)](#)). This does not supersede any requirements set by a state on the timely enrollment of children in state funded programs.

The Office of Head Start (OHS) requires a program to report a slot as vacant as soon as the family or guardian communicates that the child is not returning to the program. The program must consider a slot vacant after a child has not attended for a **maximum** of 30 days (which should be counted as 30 consecutive calendar days) and a minimum of three attempts have been made to re-engage the family. Considering the slot vacant means the child will be unenrolled. This action is not considered expulsion as described in [§1302.17](#).

If a program has reserved one or more enrollment slots for children and pregnant women experiencing homelessness or children in foster care, it can hold that slot for 30 days (§1302.15(c)). If a reserved slot is not filled after 30 days, it becomes vacant and must be filled within 30 days. When filling vacant slots, programs are expected to refer to their waiting list, which ranks children according to the program's selection criteria as outlined in [§1302.14\(c\)](#).

The Performance Standards are also clear that programs must implement strategies to promote attendance, including using individual child attendance data to identify children with patterns of absence that put them at risk of missing 10 percent of program days per year. If a child ceases to attend, the program must make appropriate efforts to reengage the family to resume attendance ([§1302.16\(a\)\(3\)](#)). Efforts to reengage the family, at a minimum, include either directly contacting the parent or guardian or conducting a home visit. Each contact or attempted contact with the family must be documented in the child's file or in the program's record keeping system.

Considerations for Exceptions

The Performance Standards outline an expectation of filling any vacancies as soon as possible and within 30 days (§1302.15(a)), and OHS generally considers a slot to be vacant as soon as a family has confirmed the child is not returning to the program (or when a child has not attended for a maximum of 30 days), as described above. However, Head Start programs may develop policies and procedures that allow for limited exceptions to when a slot is considered to be vacant, as there are some unique circumstances that may factor into a child's attendance. Some examples may include: extenuating family circumstances that require a family to travel out of the service area for more than 30 days, a child with an extended illness or requiring hospitalization, a family recovering from a disaster, or a family emergency that might hinder a family's ability to ensure their child is able to get to the program. Programs must document the rationale for allowing the exception either in the child's file or in their record keeping systems.

In extraordinary circumstances, a child may be temporarily suspended from a Head Start program (§1302.17(a)). A temporary suspension may be used only as a last resort when there is a serious safety threat that has not been reduced or eliminated by the provision of interventions and supports recommended by the mental health consultant, and the program needs time to put appropriate services in place. In these instances, a temporary suspension would not count toward the maximum of 30 days before a slot is considered vacant. If a temporary suspension is deemed necessary, a program must help the child return to full participation in all program activities as quickly as possible while ensuring child safety. A program must explore and document all steps taken to address the behavior(s) and supports needed to facilitate the child's safe reentry and continued participation in the program as outlined in §1302.17(a)(4).

If a program unenrolls a child due to chronic absenteeism, OHS encourages programs to allow the family to re-enroll upon return if there is a vacancy to accommodate them. If a program can no longer accommodate the family, it should place the child to the waitlist and help them identify an alternative care arrangement.

Enrollment Reporting Reminders

All Head Start programs must report their monthly enrollment in the Head Start Enterprise System (HSES) by Head Start Preschool and/or Early Head Start program within each grant ([641A\(h\)\(2\)](#)). Together, the following categories make up the total enrolled slots for the month: filled slots, reserved slots, and slots vacant for less than 30 days. Programs can make edits to reported monthly enrollment until a new reporting period opens.

For the purposes of enrollment reporting, a slot that is vacant for less than 30 days is counted toward a program's enrolled slots. Programs may report any slots that were vacant for less than 30 days as enrolled for the month. This allows the programs an opportunity to enroll another family. After 30 days, the slots can no longer be counted as enrolled slots (§1302.15(a)). At the beginning of the program year, all unfilled slots are considered vacant, unless they are reserved, and must be filled as soon as possible.

Importance of Attendance and Preventing Chronic Absenteeism

In Head Start programs, chronic absenteeism means missing 10 percent of program days per year. Chronic absenteeism, even among children in preschool and kindergarten, has been shown to be related to future chronic absenteeism, grade retention, and poor academic achievement.¹

Children living in poverty are two to three times more likely to be chronically absent from school. Chronic absenteeism can have disproportionately negative impacts on children living in poverty because their families often lack access to resources needed to make up for the lost learning.² Establishing a pattern of consistent attendance enhances children's cognitive development, social skills, and long-term educational success.

Strategies to Enhance Program Access and Participation for Children and Families

Head Start programs are required to implement strategies to promote attendance (§1302.16(a)(2)). Here are a few strategies programs can use to address chronic absenteeism and boost regular attendance:

- Building relationships with families to improve communication.
 - Program leadership should promote regular attendance by consistently sending the message that regular attendance is important for children's success. Child and family services staff should reinforce this message by highlighting attendance during parent-teacher conferences and other engagement opportunities, and discussing the benefits of regular attendance with families.
 - Programs should ensure that all staff can build trusting relationships with families. These relationships are the foundation for understanding any challenges a family and child may be facing. As part of these ongoing relationships, staff can have regular conversations with families about the value and benefits of attendance as well as problem solve about specific family circumstances that may be adversely affecting child attendance.
- Programs can engage in community partnerships that support child and family wellbeing and promote child attendance. Health and mental health providers, family support services, housing

organizations, and child care providers with extended days supports can all help programs to promote family and child wellness, stability, and child attendance.

- Programs must track attendance for every child. Programs must also examine barriers to regular attendance, such as access to safe and reliable transportation, and where possible, provide or facilitate transportation for the child if needed (§1302.16(a)(2)(v)).
- Programs must regularly review and analyze individual child-attendance data to identify trends and patterns in absences and develop targeted supports for families. If a program's monthly average daily attendance rate falls below 85 percent, the program must analyze the causes of absenteeism to identify any systematic issues that contribute to the program's absentee rate (§1302.16(b)).
- Programs should use health data to identify trends in children's absences that are related to health and implement strategies that improve attendance. They can help improve attendance using policies and procedures that promote health, reduce the spread of illness, and prevent injury. Programs should individualize supports for each family when absences are related to health, and provide education and resources for family members to prevent illness and injury and identify when a child is sick and needs treatment.
- Programs must use a multidisciplinary approach that facilitates coordination and collaboration between mental health and other relevant program services, including as education, disability, family engagement, and health services. A multidisciplinary approach, including mental health consultants, can help programs identify why there may be chronic absenteeism and support children and families to attain regular attendance.

Thank you for the work you do on behalf of children and families.

Sincerely,

/ Tala Q. Hooban /

Tala Q. Hooban
CAPT, U.S. Public Health Service
Acting Director
Office of Head Start
Resources:

- [ERSEA \[Eligibility, Recruitment, Selection, Enrollment and Attendance\] Insights](#)
- [Addressing Barriers that Limit Attendance](#)
- [Health Services to Promote Attendance](#)
- [Eligibility Resources](#)
- [Enrollment: Creating Systems for Filling Every Seat](#)
- [Making Enrollment Accessible to Families](#)

¹ <https://www.aap.org/en/patient-care/school-health/school-attendance>

² <https://www.attendanceworks.org/chronic-absence/the-problem/>

August 2025 HEAD START TIME & ATTENDANCE REPORT

As of 8/31/25	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		10	10			0	10	0		10	1	19	89.1%
Boswell 1		11	11			0	11	0		11	4	12	92.3%
Boswell 2		11	11			0	11	0		11	7	12	95.0%
Broken Bow		11	11			0	11	0		11	1	12	95.2%
Forest Grove 1		11	11			0	11	0		11	4	12	95.5%
Forest Grove 2		13	13			0	13	0		13	8	12	90.8%
Fort Towson		10	10			0	10	0		10	5	15	92.2%
Horace Mann 1		10	10			0	10	0		10	3	16	94.2%
Horace Mann 2		17	17		1	1	16	1	8/20/2025	17	2	16	93.7%
Horace Mann 3		11	11			0	11	0		11		16	98.8%
Hugo 2		12	12			0	12	0		12	1	16	86.6%
Hugo 4		11	11			0	11	0		11	1	16	93.5%
Idabel 1		4	4			0	4	0		4	1	12	97.7%
Idabel 2		12	12		1	1	11	1	8/29/2025	12		12	92.7%
Idabel 3		8	8			0	8	0		8		12	93.6%
Rattan		11	11		2	2	9	2	8/18/2025	11	3	16	94.9%
Soper 1		7	7			0	7	0		7	4	13	92.3%
Soper 2		16	16			0	16	0		16	8	13	96.6%
TOTALS	0	196	196	0	4	4	192	4		196	53		93.5%

August 2025 Pre-K TIME & ATTENDANCE REPORT

As of 8/31/25	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		4	4			0	4	13	90.4%
TOTALS	0	4	4	0	0	0	4		90.4%

August 2025 EHS Time and Attendance												
As of 8/31/25	ENROLLED			DROPPED								ATTENDANCE
CENTER	Previously Enrolled	Monthly Enrolled	YTD Enrolled	Previously Dropped	Monthly Drop	YTD Drop	Currently Enrolled	AI	30 Day Count	Date Dropped	Kid Days	Monthly ADA
Antlers		24	24			0	24	2	0		21	93.3%
Hugo		14	14		2	2	12	1	2	8/11/2025	20	78.2%
Idabel		13	13		5	5	8	1	5	8/15/2025	21	89.2%
TOTALS	0	51	51	0	7	7	44	4	7			88.8%

August 2025 EHS-CC Time and Attendance												
As of 8/31/25	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		8	8			0	8	1	0		21	95.8%
ELC-Broken Bow		10	10		2	2	8		2	8/13/2025	21	89.4%
ELC-Hugo		10	10		2	2	8		2	8/8/2025	20	87.7%
ELC-Idabel		17	17		6	6	11	1	6	8/15/2025	21	78.9%
Cabbage Patch		33	33		9	9	24	3	9	8/9/2025	21	96.7%
The LearningTree		45	45		9	9	36	5	9	8/19/2025	21	86.7%
TOTALS	0	123	123	0	28	28	95	10	28			89.0%

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.

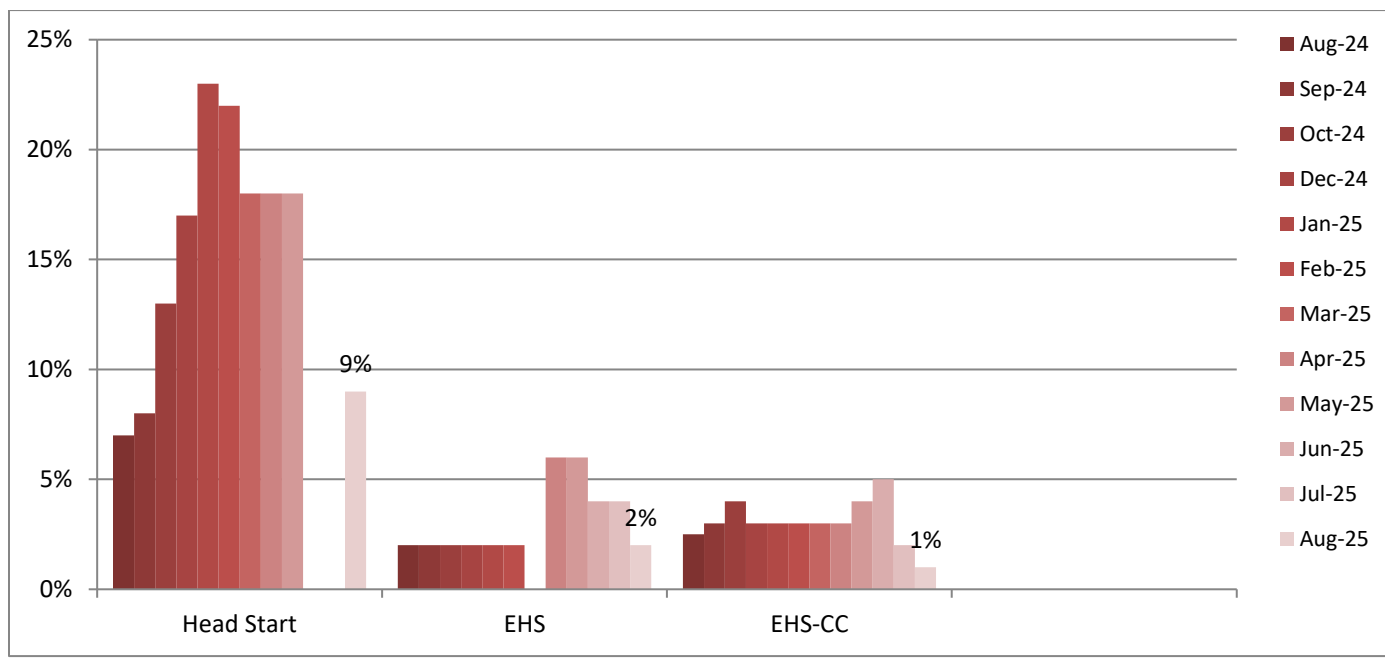
Month	Breakfast	Lunch	Snack	Monthly Total
September-24	2981	2967	3874	9822
October-24	3074	3043	3757	9874
November-24	2277	2261	2827	7365
December-24	2296	2270	2796	7362
January-25	2207	2195	2809	7211
February-25	2307	2293	2928	7528
March-25	2182	2185	2943	7310
April-25	2590	2797	3804	9191
May-25	1749	1730	1877	5356
June-25	558	577	522	1657
July-25	758	806	741	2305
August-25	2277	2317	2738	7332
September-25	2937	3003	3570	9510
YEARLY TOTALS	28193	28444	35186	91823

Data Analysis Report Summary

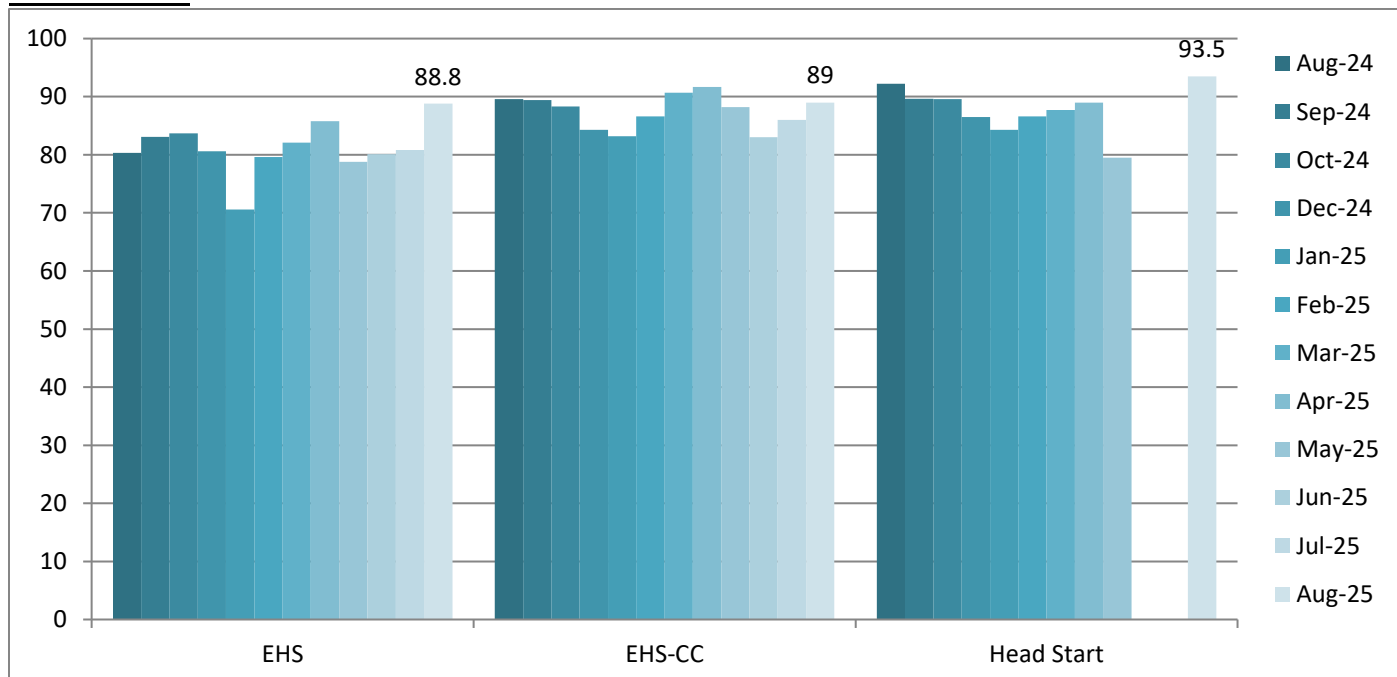
August 2025

Disabilities

IEP/IFSP –

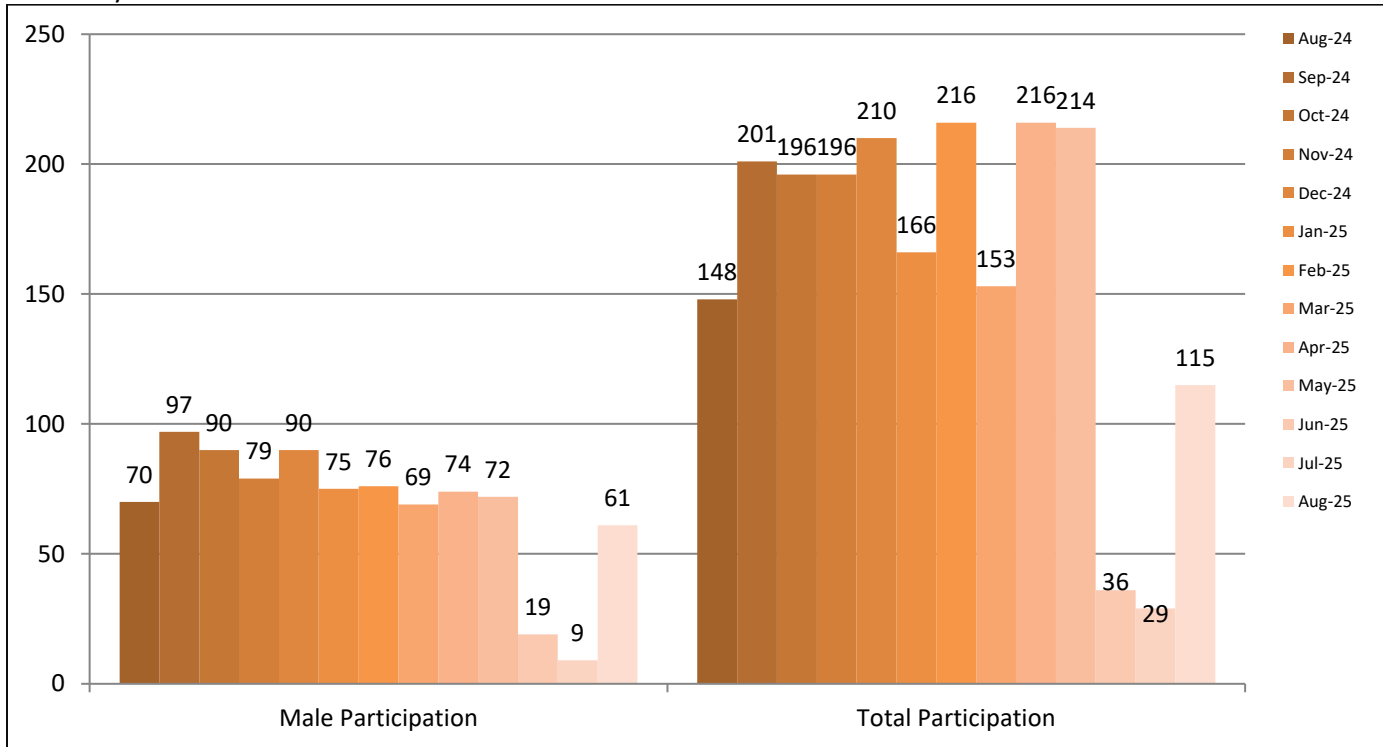


Attendance

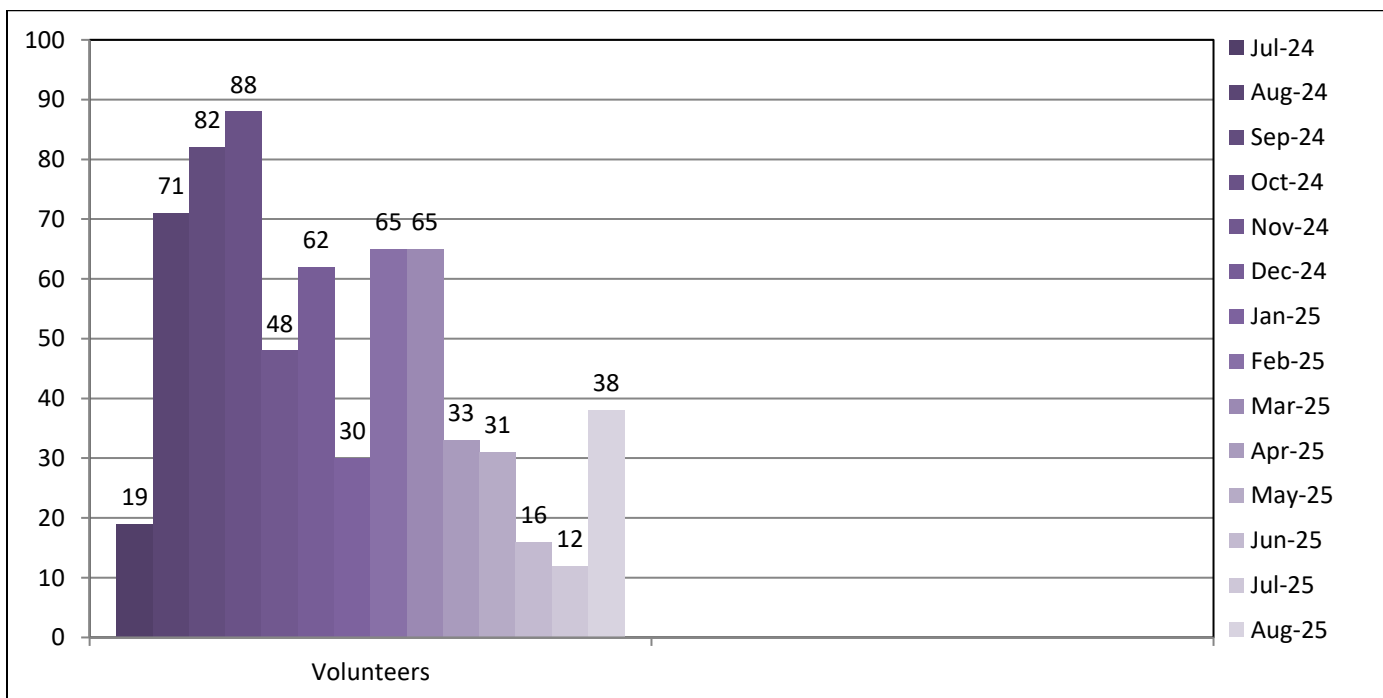


Family & Community Engagement

Dad's Day



Parents Ready to Read



Head Start is a federal program that includes **Head Start Preschool**, which serves children ages 3 to 5, and **Early Head Start**, which supports infants, toddlers under age three, pregnant women, and their families. Both programs provide comprehensive, high-quality services that support early learning, health, nutrition, and family well-being. Children are eligible if their family income is below the federal poverty line (\$32,150 for a family of four), they are in foster care, or they are experiencing homelessness.

Head Start reflects the needs of each community it serves. Federal funds go directly to local grantees who operate programs in rural, urban, and suburban communities in a variety of settings, including centers, family child care, churches, and schools. Each program relies on input from parents and community members to ensure services are tailored and effective. This flexibility also allows programs to draw on other local, state, and federal funding to maximize their reach and impact.

Oklahoma received **\$196,157,876** for Head Start and Early Head Start in FY2024¹ offering services at **356 program sites**.²

Head Start's impact extends beyond the program itself. Many state and local early learning systems are built around Head Start, relying on these grants, paired with other funding sources, to serve children from a variety of backgrounds. In this way, Head Start has become inextricable from child care and preschool programs in cities and states nationwide.

ENROLLMENT AT-A-GLANCE

Children Enrolled³

Early Head Start: 4,796
Head Start Preschool: 10,050
Total: 14,846

Foster Care⁴

Early Head Start: 315
Head Start Preschool: 413
Total: 728

Experiencing Homelessness⁵

Early Head Start: 430
Head Start Preschool: 588
Total: 1,018

IDEA* services for developmental delays and special education⁶

Early Head Start: 424
Head Start Preschool: 1,232
Total: 1,656

*The [Individuals with Disabilities Education Act](#) (IDEA) provides early intervention services to infants and toddlers who have developmental delays and special education services to preschool aged children. With its robust developmental screenings and requirement to reserve at least 10% of enrollment for children with disabilities, Head Start plays a crucial role in helping children and families access IDEA services.



Head Start provides **early learning, health, nutrition, and family well-being services** for young children.



HEAD START'S IMPACT ON CHILDREN AND FAMILIES

Head Start touches many aspects of children's development and well-being. While enrolled in Head Start, children receive high-quality early learning and care that encourages learning through play and physical activity. Programs also provide healthy meals and snacks, as well as medical, dental, hearing, vision, and behavioral health screenings.

Families are engaged as essential partners in their child's success, and Head Start's wrap-around services remove logistical hurdles allowing parents to earn a living or finish their education. This is particularly true in rural communities, where a lack of child care options, transportation, and other factors often create additional barriers for parents.

Of the families served in **Oklahoma**, **10,373** have one or more parents employed, in school, or in job training.⁷

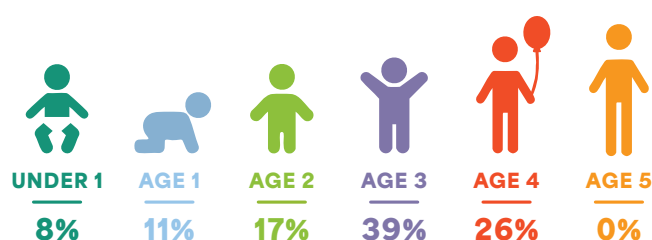
 As a result, **Head Start alumni** are more likely to be **kindergarten ready**, **graduate from high school**, and secure **stable jobs**.⁸

Head Start families are also more **engaged in their children's learning**⁹ and are more likely to **advance their own education**.¹⁰

BREAKDOWN OF PROVIDER TYPES IN OKLAHOMA¹¹

	HEAD START PRESCHOOL	EARLY HEAD START
CENTER-BASED	100%	93%
HOME-BASED	0%	5%
FAMILY CHILD CARE	0%	2%
LOCALLY DESIGNED	0%	0%

PROGRAM ENROLLMENT BY AGE IN OKLAHOMA¹²



HEAD START'S IMPACT ON COMMUNITIES

Head Start has a positive impact on the communities where it operates. In addition to employing Head Start staff, programs partner with local businesses and schools for everything from purchasing food and supplies to supporting the transition to kindergarten.

In Oklahoma, Head Start programs:

- Employ **1,651 teachers**, **family child care providers**, and **home visitors**.¹³
- Have **441 partnerships** to serve children with disabilities¹⁴ and
- **333 partnerships** to support the transition to kindergarten.¹⁵

UNMET NEED

Even with the many local, state, and federal partnerships, there are not enough slots to serve all the children who qualify. In Oklahoma, only **14% of Early Head Start** eligible children and **30% of Head Start Preschool** eligible children are currently being served.¹⁶



Scan or click the QR code for full references and links.

For more information visit [FFYF's interactive Head Start maps](#) or contact FFYF at mail@ffyf.org.



Domestic Violence in OKLAHOMA

WHAT IS DOMESTIC VIOLENCE?

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

DOMESTIC VIOLENCE IN OKLAHOMA

- 40.1% of Oklahoma women¹ and 37.8% of Oklahoma men² experience intimate partner physical violence, intimate partner rape and/or intimate partner stalking in their lifetimes.
- In 2019, 37 individuals were victims of intimate partner homicide in Oklahoma. Eighty-one percent of these deaths involved a firearm.³
- On a single day in 2020, Oklahoma the domestic violence programs reported serving 948 adult and child victims of domestic violence. During this same 24-hour period, 203 Hotline calls were received, averaging 9 contacts per hour. Fifty-eight requests for services were unmet due to lack of resources.⁴
- Oklahoma is ranked 3rd in the nation for women killed by men in single victim-single offender, homicides.⁵
- In Tulsa alone, the Tulsa police department responded to 5,044 domestic violence calls for service in 2017.⁶ Many other incidents went unreported.
- As of December 31, 2020, Oklahoma had submitted 97 misdemeanor domestic violence conviction records and one protective order record to the NICS Index.⁷

DID YOU KNOW?

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

DOMESTIC VIOLENCE-RELATED FIREARMS LAWS IN OKLAHOMA

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

If you are in crisis, contact The National Domestic Violence Hotline at **1-800-799-SAFE (7233)** or www.TheHotline.org.

Please visit the **National Coalition Against Domestic Violence's** website at www.ncadv.org for more fact sheets, membership information and valuable resources.



Domestic Violence in OKLAHOMA

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

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

¹ Smith, S. G., Chen, J., Basile, K. C., Gilbert, L. K., Merrick, M. T., Patel, N., Walling, M., & Jain, A. (2017). *The national intimate partner and sexual violence survey (NISVS): 2010-2012 state report*. National Center for Injury Prevention and Control, Centers for Disease Control and Prevention. <https://www.cdc.gov/violenceprevention/pdf/NISVS-StateReportBook.pdf>

² Ibid.
³ Oklahoma Domestic Violence Fatality Review Board. (2020). *An analysis of 2019 domestic violence homicides: Report year 2020*. https://www.oag.ok.gov/sites/g/files/gmc766/ff/2020_dvfrb_annual_report_official.pdf

⁴ National Network to End Domestic Violence. (2020). 15th annual domestic violence counts report - Oklahoma summary. <https://nnedv.org/resources-library/15th-annual-domestic-violence-counts-report-oklahoma-summary/>

⁵ Violence Policy Center. (2020). *When men murder women. An analysis of 2018 homicide data*. <https://vpc.org/studies/wmmw2020.pdf>

⁶ Isaza, G. T., Engle, R. S., Corsaro, N., Ozer, M. M. (2019). *Understanding domestic violence patterns: A problem analysis conducted for the Tulsa, Oklahoma police department*. International Association of Chiefs of Police/University of Cincinnati Center for Police Research and Policy. https://www.theiacp.org/sites/default/files/2020-09/Report%20-%20Tulsa_%20Domestic%20Violence%20Problem%20Analysis_FINAL%20%281%29.pdf

⁷ FBI Criminal Justice Information Services (CJIS) Division: National Instant Criminal Background Check System (NICS) Section (2021). *Active records in the NICS Index as of December 31, 2020*. <https://www.fbi.gov/file-repository/active-records-in-the-nics-indices-by-state.pdf/view>

⁸ Black, M.C., Basile, K.C., Breiding, M.J., Smith, S.G., Walters, M.L., Merrick, M.T., Chen, J., & Stevens, M. (2011). *The national intimate partner and sexual violence survey: 2010 summary report*. Centers for Disease Control and Prevention, National Center for Injury Prevention and Control, Division of Violence prevention. http://www.cdc.gov/violenceprevention/pdf/nisvs_report2010-a.pdf

⁹ National Network to End Domestic Violence. (2021). *15th annual domestic violence counts report*. <https://nnedv.org/wp-content/uploads/2021/05/15th-Annual-DV-Counts-Report-Full-Report.pdf>

¹⁰ Morgan, R.E., & Oudekerk, B.A. (2019). *Criminal victimization, 2018*. Bureau of Justice Statistics. <https://www.bjs.gov/content/pub/pdf/cv18.pdf>

¹¹ Spencer, C. M. & Stith, S. M. (2020). Risk factors for male perpetration and female victimization of intimate partner homicide: A meta-analysis. *Trauma, Violence, & Abuse*, 21(3), 527-540. doi: 10.1177/1524838018781101

¹² Campbell, J.C., Webster, D., Koziol-McLain, J., Block, C., Campbell, D., Curry, M. A., Gary, F., Glass, N., McFarlane, J., Sachs, C., Sharps, P., Ulrich, Y., Wilt, S., Manganello, J., Xu, X., Schollenberger, J., Frye, V., & Lauphon, K. (2003). Risk factors for femicide in abusive relationships: Results from a multisite case control study. *American Journal of Public Health*, 93(7), 1089-1097.

¹³ Violence Policy Center (2018). *American roulette: murder-suicide in the United States*. Washington, DC. Retrieved from <https://vpc.org/studies/amroul2018.pdf>.

¹⁴ Okla. Stat. tit. 22, § 22-60.11(5)

¹⁵ Okla. Stat. tit. 22, § 22-60.3(A); Okla. Stat. tit. 22, § 22-60.4(C)(1)

¹⁶ Okla. Stat. tit. 22, § 22-60.1(1)

¹⁷ Okla. Stat. tit. 22, § 22-60.8(A)

If you are in crisis, contact The National Domestic Violence Hotline at 1-800-799-SAFE (7233) or www.TheHotline.org.

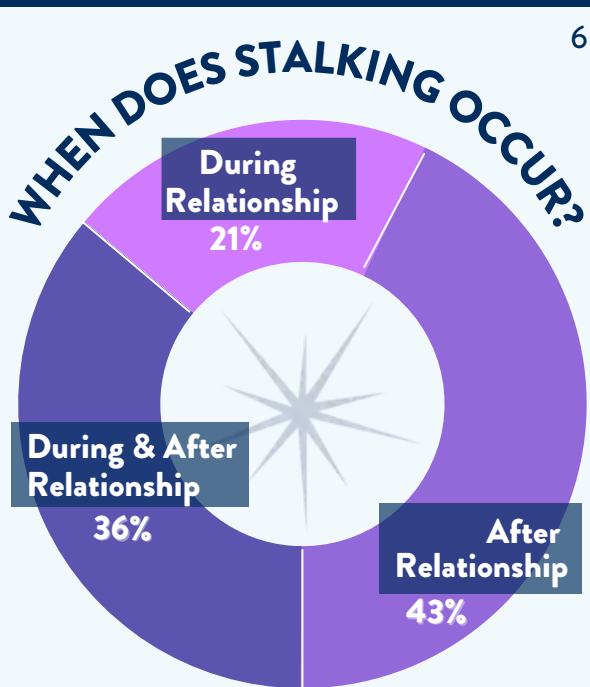
Please visit the **National Coalition Against Domestic Violence's** website at www.ncadv.org for more fact sheets, membership information and valuable resources.

STALKING & DOMESTIC VIOLENCE

All stalkers can be dangerous. On average, intimate partner stalkers pose the greatest threats to their victims.

85% of attempted
76% of completed
INTIMATE PARTNER FEMICIDES
were preceded by **stalking** in the prior year¹

2 YEARS
is the average duration of intimate partner stalking.²



Stalking can occur before, during, and/or after a relationship.

Citations

- 1 McFarlane, J., Campbell, J.C., Wilt, S., Ulrich, Y., & Xu, X. (1999). Stalking and Intimate Partner Femicide. *Homicide Studies* 3 (4), 300-316.
- 2 Brewster, M. (2003). Power and control dynamics in pre-stalking and stalking situations. *Journal of Family Violence*, 18, 4, 207-217.
- 3 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.
- 4 Sheridan, L. & Davies, G.M. (2006). Violence and the Prior Victim-Stalker Relationship. *Criminal Behaviour and Mental Health* 11(2): 102-116.
- 5 Leemis, R.W., Friar, N., Khatiwada, S., Chem, M.S., Kresnow, M., Smith, S.G., Caslin, S., & Basile, K.C. (2022). *The National Intimate Partner and Sexual Violence Survey (NISVS): 2016/2017 Report on Intimate Partner, Violence*. Atlanta, GA: National Center for Injury Prevention and Control, Centers for Disease Control and Prevention.
- 6 Tjaden, P. & Thoennes, N. (1998). *Stalking in America: Findings from the National Violence Against Women Survey (NCJ#169592)*. Washington, DC: National Institute of Justice Centers for Disease Control and Prevention.

43% of female
32% of male
STALKING VICTIMS ARE TARGETED by (current or former) **INTIMATE PARTNERS**³

Victims of intimate partner stalking have



MORE SEPARATION ATTEMPTS

than victims of intimate partner violence alone.⁴

BOTH STALKING³ & INTIMATE PARTNER VIOLENCE⁵ ARE PREVALENT


1 in 3 women


2 in 5 women


1 in 6 men


1 in 4 men

experience stalking in their lifetimes

are impacted by intimate partner violence in their lifetimes
(stalking, sexual, and/or physical violence)



DON'T BE IN THE DARK SHINE A LIGHT ON DOMESTIC VIOLENCE

THURSDAY, OCTOBER 16, 2025 | 7:00 PM

CHOCTAW NATION WELLNESS CENTER POND | HUGO, OK

Join the Choctaw Nation and Lift for an evening glow walk and candlelight vigil to bring awareness to violence in the home and honor its victims.

FOR MORE INFORMATION ON FAMILY VIOLENCE PREVENTION PROGRAM, VISIT
[BIT.LY/CNO-FAMILY-VIOLENCE-PREVENTION](https://bit.ly/cno-family-violence-prevention)

FOR MORE INFORMATION ON LIFT VICTIM ADVOCACY SERVICES AND SAFE
PLACE HEALING HEARTS, VISIT **[WWW.LIFTCA.ORG](http://www.liftca.org)**



Choctaw Nation of Oklahoma

