LIFT

Community Action Agency, Inc.

Board of Directors Meeting

DECEMBER 9, 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, December 9, 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. Recognition of Kevin Cory as Elected Representative for the Choctaw County Emergency Food and Shelter Board, a Low-Income Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2028*)

D. Recognition of David Hawkins as Elected Representative for Idabel Nutrition Center, a Low-Income Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2028*)

E. Consideration and Possible Action to Accept Brad Burgett as Appointed Representative for the Pushmataha County Board of Commissioners, a Public Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2028*)

F. Consideration and Possible Action to Accept Brent Franks as Appointed Representative for the Pushmataha County Ministerial Alliance, a Private Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2028*)

G. Consideration and Possible Action to Accept Lori Greer as Appointed Representative for the Hugo Area Chamber of Commerce, a Private Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2028*)

H. Consideration and Possible Action to Accept Jia Johnson as Appointed Representative for the Idabel Chamber of Commerce and Agriculture, a Private Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2028*)

I. Consideration and Possible Action to Accept David Smith as Appointed Representative for the City of Antlers, a Public Entity on LIFT CAA Board of Directors (*Entity to Expire 12/31/2028*)

J. Consideration and Possible Action to Accept Craig Young as Appointed Representative for the City of Idabel, a Public Entity on the LIFT CAA Board of Directors (*Entity to Expire 12/31/2028*)

K. Finance/Audit/Loan Committee Report

Consent Docket - *The following items of business indicated by brackets (L and M, N, O) 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.*

L. Vote to Approve October 2025 Regular Meeting Minutes (*Organizational Standard 5.5*)

M. Vote to Approve September 2025 and October 2025 Financial Reports; Distribution of November 2025 Financials for January 2026 Consideration and Vote (*OS 8.7*)

N. Vote to Approve Submission of Resolutions/Grant Applications – **$2,057,053**
1. Child Care Stabilization Grant Program Application (Year 5, Early Learning Centers) to Choctaw Nation of Oklahoma, Child Care Assistance Program - ***$72,000***
2. PY 2025 Department of Energy Weatherization Assistance Program Application to Oklahoma Department of Commerce/Community Development - ***$517,953***
3. Transportation Services Contract Bid to Oklahoma Office of Management and Enterprise Services, Central Purchasing Division
4. FY 2026 Flexible Impact Grant Application to NeighborWorks® America - ***$260,000***
5. FY 2026 Retired and Senior Volunteer Program Grant Application (Continuation) to AmeriCorps - ***$107,100***
6. FY 2026 Healthy Start Initiative: Eliminating Disparities in Perinatal Health Grant Application (Continuation, Year 13) to Health Resources and Services Administration - ***$1,100,000***

O. Vote to Approve Acceptance of Grants/Contracts/Awards – **$8,185,887.54**
1. Child Care Stabilization Grant Program Awards (Year 5/Quarter 1, Early Learning Centers) from Choctaw Nation of Oklahoma - ***$18,000***
2. Choosing Childbirth Act Award (Year 2) from Oklahoma State Dept. of Health - ***$800,000***
3. Child and Adult Care Food Program Grant Award from Oklahoma Department of Education - ***$2,222,403.54*** (*Head Start/Early Head Start – up to $721,000; Early Learning Centers – up to $128,890.17; CACFP – up to $1,372,513.37*)
4. PY 2025 Department of Energy Weatherization Assistance Program Award from Oklahoma Department of Commerce - ***$517,953***
5. FY 2026 Head Start/Early Head Start Program Grant Award (Continuation) from Administration for Children and Families, Office of Head Start - ***$4,614,531***
6. FY 2025 NeighborWorks Financial Capability Capacity Building Cohort Award (2nd Allocation) from NeighborWorks® America - ***$13,000*** *(Total Awarded $20,000)*

P. Consideration and Possible Action to Approve Whistleblower Policy (*OS 7.7*)

Q. Consideration and Possible Action to Approve Updates to LIFT Transit Americans with Disabilities Act Policy

R. Consideration and Possible Action to Approve Updates to Financial Services Manual (*OS 8.10*)

S. Consideration and Possible Action to Approve 2026 Agency-Wide Budget (*OS 8.9*)

T. Consideration and Possible Action to Remove Dawn McDaniel as an Authorized Check Signer for LIFT Community Action Agency, Inc.

U. Consideration and Possible Action to Approve Rhonda Teague as an Authorized Check Signer for LIFT Community Action Agency, Inc.

V. Consideration and Possible Action to Approve Closing of Account at Shamrock Bank

W. Consideration and Possible Action to Approve 2026-2028 Strategic Plan (*OS 4.3, 6.1-6.4*)

X. Consideration and Possible Action to Approve LIFT CAA to Act as Fiscal Agent for the Choctaw County Freestanding Multidisciplinary Team and Contract with Oklahoma Commission on Children and Youth (*$34,622.59 Maximum Contract Total, Period: 1/1/2026–12/31/2026*)

Y. Consideration and Possible Action to Approve LIFT CAA to Act as Fiscal Agent for the Pushmataha County Freestanding Multidisciplinary Team and Contract with Oklahoma Comm. on Children and Youth (*$34,622.59 Maximum Contract Total, Period: 1/1/2026–12/31/2026*)

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

AA. Consideration and Possible Action to Approve Victim Services Programs Philosophy of Service Provision, Annual Program Goals, Code of Professional Ethics, and Annual Evaluation (*OS 5.7*)

BB. Board Training/Programmatic Report: Update on ROMA Process, 2025 Community Action Plan with Logic Models/Results & 2023-25 Strategic Plan: Agency Program/Performance Evaluation, Success of Specific Strategies, Progress on Meeting Goals (*OS 4.2, 4.3, 4.4, 5.7, 5.9 & 6.5*)

CC. Report on Agency-Wide Comprehensive Risk Assessment (*OS 4.6*)

DD. Board Training/Programmatic Report: Quarterly (July–September) and Year-to-Date Housing Production as Reported to NeighborWorks® America (*OS 5.7 & 5.9*)

EE. Board Training: Civil Rights Training for Grantees (*OS 5.7*)

FF. Board Training/Programmatic Report: Head Start Programs Child Outcomes/Assessment Results for Fall 2025-2026 (*OS 5.7 & 5.9*)

GG. Transportation Advisory Council Report (*OS 5.9*)

HH. Program Spotlight: LIFT Transit & PICK Transportation Service (*OS 5.9*)

II. 2025 Board Giving Report (*OS 5.7*)

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

KK. Recognition of November 2025 Employee of the Month:
Dawn McKee, Intake Specialist – Weatherization Program

LL. Recognition of December 2025 Employee of the Month:
Jessica Watts, Behavioral Health Case Manager – RENEW Center &
Family/Youth/Community Advocate – Better Choices : Better Futures Program

MM. Recognition of 2025 Employee of the Year:
Ashley Gaddy, Outreach Specialist – Head Start Programs & Family Resource Center

NN. Recognition of Service Awards
Five Years: Dionne Frankum, Director – Better Choices : Better Futures, Connection Café, RENEW Outpatient Treatment Center, Second Chance Reentry Program, Tri-County Abatement Collaborative, Youth Empowerment Network
Ten Years: Tasha Clark, Teacher – Head Start Program
Michelle Hunt, Center Director – Early Head Start Program
Twenty-Five Years: Lisa Engler, Cook – Head Start Programs

OO. Other Reports/Announcements/Correspondence: Head Start Programs Monthly Reports (Program Summary, Communication and Guidance, Enrollment/Attendance, Meals/Snack, Data Analysis); Red Kettle Campaign Volunteer Sign-up; Emergency Services Fundraiser (*OS 5.9*)

PP. 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*)

QQ. Vote to Adjourn

Posted: ____________________________ *Date:* __________________ *Time:* __________

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

MINUTES
BOARD OF DIRECTORS MEETING
October 14, 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, October 14, 2025 at 10:07 a.m. The meeting was held at LIFT CAA's Head Start Administration Office, located at 1005 S. 5th Street in Hugo, Oklahoma. The notice of time, place, and an agenda for the meeting were posted 24 hours prior within prominent view at the main office (209 N. 4th St., Hugo, Oklahoma) and the meeting site (1005 S. 5th St., Hugo, Oklahoma) as well as online at https://liftca.org/board/.

In the absence of the Chairman and Vice-Chairman, Brent Franks, a Board Member and former Chairman, called the meeting to order and presided over the proceedings.

The Invocation was given by Board Member Colby Bryant.

Roll Call was taken, and a quorum was established (13 Board Members present, 10 absent). The following Board Members were present at the meeting site: Colby Bryant, Brent Franks, Brad Gernand, Kristi Graham, Lori Greer, David Hawkins, Sharon Johnson, Vickie Leathers, Sandra Meeks, David Smith, Consuelo Splawn, Vicky Wade, Debra Williams. The following members were absent: Tami Barnes, Brad Burgett, Kevin Cory, Andrea Henkel, Jordan Hill, Jia Johnson, Carolyn Pool, William Smith, Jim Bob Sullivan, and Craig Young. LIFT CAA employees and visitors present at the meeting site were: Kinsey Cox, Amber Duncan, Rhonda Teague, Kathy James, Macy Self, Sheree Ensley, Jeannie McMillin, John Freelove, Jordan Mack, Mattie McKee, Rebecca (Reynolds) Porter, Amanda Perry, and Amy Craven.

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

Sheree Ensley, Fiscal Officer, provided the Board with the Finance/Audit/Loan Committee Report. The Committee met on October 14, 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 August 2025. The Committee was presented with the September 2025 Financial Reports.

CONSENT DOCKET ITEMS

CONSIDER APPROVAL OF MEETING MINUTES/FINANCIAL REPORTS

Brent Franks, Board Member, requested the Board's vote to approve the September 2025 Regular Meeting Minutes and the August 2025 Financial Reports; the September 2025 Financials were distributed for consideration and vote at the December 2025 Board Meeting (Organizational Standards 5.5 and 8.7). A motion was made by Vicky Wade and seconded by Debra Williams to approve the September 2025 Regular Meeting Minutes and August 2025 Financial Reports. The roll call vote was as follows: Yes 11; No 0; Abstain 2. The motion carried. The Voting Record is attached (Items D & E).

CONSIDER SUBMISSION OF RESOLUTIONS/GRANT APPLICATIONS

Brent Franks, Board Member, requested the Board's vote to approve agency submission of Resolutions and Grant Applications, as follows:

1. 2025 Hometown Grant Application to T-Mobile in the amount of $50,000; if awarded, these funds will be used to create a playground and family recreation space at Hugo Lake, transforming an underutilized area into a vibrant hub for play, connection, and wellness. Funding 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.
2. FY 2025 Rural Advisory Council Travel Request to NeighborWorks® America in the amount of $2,000; if awarded, these funds will be used to cover the costs to attend the FY 2025 Rural Advisory Council In-Person Meeting.

After discussion and Board Member input with regards to the applications presented, a motion was made by Colby Bryant and seconded by David Smith to approve the submission of resolutions and/or grant applications in the amount of $52,000 presented as listed on the Consent Docket. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item F).

CONSIDER ACCEPTANCE OF GRANTS/CONTRACTS/AWARDS

Brent Franks, Board Member, requested the Board's vote to approve agency acceptance of Grants, Contracts, and Awards, as follows:

1. FY 2026 Base Grant Award from Oklahoma Court Appointed Special Advocates (CASA) Association in the amount of $30,680.97; these funds will be used over the program year to support staff salaries as well as associated operating expenses.
2. Strategies to Reduce Food Insecurity Pilot Project Contract Award from Oklahoma State Department of Health in the amount of $20,000; this comprehensive pilot project operated as part of the LIFT CAA Family Resource Center will work to alleviate immediate food insecurity and promote long-term nutritional well-being for families with children under age 12. This will be accomplished through a coordinated suite of services—including a Weekend Backpack Food Program, quarterly Family Cooking and Nutrition Classes, Mobile Food Market events, and onsite food access at the Family Resource Center—which will expand food access, build nutrition knowledge and skills, and strengthen family resilience to help meet the overall goal of reducing food insecurity among young children.
3. FY 2026 State Domestic Violence/Sexual Assault Services Funding Contract Award from Oklahoma Office of Attorney General in the amount of $227,245; these funds will be used over a one-year period to provide supportive services to adult victims of domestic violence and/or sexual assault, as well as children exposed to family violence, domestic violence or dating violence. Supportive services could include crisis intervention, safety planning, individual counseling, peer counseling, educational services, legal advocacy, personal advocacy, housing advocacy, medical advocacy, information/referral, and transportation.

4. Community Event Grant Award from Potts Family Foundation in the amount of $638.40; 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.
5. Local Giving Award (Holiday Food Baskets) from International Paper, Valliant Mill in the amount of $2,000; this funding will be used to provide food baskets to needy families in the tri-county service area during the 2025 holiday season.
6. FY 2025 Flexible Impact Grant Award (3rd & 4th Allocations) from NeighborWorks® America in the amount of $132,000; funding under the Expendable category will be used to support Housing Department staff and other operational expenses associated with the agency's housing and lending lines of business. In addition, funding under the Capital category will be used to make improvements at LIFT CAA's multi-family properties and/or increase homeownership opportunities via the residential lending line of business. The total amount awarded for FY 2025 is $284,000.
7. FY 2025 Rural Advisory Council Travel Stipend from NeighborWorks® America in the amount of $2,000; these funds will be used to cover the costs to attend the FY 2025 Rural Advisory Council In-Person Meeting.
8. Rx for Oklahoma Award (3rd Allocation) from KI BOIS Community Action Foundation, Inc. in the amount of $4,887.16; these funds will be used to assist eligible individuals in accessing medication cost assistance programs provided by pharmaceutical companies. The total amount awarded for FY 2025 is $18,447.48.
9. Preschool Development Grant Birth Through Five Parent and Family Engagement Award from Oklahoma Partnership for School Readiness Foundation, Inc. in the amount of $52,500; with this funding, 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.

A motion was made by David Smith and seconded by Debra Williams to approve acceptance of grants, contracts, and awards in the amount of $471,951.53 as presented and listed on the Consent Docket. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item G).

Brent Franks, Board Member, requested the Board's consideration and possible action to enter into Executive Session to review and discuss the following items in accordance with Oklahoma Statute Title 25 § 307(B)(1): 1.) Executive and Personnel Committee's Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director (Organizational Standard 7.4) and 2.) Employment Contract Renewal and Compensation of Rebecca (Reynolds) Porter as Executive Director of LIFT CAA (Organizational Standard 7.5). A motion was made by David Hawkins and seconded by Lori Greer to enter into Executive Session to review and discuss the Executive and Personnel Committee's Performance Evaluation, Employment Contract Renewal, and Compensation of Rebecca (Reynolds) Porter as Executive Director of LIFT CAA. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item H). LIFT CAA staff/visitors then exited the room; the Board of Directors entered into Executive Session at 10:18 a.m.

After holding Executive Session, LIFT CAA staff/visitors were brought back into the meeting room. Brent Franks, Board Member, then requested the Board's consideration and possible action to adjourn out of Executive Session and the regular Board Meeting be reconvened. A motion was made by David Smith and seconded by Colby Bryant to adjourn out of Executive Session and the regular Board Meeting be reconvened. The Roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item I). The Board of Directors adjourned out of Executive Session at 10:46 a.m.

Brent Franks, Board Member, requested the Board's consideration and possible action to approve the Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director. In accordance with Organizational Standards – Category 7, Standard 7.4, the Governing Board conducts a performance appraisal of the Executive Director each calendar year. The Executive and Personnel Committee conduct the Performance Evaluation with the Executive Director present, then reports back to the Board on its findings. The Board reviews the Performance Evaluation, meets with the Executive Director if deemed necessary, and votes whether to approve the Evaluation. During Executive Session, the Board reviewed and discussed Executive Director Rebecca (Reynolds) Porter's Performance Evaluation. A motion was made by Vicky Wade and seconded by David Hawkins to approve the Performance Evaluation of Rebecca (Reynolds) Porter, LIFT CAA Executive Director. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item J).

Brent Franks, Board Member, requested the Board's consideration and possible action to approve the Renewal of Contract, Employment, and Compensation of Rebecca (Reynolds) Porter as LIFT CAA Executive Director. In accordance with Organizational Standards – Category 7, Standard 7.5, the Governing Board reviews and approves the Executive Director's compensation each calendar year. During Executive Session, the Board reviewed Reynolds' compensation, which is tied to the renewal of the contract and employment approval, and which was also discussed. A motion was made by Lori Greer and seconded by Brad Gernand to approve the Renewal of Contract and Employment of Rebecca (Reynolds) Porter as LIFT CAA Executive Director, along with approval of her Compensation as discussed by the Board in Executive Session. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item K).

Sheree Ensley, Fiscal Officer, requested the Board's consideration and possible action on filing of LIFT CAA's 2024 Form 990 and Oklahoma Tax Return (Organizational Standard 8.6). As required by Community Services Block Grant Organizational Standard 8.6, the agency's Form 990 must be completed on an annual basis and made available to the Board of Directors for review. The drafts of the Federal and State Returns have been checked by agency staff, in addition to review by the Finance/Audit/Loan Committee. Copies of the draft returns were also sent out to individual Board Members (via email) for review prior to the meeting. A motion was made by David Smith and seconded by Debra Williams to approve filing of LIFT CAA's 2024 Form 990 and Oklahoma Tax Return. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item L).

Rebecca (Reynolds) Porter, Executive Director, requested the Board's consideration and possible action to approve a Board Resolution authorizing the Executive Director to conduct business on behalf of LIFT CAA. Porter explained that this is an annual authorization typically approved in January, but a new resolution was necessary given the change of Board Chairman. A motion was made by Debra Williams and seconded by Brad Gernand to approve a Board Resolution authorizing the Executive Director to conduct business on behalf of LIFT CAA. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item M).

Rebecca (Reynolds) Porter, Executive Director, requested the Board's consideration and possible action to remove Johnny Moffitt as an authorized check signer for LIFT Community Action Agency, Inc. Porter explained that this action is necessary as Johnny Moffitt has retired from the agency. A motion was made by David Smith and seconded by Debra Williams to remove Johnny Moffitt as an authorized check signer for LIFT Community Action Agency, Inc. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item N).

Rebecca (Reynolds) Porter, Executive Director, requested the Board's consideration and possible action to approve Kinsey Cox as an authorized check signer for LIFT Community Action Agency, Inc. This approval is necessary to have a sufficient number of check signers available on a day-to-day basis, as the agency employs a system of checks and balances that requires two authorized signatures on each check issued. Kinsey Cox is the Administrative Assistant/CSBG Administrator/Public Relations Specialist within the LIFT CAA Administration Office. A motion was made by Lori Greer and seconded by Colby Bryant to approve Kinsey Cox as an authorized check signer for LIFT Community Action Agency, Inc. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item O).

Rebecca (Reynolds) Porter, Executive Director, requested the Board's consideration and possible action to approve the LIFT CAA Board of Directors Regular Meeting Dates for 2026 (Organizational Standard 5.5). All Regular Meetings of the Board of Directors will be held at 10:00 a.m. on the second Tuesday of each month at LIFT CAA's Head Start Administration Office, located at 1005 S. 5th Street in Hugo, Oklahoma. A motion was made by Colby Bryant and seconded by Debra Williams to approve the LIFT CAA Board of Directors Regular Meeting Dates for 2026. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item P).

Jordan Mack, Head Start Programs Assistant Director, requested the Board's consideration and possible action to approve the Policy Council Operating Procedures and Conflict Resolution/Impasse Policy. The Policy Council Operating Procedures and Conflict Resolution/Impasse Policy reflect Federal requirements contained in the Head Start Program Performance Standards. These documents are reviewed (with changes made as needed) and approved by the Board of Directors and Policy Council annually. No changes are being proposed. A motion was made by Sandra Meeks and seconded by Sharon Johnson to approve the Policy Council Operating Procedures and Conflict Resolution/Impasse Policy. The roll call vote was: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item Q).

Kathy James, Senior Program Planner, requested the Board's consideration and possible action to approve the Victim Services Programs Policies and Procedures Manual (Organizational

Standard 5.7). James explained that this approval is a requirement for the agency's Domestic Violence, Sexual Assault, Stalking Victim Services Program Certification through the Oklahoma Office of the Attorney General. She reviewed the proposed revisions to the Policies and Procedures Manual, which was last approved by the Board in January 2025. The proposed revisions are necessary to align with amendments to the Oklahoma Administrative Code that became effective July 11, 2025. After approval, the Policies and Procedures Manual will be disseminated to staff and volunteers, and made available to the community and clients. After review and discussion, a motion was made by Colby Bryant and seconded by Lori Greer to approve the Victim Services Programs Policies and Procedures Manual. The roll call vote was as follows: Yes 13; No 0; Abstain 0. The motion carried. The Voting Record is attached (Item R).

Kinsey Cox, Administrative Assistant/CSBG Administrator/Public Relations Specialist, facilitated a Strategic Planning session with Board Members to receive their input related to the agency's SWOT (Strengths, Weaknesses, Opportunities, and Threats) Analysis, in accordance with Organizational Standards 6.1 through 6.5. Cox first explained about ROMA and its cycle, and how it serves as groundwork for the Strategic Plan, which is informed by the Community Needs Assessment. As a Community Action Agency, LIFT CAA is required to have a three- to five-year Strategic Plan. The agency's current plan (2023–2025) was approved by the Board of Directors in December 2022. The Strategic Plan needs to include input and participation from the Board Members as this information serves as a foundation for the agency's strategic planning moving forward. Board Members were then asked to complete a SWOT Analysis worksheet, listing the agency's strengths, weaknesses, opportunities, and threats from their perspective. Findings from the SWOT Analysis will be used to create the new LIFT CAA Strategic Plan.

Rebecca (Reynolds) Porter, Executive Director, provided the Board with training over the LIFT CAA Board Self-Assessment (Organizational Standard 5.7). The agency is required to conduct the Board Member Self-Assessment every two years. Board Members essentially "rate" themselves in a series of questions related to the Board and its functioning. The Self-Assessment was distributed to the Board for completion in September of 2025, with an 88% participation rate. The top five highest scored areas of performance (in order) focused on Board Structure, Board Meetings, Chief Executive Oversight, Financial Oversight, and Program Oversight. In relation to other Boards assessed and benchmarking performance, LIFT CAA's Board of Directors rated higher than the national average on all scores, which shows a positive correlation with existing orientation and training efforts. After reviewing the results and facilitating discussion, Porter explained that she and the Board Training Committee will use these results to develop a two-year action plan to raise capacity in areas identified as needs by Board Members.

Mattie McKee, Head Start Programs Assistant Director, provided the Board with the Policy Council Report for the September 16, 2025 meeting (Organizational Standards 2.1 and 5.9).

Rebecca (Reynolds) Porter, Executive Director, recognized John Freelove (Driver, Transit Program) as the October 2025 Employee of the Month.

Rebecca (Reynolds) Porter, Executive Director, recognized the following Service Award recipients: 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).

Brent Franks, Board Member, presented the Other Reports/Announcements/ Correspondence as follows: Head Start Programs Monthly Reports (Program Summary, Communication and Guidance, Enrollment/Attendance, Meals/Snack, Data Analysis); Head Start Awareness Month; Domestic Violence Awareness Month; and 2024 LIFT CAA Annual Report (Organizational Standard 5.9).

There was no New Business brought before the Board.

Brent Franks, Board Member, requested the Board's vote to adjourn. A motion was made by Debra Williams and seconded by Colby Bryant to adjourn the regular meeting. The roll call vote was as follows: Yes 12; No 0; Abstain 0. The motion carried. Voting record is attached (Item Z).

The Regular Meeting adjourned at 12:14 p.m.

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Sandra Meeks, Secretary/Treasurer

CALL TO ORDER: 10:07 am

V. WADE / D. WILLIAMS — C. BRYANT / P. SMITH — D. SMITH / D. WILLIAMS — D. HAWKINS / L. GREER — D. SMITH / C. BRYANT

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

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10:18 am 10:46 am

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

				L. GREER		C. BRYANT	C. BRYANT		D. WILLIAMS	S. MEEKS		S. JOHNSON	C. BRYANT		L. GREER	D. WILLIAMS		C. BRYANT
	October 14, 2025	**Present**	**Absent**	O			P			Q			R			Z		
				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	David Hawkins	✓		✓			✓			✓			✓			✓		
10	Andrea Henkel		✓															
11	Jordan Hill		✓															
12	Jia Johnson		✓															
13	Sharon Johnson	✓		✓			✓			✓			✓			✓		
14	Vickie Leathers	✓		✓			✓			✓			✓			✓		
15	Sandra Meeks	✓		✓			✓			✓			✓			✓		
16	Carolyn Pool		✓															
17	David Smith	✓		✓			✓			✓			✓					
18	Consuelo Splawn	✓		✓			✓			✓			✓			✓		
19	Jim Bob Sullivan		✓															
20	Vicky Wade	✓		✓			✓			✓			✓			✓		
21	Debra Williams	✓		✓			✓			✓			✓			✓		
22	Craig Young		✓															
23	William Smith		✓															
24																		
25																		
26																		
27																		

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

FINANCIAL ROW	AMOUNT (AS OF NOV 2025)	COMPARISON AMOUNT (AS OF FY 2024)	VARIANCE	% VARIANCE
ASSETS				
Current Assets				
Bank				
1000 - Cash				
1010 - Checking Account	$7,936,779.11	$8,646,823.07	($710,043.96)	-8.21%
1020 - Payroll Account	$398,304.16	$9,316.68	$388,987.48	4,175.17%
1021 - First United Accounts Payable	$127,098.34	$13,885.75	$113,212.59	815.31%
1022 - First United TH Reserve	$153,578.81	$146,772.86	$6,805.95	4.64%
1023 - First United General Escrow	$159,687.56	$178,390.15	($18,702.59)	-10.48%
1024 - First United Marina License	$164.66	$253.90	($89.24)	-35.15%
1025 - First United Deposit (PayPal)	$2,987.34	$2,115.20	$872.14	41.23%
1028 - First United Unrestricted Funds CD	$874,788.08	$849,505.41	$25,282.67	2.98%
1030 - Shamrock Bank - Clayton	$1,877.22	$1,854.10	$23.12	1.25%
1040 - Petty Cash	$735.00	$835.00	($100.00)	-11.98%
1050 - McCurtain County National Bank	$15,233.62	$6,449.31	$8,784.31	136.21%
Total - 1000 - Cash	**$9,671,233.90**	**$9,856,201.43**	**($184,967.53)**	**-1.88%**
Total Bank	**$9,671,233.90**	**$9,856,201.43**	**($184,967.53)**	**-1.88%**
Accounts Receivable				
1100 - Receivables	**$772,654.87**	**$1,002,533.43**	**($229,878.56)**	**-22.93%**
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	$247,370.53	$227,561.53	$19,809.00	8.70%
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	$111,010.92	$0.00	$111,010.92	0.00%
Total - 1300 - Other receivables	**$1,509,580.16**	**$1,477,020.30**	**$32,559.86**	**2.20%**
Total Accounts Receivable	**$2,282,235.03**	**$2,479,553.73**	**($197,318.70)**	**-7.96%**
Other Current Asset				
1400 - Other assets	**$115,818.58**	**$35,733.08**	**$80,085.50**	**224.12%**
1500 - Investments				
1530 - Property/Lots held for Sale	$375,516.35	$375,516.35	$0.00	0.00%
1599 - Undeposited Funds	$21,898.50	$468.35	$21,430.15	4,575.67%
Total - 1500 - Investments	**$397,414.85**	**$375,984.70**	**$21,430.15**	**5.70%**
NS097 - Interfund Due to /Due from	($738.73)	($738.73)	$0.00	0.00%
Payroll Float	$399,017.97	$303,788.87	$95,229.10	31.35%
Total Other Current Asset	**$911,512.67**	**$714,767.92**	**$196,744.75**	**27.53%**
Total Current Assets	**$12,864,981.60**	**$13,050,523.08**	**($185,541.48)**	**-1.42%**
Fixed Assets				
1600 - Fixed operating assets				
1610 - Land	$1,087,094.00	$1,087,094.00	$0.00	0.00%
1620 - Buildings	$7,056,276.04	$7,056,276.04	$0.00	0.00%
1630 - Leasehold Improvements	$2,123,010.79	$2,123,010.79	$0.00	0.00%
1640 - Computers & Equipment over $5,000	$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%**

FINANCIAL ROW	AMOUNT (AS OF NOV 2025)	COMPARISON AMOUNT (AS OF FY 2024)	VARIANCE	% VARIANCE
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				
1810 - Right to Use Asset - Leases	$31,847.83	$31,847.83	$0.00	0.00%
1950 - Stale Dated Payables	($12.99)	($12.99)	$0.00	0.00%
Total - 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	**$20,320,366.72**	**$20,505,908.20**	**($185,541.48)**	**-0.90%**
Liabilities & Equity				
Current Liabilities				
Accounts Payable				
2000 - Payables				
2010 - AP Accrued monthly	($21,313.77)	($18,712.60)	($2,601.17)	13.90%
Total - 2000 - Payables	**($21,313.77)**	**($18,712.60)**	**($2,601.17)**	**13.90%**
Total Accounts Payable	**($21,313.77)**	**($18,712.60)**	**($2,601.17)**	**13.90%**
Other Current Liability				
2100 - Accrued liabilities	**$1,256,084.13**	**$1,514,880.95**	**($258,796.82)**	**-17.08%**
2400 - Refundable Advances				
2450 - Apartment Sec Deposits Payable	$34,298.50	$30,349.50	$3,949.00	13.01%
2455 - Sales Taxes Payable	$3,529.32	($11.25)	$3,540.57	-31,471.73%
Total - 2400 - Refundable Advances	**$37,827.82**	**$30,338.25**	**$7,489.57**	**24.69%**
2500 - Short-term notes & loans payable	**$115,270.00**	**$0.00**	**$115,270.00**	**0.00%**
Total Other Current Liability	**$1,409,181.95**	**$1,545,219.20**	**($136,037.25)**	**-8.80%**
Total Current Liabilities	**$1,387,868.18**	**$1,526,506.60**	**($138,638.42)**	**-9.08%**
Long Term Liabilities				
2700 - Long-term notes & loans payable				
2770 - Long-term liabilities - Mower Loan	$0.00	$482.99	($482.99)	-100.00%
2780 - Lease liability	$15,846.10	$15,846.10	$0.00	0.00%
Total - 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	**$18,916,652.44**	**$18,963,072.51**	**($46,420.07)**	**-0.24%**
Total Liabilities & Equity	**$20,320,366.72**	**$20,505,908.20**	**($185,541.48)**	**-0.90%**

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

FINANCIAL ROW	AMOUNT (JAN 2025 - NOV 2025)	COMPARATIVE AMOUNT (FY 2024)	VARIANCE	% VARIANCE
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	**$80,051.04**	**$66,066.44**	**$13,984.60**	**21.17%**
4100 - Inkind Revenue	**$816,729.47**	**$1,519,251.09**	**($702,521.62)**	**-46.24%**
4200 - Miscellaneous Revenue	**$1,143,274.74**	**$1,254,930.89**	**($111,656.15)**	**-8.90%**
4400 - State Revenue	**$3,449,007.61**	**$1,793,753.10**	**$1,655,254.51**	**92.28%**
4500 - Federal Revenue	**$13,363,873.04**	**$15,332,653.05**	**($1,968,780.01)**	**-12.84%**
4900 - Recoveries from Programs	**$3,557,109.72**	**$3,993,852.84**	**($436,743.12)**	**-10.94%**
5000 - Rental Revenue	**$837,474.41**	**$756,661.79**	**$80,812.62**	**10.68%**
5100 - Program Fee Revenue	**$1,256,832.16**	**$1,522,032.67**	**($265,200.51)**	**-17.42%**
5300 - Interest and Dividends	**$108,184.83**	**$319,105.51**	**($210,920.68)**	**-66.10%**
5400 - Revenue from other sources	**$1,187,442.72**	**$1,681,254.64**	**($493,811.92)**	**-29.37%**
5800 - Special Event	**$20,962.30**	**$5,266.00**	**$15,696.30**	**298.07%**
Total - Income	**$25,820,942.04**	**$28,244,828.02**	**($2,423,885.98)**	**-8.58%**
Cost Of Sales				
8000 - Cost of Goods Sold	**$7,411.11**	**$2,810.86**	**$4,600.25**	**163.66%**
Total - Cost Of Sales	**$7,411.11**	**$2,810.86**	**$4,600.25**	**163.66%**
Gross Profit	**$25,813,530.93**	**$28,242,017.16**	**($2,428,486.23)**	**-8.60%**
Expense				
7000 - Grants, contracts, & direct assistance	**$835,306.09**	**$1,770,162.16**	**($934,856.07)**	**-52.81%**
7200 - Salaries & related expenses	**$10,923,635.28**	**$12,510,254.57**	**($1,586,619.29)**	**-12.68%**
7300 - Indirect Cost Pool Expense	**$1,621,076.51**	**$2,176,494.77**	**($555,418.26)**	**-25.52%**
7500 - Contract/Consultant Services	**$1,723,757.27**	**$2,045,519.13**	**($321,761.86)**	**-15.73%**
8100 - Non personnel expenses	**$1,045,310.44**	**$1,205,980.27**	**($160,669.83)**	**-13.32%**
8200 - Facility & equipment expenses	**$2,838,108.66**	**$3,222,733.80**	**($384,625.14)**	**-11.93%**
8300 - Travel & meetings expenses	**$532,573.03**	**$640,446.09**	**($107,873.06)**	**-16.84%**
8400 - Insurance Expense	$1,975,902.95	$2,235,204.58	($259,301.63)	-11.60%
8600 - Business expenses	**$0.00**	**$1,704.01**	**($1,704.01)**	**-100.00%**
8700 - Food Expenses	**$1,491,085.94**	**$1,742,261.67**	**($251,175.73)**	**-14.42%**
8800 - In-Kind Expenses	**$816,729.47**	**$1,519,251.09**	**($702,521.62)**	**-46.24%**
Total - Expense	**$23,803,485.64**	**$29,070,012.14**	**($5,266,526.50)**	**-18.12%**
Net Ordinary Income	**$2,010,045.29**	**($827,994.98)**	**$2,838,040.27**	**-342.76%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense	**$2,056,465.36**	**$1,867,637.48**	**$188,827.88**	**10.11%**
Total - Other Expense	**$2,056,465.36**	**$1,867,637.48**	**$188,827.88**	**10.11%**
Net Other Income	**($2,056,465.36)**	**($1,867,637.48)**	**($188,827.88)**	**10.11%**
Net Income	**($46,420.07)**	**($2,695,632.46)**	**$2,649,212.39**	**-98.28%**

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

FINANCIAL ROW	- UNASSIGNED - Amount	CAPITAL Amount	FUNDRAISING Amount	MANAGEMENT & GENERAL (ADMIN) Amount	OTHER Amount	PROGRAM SERVICES Amount	*TOTAL* *Amount*
Operating Activities							
Net Income	($339,868.38)	($36,804.37)	$183.23	($222,454.07)	$642.59	$551,880.93	($46,420.07)
Adjustments to Net Income							
Accounts Receivable	$186,483.66	($58,455.88)	$0.00	$0.00	$0.00	$69,290.92	$197,318.70
Other Current Asset	$80,999.18	($5,655.87)	$0.00	($71,309.33)	$0.00	($179,348.58)	($175,314.60)
Accounts Payable	($2,601.17)	$0.00	$0.00	$0.00	$0.00	$0.00	($2,601.17)
Sales Tax Payable	$27,975.85	$0.00	$0.00	$0.00	$0.00	($24,435.28)	$3,540.57
Other Current Liabilities	$754,207.46	$0.00	$0.00	$101,006.49	$0.00	($994,791.77)	($139,577.82)
Total Adjustments to Net Income	**$1,047,064.98**	**($64,111.75)**	**$0.00**	**$29,697.16**	**$0.00**	**($1,129,284.71)**	**($116,634.32)**
Total Operating Activities	**$707,196.60**	**($100,916.12)**	**$183.23**	**($192,756.91)**	**$642.59**	**($577,403.78)**	**($163,054.39)**
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	**$706,713.83**	**($100,916.12)**	**$183.23**	**($192,756.91)**	**$642.59**	**($577,404.00)**	**($163,537.38)**
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	**$35,053,719.00**	**($97,422.12)**	**$1,914.51**	**($11,062,715.56)**	**$1,408.02**	**($14,203,771.45)**	**$9,693,132.40**

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

FINANCIAL ROW	AMOUNT
ASSETS	
Current Assets	
Bank	
1000 - Cash	
1010 - Checking Account	$7,936,779.11
1020 - Payroll Account	$398,304.16
1021 - First United Accounts Payable	$127,098.34
1022 - First United TH Reserve	$153,578.81
1023 - First United General Escrow	$159,687.56
1024 - First United Marina License	$164.66
1025 - First United Deposit (PayPal)	$2,987.34
1028 - First United Unrestricted Funds CD	$874,788.08
1030 - Shamrock Bank - Clayton	$1,877.22
1040 - Petty Cash	$735.00
1050 - McCurtain County National Bank	$15,233.62
Total - 1000 - Cash	**$9,671,233.90**
Total Bank	**$9,671,233.90**
Accounts Receivable	
1100 - Receivables	
1105 - Accrued Acct Receivable	$228,938.28
1110 - Accounts Receivable	$544,079.55
1120 - Due From (A/R)	($362.96)
Total - 1100 - Receivables	**$772,654.87**
1300 - Other receivables	
1320 - Notes/loans receivable	$282,077.02
1321 - Loans Receivable from Belmont	$181,588.48
1322 - Loans Receivable from Clayton	$247,370.53
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	$111,010.92
Total - 1300 - Other receivables	**$1,509,580.16**
Total Accounts Receivable	**$2,282,235.03**
Other Current Asset	
1400 - Other assets	
1450 - Prepaid Expenses	$115,900.31
1465 - Advances Paid	($81.73)
Total - 1400 - Other assets	**$115,818.58**
1500 - Investments	
1530 - Property/Lots held for Sale	$375,516.35
1599 - Undeposited Funds	$21,898.50
Total - 1500 - Investments	**$397,414.85**
NS097 - Interfund Due to /Due from	($738.73)
Payroll Float	$399,017.97
Total Other Current Asset	**$911,512.67**
Total Current Assets	**$12,864,981.60**
Fixed Assets	
1600 - Fixed operating assets	
1610 - Land	$1,087,094.00
1620 - Buildings	$7,056,276.04
1630 - Leasehold Improvements	$2,123,010.79

FINANCIAL ROW	AMOUNT
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	**$20,320,366.72**
Liabilities & Equity	
Current Liabilities	
Accounts Payable	
2000 - Payables	
2010 - AP Accrued monthly	($21,313.77)
Total - 2000 - Payables	**($21,313.77)**
Total Accounts Payable	**($21,313.77)**
Other Current Liability	
2100 - Accrued liabilities	
2105 - Accrued Expense Payables	$79,886.02
2110 - Wages Payable	$572,557.94
2115 - Accrued Pension	$26,654.22
2120 - Accrued Employee Benefits	$276,561.24
2125 - Accrued Benefits	$67,348.99
2130 - Accrued payroll taxes	$29,229.50
2131 - Accrued Taxes	$33,430.32
2135 - Indirect Payable	$162,728.60
2150 - Home Loan Escrow Accounts	$2,387.73
2160 - Due to (Liab)	$22,255.06
2180 - Accrued Payroll Deductions	($16,955.49)
Total - 2100 - Accrued liabilities	**$1,256,084.13**
2400 - Refundable Advances	
2450 - Apartment Sec Deposits Payable	$34,298.50
2455 - Sales Taxes Payable	$3,529.32
Total - 2400 - Refundable Advances	**$37,827.82**
2500 - Short-term notes & loans payable	
2570 - Short-term liabilities - other	$115,270.00
Total - 2500 - Short-term notes & loans payable	**$115,270.00**
Total Other Current Liability	**$1,409,181.95**
Total Current Liabilities	**$1,387,868.18**
Long Term Liabilities	
2700 - Long-term notes & loans payable	
2780 - Lease liability	$15,846.10
Total - 2700 - Long-term notes & loans payable	**$15,846.10**
Total Long Term Liabilities	**$15,846.10**
Equity	**$18,916,652.44**
Total Liabilities & Equity	**$20,320,366.72**

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

FINANCIAL ROW	AMOUNT
Operating Activities	
Net Income	($46,420.07)
Adjustments to Net Income	
Accounts Receivable	$197,318.70
Other Current Asset	($175,314.60)
Accounts Payable	($2,601.17)
Sales Tax Payable	$3,540.57
Other Current Liabilities	($139,577.82)
Total Adjustments to Net Income	**($116,634.32)**
Total Operating Activities	**($163,054.39)**
Financing Activities	
Long Term Liabilities	($482.99)
Total Financing Activities	**($482.99)**
Net Change in Cash for Period	**($163,537.38)**
Cash at Beginning of Period	**$9,856,669.78**
Cash at End of Period	**$9,693,132.40**

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

FINANCIAL ROW	- UNASSIGNED - Amount	WITH DONOR RESTRICTIONS Amount	WITHOUT DONOR RESTRICTIONS Amount	TOTAL Amount
Operating Activities				
Net Income	($8,661,568.04)	$11,044.23	$8,604,103.74	($46,420.07)
Adjustments to Net Income				
Accounts Receivable	$186,483.66	$0.00	$10,835.04	$197,318.70
Other Current Asset	$275,444.61	$0.00	($450,759.21)	($175,314.60)
Accounts Payable	($2,601.17)	$0.00	$0.00	($2,601.17)
Sales Tax Payable	$0.00	$0.00	$3,540.57	$3,540.57
Other Current Liabilities	($50,424.59)	$0.00	($89,153.23)	($139,577.82)
Total Adjustments to Net Income	**$408,902.51**	**$0.00**	**($525,536.83)**	**($116,634.32)**
Total Operating Activities	**($8,252,665.53)**	**$11,044.23**	**$8,078,566.91**	**($163,054.39)**
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	**($8,253,148.30)**	**$11,044.23**	**$8,078,566.69**	**($163,537.38)**
Cash at Beginning of Period	**$3,861,739.37**	**$0.00**	**$5,994,930.41**	**$9,856,669.78**
Cash at End of Period	**($4,391,408.93)**	**$11,044.23**	**$14,073,497.10**	**$9,693,132.40**

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
Program Revenue by Month
Sep 2025, Oct 2025, Nov 2025
Monthly distribution of Revenue by Restriction and Program

PROGRAM	SEPTEMBER 2025	OCTOBER 2025	NOVEMBER 2025	*TOTAL*
- Unassigned -				
HS -Head Start	$425,119.61	$466,597.71	$301,659.00	$1,193,376.32
Early Head Start Child Care	$97,872.00	$226,865.00	$294,081.00	$618,818.00
CORE Dad Program	$239,264.48		$101,387.48	$340,651.96
TMA		$236,688.17		$236,688.17
Choosing Childbirth	$128,273.65			$128,273.65
CACFP - Daycare Homes	$118,994.10		$101,153.55	$220,147.65
Tri-CORPS	$112,331.00			$112,331.00
Healthy Start	$68,723.00	$73,014.00	$104,524.00	$246,261.00
- Unassigned -	$86,911.02			$86,911.02
WRO	$86,600.64		$69,222.12	$155,822.76
Weatherization	$85,043.00	$72,602.14		$157,645.14
Youth Build	$50,161.00	$44,491.00	$48,433.00	$143,085.00
TRANSIT			$49,257.00	$49,257.00
Second Chance	$5,564.55	$34,873.00		$40,437.55
HEAD START / EARLY HEAD START	$8,458.66	$8,424.24	$25,674.07	$42,556.97
Community Services	$24,801.17	$14,152.31	$654.20	$39,607.68
EHS -EARLY HEAD START	$15,869.41	$15,869.42		$31,738.83
Safe Place Healing Hearts	$14,270.22	$10,338.40		$24,608.62
RSVP	$12,937.00		$11,624.00	$24,561.00
Victim Services	$11,439.38	$10,626.37		$22,065.75
Early Learning Centers	$9,952.55	$9,678.35	$8,877.77	$28,508.67
State Park Operations	$9,829.67	$9,829.67		$19,659.34
VOCA	$6,656.99			$6,656.99
Mentoring	$3,590.69	$5,700.12		$9,290.81
CASA	$2,085.16	$1,533.74		$3,618.90
Housing	$1,013.32	$1,013.32		$2,026.64
RX	$690.01	$942.06		$1,632.07
Total - Unassigned -	**$1,626,452.28**	**$1,243,239.02**	**$1,116,547.19**	**$3,986,238.49**
Without Donor Restrictions				
Administration	$387,774.77	$400,393.13	$368,448.73	$1,156,616.63
Early Learning Centers	$72,504.23	$77,236.69	$125,170.59	$274,911.51
Housing	$11,762.13	$7,574.84	$123,553.61	$142,890.58
HS -Head Start	$120,341.42	$123,150.50	$60,019.36	$303,511.28
Economic Development (Lending)	$77,551.81	$2,211.81	$3,446.11	$83,209.73
WRO	$70,414.56		$69,887.20	$140,301.76
Apartments	$58,201.95	$58,482.33	$54,142.63	$170,826.91
State Park Operations	$39,738.81	$42,928.86	$39,984.59	$122,652.26
TMA		$31,623.42		$31,623.42
TRANSIT	$31,449.25	$27,926.38	$24,583.97	$83,959.60
EHS -EARLY HEAD START	$8,273.61	$8,273.61	$8,273.61	$24,820.83
Youth Build	$884.22	$519.64	$4,749.47	$6,153.33
HEAD START / EARLY HEAD START			$2,135.20	$2,135.20
Community Services	$2,025.00		$19.44	$2,044.44
RSVP	$1,094.96	$1,760.96	$277.75	$3,133.67
Early Head Start Child Care	$637.48	$1,399.08	$1,052.06	$3,088.62
Healthy Start		$986.18	$514.57	$1,500.75
Emergency Services		$267.00	$369.22	$636.22
Lending			$216.58	$216.58
Mentoring		$200.00	$49.89	$249.89
VOCA			$194.77	$194.77

PROGRAM	SEPTEMBER 2025	OCTOBER 2025	NOVEMBER 2025	TOTAL
CASA		$20.00	$75.10	$95.10
Tri-CORPS		$50.00	$59.40	$109.40
Second Chance			$3.15	$3.15
Choosing Childbirth		$0.00		$0.00
Total - Without Donor Restrictions	**$882,654.20**	**$785,004.43**	**$887,227.00**	**$2,554,885.63**
With Donor Restrictions				
HS -Head Start			$2,778.37	$2,778.37
Total - With Donor Restrictions			**$2,778.37**	**$2,778.37**
Total	**$2,509,106.48**	**$2,028,243.45**	**$2,006,552.56**	**$6,543,902.49**

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

Agency

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	$58,000.00	$80,051.04	($22,051.04)	138.02%
4100 - Inkind Revenue	$1,328,764.57	$816,729.47	$512,035.10	61.47%
4200 - Miscellaneous Revenue	$54,340.50	$1,143,274.74	($1,088,934.24)	2,103.91%
4400 - State Revenue	$5,029,154.01	$3,449,007.61	$1,580,146.40	68.58%
4500 - Federal Revenue	$9,857,882.61	$13,363,873.04	($3,505,990.43)	135.57%
4900 - Recoveries from Programs	$2,139,501.00	$3,557,109.72	($1,417,608.72)	166.26%
5000 - Rental Revenue	$0.00	$837,474.41	($837,474.41)	0.00%
5100 - Program Fee Revenue	$0.00	$1,256,832.16	($1,256,832.16)	0.00%
5300 - Interest and Dividends	$0.00	$108,184.83	($108,184.83)	0.00%
5400 - Revenue from other sources	$538,836.40	$1,187,442.72	($648,606.32)	220.37%
5800 - Special Event	$0.00	$20,962.30	($20,962.30)	0.00%
Total - Income	$19,006,479.09	$25,820,942.04	($6,814,462.95)	135.85%
Cost Of Sales				
8000 - Cost of Goods Sold	$0.00	$7,411.11	($7,411.11)	0.00%
Total - Cost Of Sales	$0.00	$7,411.11	($7,411.11)	0.00%
Gross Profit	$19,006,479.09	$25,813,530.93	($6,807,051.84)	135.81%
Expense				
7000 - Grants, contracts, & direct assistance	$145,192.00	$835,306.09	($690,114.09)	575.31%
7200 - Salaries & related expenses	$8,994,220.09	$10,923,635.28	($1,929,415.19)	121.45%
7300 - Indirect Cost Pool Expense	$1,377,608.40	$1,621,076.51	($243,468.11)	117.67%
7500 - Contract/Consultant Services	$1,921,094.46	$1,723,757.27	$197,337.19	89.73%
8100 - Non personnel expenses	$738,120.49	$1,045,310.44	($307,189.95)	141.62%
8200 - Facility & equipment expenses	$2,013,364.63	$2,838,108.66	($824,744.03)	140.96%
8300 - Travel & meetings expenses	$332,260.82	$532,573.03	($200,312.21)	160.29%
8400 - Insurance Expense	$133,355.00	$1,975,902.95	($1,842,547.95)	1,481.69%
8600 - Business expenses	$118,597.00	$0.00	$118,597.00	0.00%
8700 - Food Expenses	$139,575.00	$1,491,085.94	($1,351,510.94)	1,068.30%
8800 - In-Kind Expenses	$1,328,764.57	$816,729.47	$512,035.10	61.47%
Total - Expense	$17,242,152.46	$23,803,485.64	($6,561,333.18)	138.05%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	$1,549,501.09	$2,056,465.36	($506,964.27)	132.72%
Total - Other Expense	$1,549,501.09	$2,056,465.36	($506,964.27)	132.72%
Net Income	$214,825.54	($46,420.07)	$261,245.61	-21.61%

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

Operations

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4000 - Contribution Revenue	$0.00	$40.00	($40.00)	0.00%
4200 - Miscellaneous Revenue	$0.00	$20,276.65	($20,276.65)	0.00%
4900 - Recoveries from Programs	$2,139,501.00	$3,557,101.30	($1,417,600.30)	166.26%
5000 - Rental Revenue	$0.00	$373,797.91	($373,797.91)	0.00%
5100 - Program Fee Revenue	$0.00	($2,084.26)	$2,084.26	0.00%
5300 - Interest and Dividends	$0.00	$76,397.99	($76,397.99)	0.00%
5400 - Revenue from other sources	$0.00	$339,890.91	($339,890.91)	0.00%
5800 - Special Event	$0.00	$73.00	($73.00)	0.00%
Total - Income	$2,139,501.00	$4,365,493.50	($2,225,992.50)	204.04%
Gross Profit	$2,139,501.00	$4,365,493.50	($2,225,992.50)	204.04%
Expense				
7000 - Grants, contracts, & direct assistance	$0.00	$2,890.91	($2,890.91)	0.00%
7200 - Salaries & related expenses	$1,507,742.15	$865,275.78	$642,466.37	57.39%
7300 - Indirect Cost Pool Expense	$0.00	$15,816.95	($15,816.95)	0.00%
7500 - Contract/Consultant Services	$125,000.00	$370,689.27	($245,689.27)	296.55%
8100 - Non personnel expenses	$64,740.65	$65,680.23	($939.58)	101.45%
8200 - Facility & equipment expenses	$41,709.95	$302,318.43	($260,608.48)	724.81%
8300 - Travel & meetings expenses	$41,000.00	$40,285.55	$714.45	98.26%
8400 - Insurance Expense	$80,000.00	$1,552,990.27	($1,472,990.27)	1,941.24%
8700 - Food Expenses	$0.00	$8,805.02	($8,805.02)	0.00%
Total - Expense	$1,860,192.75	$3,224,752.41	($1,364,559.66)	173.36%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	$279,308.25	$236,602.39	$42,705.86	84.71%
Total - Other Expense	$279,308.25	$236,602.39	$42,705.86	84.71%
Net Income	$0.00	$904,138.70	($904,138.70)	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc

Lift Income/Expense Statement Summary
From Jan 2025 to Nov 2025

Financial Row	- No Department -	10 Operating		
		Administration	Building Funds	Total
	Amount	Amount	Amount	Amount
Income				
Income				
4000 - Contribution Revenue	$3,490.00	$40.00	$0.00	$40.00
4100 - Inkind Revenue	$0.00	$0.00	$0.00	$0.00
4200 - Miscellaneous Revenue	$160.00	$20,224.50	$52.15	$20,276.65
4400 - State Revenue	$109,818.02	$0.00	$0.00	$0.00
4500 - Federal Revenue	$0.00	$0.00	$0.00	$0.00
4900 - Recoveries from Programs	$8.42	$3,557,101.30	$0.00	$3,557,101.30
5000 - Rental Revenue	$0.00	$0.00	$373,797.91	$373,797.91
5100 - Program Fee Revenue	$4,240.76	$0.00	($2,084.26)	($2,084.26)
5300 - Interest and Dividends	$0.00	$74,922.27	$1,475.72	$76,397.99
5400 - Revenue from other sources	$0.00	$327,890.91	$12,000.00	$339,890.91
5800 - Special Event	$200.00	$73.00	$0.00	$73.00
Total - Income	$117,917.20	$3,980,251.98	$385,241.52	$4,365,493.50
Total Income	**$117,917.20**	**$3,980,251.98**	**$385,241.52**	**$4,365,493.50**
Expense				
Expense				
7000 - Grants, contracts, & direct assistance	$132.97	$2,890.91	$0.00	$2,890.91
7200 - Salaries & related expenses	$644,025.04	$865,275.78	$0.00	$865,275.78
7300 - Indirect Cost Pool Expense	$45,647.60	$15,816.95	$0.00	$15,816.95
7500 - Contract/Consultant Services	$10,891.71	$281,177.68	$89,511.59	$370,689.27
8100 - Non personnel expenses	$43,621.55	$55,304.96	$10,375.27	$65,680.23
8200 - Facility & equipment expenses	$367,984.89	$72,624.87	$229,693.56	$302,318.43
8300 - Travel & meetings expenses	$4,117.03	$39,902.65	$382.90	$40,285.55
8400 - Insurance Expense	$2,890.33	$1,462,607.09	$90,383.18	$1,552,990.27
8700 - Food Expenses	$888,396.22	$8,805.02	$0.00	$8,805.02
8800 - In-Kind Expenses	$0.00	$0.00	$0.00	$0.00
Other Expense				
8500 - Other Expense	$10,359.45	$227,823.54	$8,778.85	$236,602.39
Total Expense	**$2,018,066.79**	**$3,032,229.45**	**$429,125.35**	**$3,461,354.80**
8000 - Cost of Goods Sold				
8010 - Resale Fuel Expense	$0.00	$0.00	$0.00	$0.00
8020 - Ship Store (Resale Inv)	$541.68	$0.00	$0.00	$0.00
8021 - Ship Store (Beer)	$0.00	$0.00	$0.00	$0.00
Total - 8000 - Cost of Goods Sold	$541.68	$0.00	$0.00	$0.00
Gross	############	*$948,022.53*	*($43,883.83)*	*$904,138.70*

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2025 to Nov 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	$4,688.40	($688.40)	117.21%
4100 - Inkind Revenue	$1,316,864.57	$737,585.65	$579,278.92	56.01%
4200 - Miscellaneous Revenue	$0.00	$835,008.92	($835,008.92)	0.00%
4400 - State Revenue	$209,979.05	$230,735.01	($20,755.96)	109.88%
4500 - Federal Revenue	$6,882,362.00	$7,878,673.98	($996,311.98)	114.48%
5100 - Program Fee Revenue	$0.00	$415,998.16	($415,998.16)	0.00%
5300 - Interest and Dividends	$0.00	$17,593.89	($17,593.89)	0.00%
5400 - Revenue from other sources	$0.00	$300,000.00	($300,000.00)	0.00%
Total - Income	$8,413,205.62	$10,420,284.01	($2,007,078.39)	123.86%
Gross Profit	$8,413,205.62	$10,420,284.01	($2,007,078.39)	123.86%
Expense				
7200 - Salaries & related expenses	$4,648,348.31	$4,890,612.65	($242,264.34)	105.21%
7300 - Indirect Cost Pool Expense	$873,729.80	$837,334.12	$36,395.68	95.83%
7500 - Contract/Consultant Services	$1,107,775.00	$912,538.44	$195,236.56	82.38%
8100 - Non personnel expenses	$155,605.16	$455,146.52	($299,541.36)	292.50%
8200 - Facility & equipment expenses	$121,906.20	$273,105.80	($151,199.60)	224.03%
8300 - Travel & meetings expenses	$46,277.15	$100,457.25	($54,180.10)	217.08%
8400 - Insurance Expense	$44,175.00	$127,618.83	($83,443.83)	288.89%
8700 - Food Expenses	$72,137.00	$562,038.07	($489,901.07)	779.13%
8800 - In-Kind Expenses	$1,316,864.57	$737,585.65	$579,278.92	56.01%
Total - Expense	$8,386,818.19	$8,896,437.33	($509,619.14)	106.08%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	$189,619.00	$615,405.49	($425,786.49)	324.55%
Total - Other Expense	$189,619.00	$615,405.49	($425,786.49)	324.55%
Net Income	($163,231.57)	$908,441.19	($1,071,672.76)	-556.54%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc

Lift Income/Expense Statement Summary
From Jan 2025 to Nov 2025

Financial Row					20 Early Childhood				
		CACFP - Daycare Homes	CC EHS -Early Head Start CC	Early Learning Centers		HS/EHS			Total
						EHS	Head Start	Total	
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Income									
Income									
4000 - Contribution Revenue	$0.00	$0.00	$0.00	$4,000.00	$688.40	$0.00	$0.00	$688.40	$4,688.40
4100 - Inkind Revenue	$0.00	$0.00	$8,510.15	$4,060.00	$407,030.35	$61,402.32	$256,582.83	$725,015.50	$737,585.65
4200 - Miscellaneous Revenue	$3,037.46	$0.00	$0.00	$454,554.20	$298,853.83	$0.00	$78,563.43	$377,417.26	$835,008.92
4400 - State Revenue	$0.00	$0.00	$0.00	$0.00	$63,481.56	$87,428.58	$79,824.87	$230,735.01	$230,735.01
4500 - Federal Revenue	$124,370.39	$934,874.83	$2,198,524.00	$53,436.71	$1,979,930.84	$452,613.00	$2,134,924.21	$4,567,468.05	$7,878,673.98
4900 - Recoveries from Programs	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5000 - Rental Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5100 - Program Fee Revenue	$0.00	$0.00	$0.00	$415,998.16	$0.00	$0.00	$0.00	$0.00	$415,998.16
5300 - Interest and Dividends	$0.00	$0.00	$0.00	$9,343.78	$8,177.88	$0.00	$72.23	$8,250.11	$17,593.89
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
5800 - Special Event	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - Income	$127,407.85	$934,874.83	$2,207,034.15	$941,392.85	$3,058,162.86	$601,443.90	$2,549,967.57	$6,209,574.33	$10,420,284.01
Total Income	$127,407.85	$934,874.83	$2,207,034.15	$941,392.85	$3,058,162.86	$601,443.90	$2,549,967.57	$6,209,574.33	$10,420,284.01
Expense									
Expense									
7000 - Grants, contracts, & direct assistanc	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
7200 - Salaries & related expenses	$109,415.10	$79,400.87	$417,351.69	$693,908.29	$1,339,702.84	$751,877.82	$1,498,956.04	$3,590,536.70	$4,890,612.65
7300 - Indirect Cost Pool Expense	$20,891.55	$12,880.27	$61,219.34	$112,407.21	$196,866.40	$152,997.34	$280,072.01	$629,935.75	$837,334.12
7500 - Contract/Consultant Services	$0.00	$639.58	$731,730.89	$5,809.96	$145,445.73	$5,248.59	$23,663.69	$174,358.01	$912,538.44
8100 - Non personnel expenses	$32,037.13	$13,032.06	$132,717.69	$32,435.17	$96,259.56	$33,797.32	$114,867.59	$244,924.47	$455,146.52
8200 - Facility & equipment expenses	$748.00	$3,366.00	$26,206.89	$24,495.63	$135,849.19	$19,624.83	$62,815.26	$218,289.28	$273,105.80
8300 - Travel & meetings expenses	$4,144.11	$23,232.26	$17,521.57	$4,334.97	$20,584.24	$7,463.26	$23,176.84	$51,224.34	$100,457.25
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	$17,535.63	$3,094.95	$1,017.81	$116,782.14	$224,358.02	$7,360.63	$191,888.89	$423,607.54	$562,038.07
8800 - In-Kind Expenses	$0.00	$0.00	$8,510.15	$4,060.00	$407,030.35	$61,402.32	$256,582.83	$725,015.50	$737,585.65
Other Expense									
8500 - Other Expense	$1,272.50	$4,792.71	$380,327.69	$5,421.25	$99,636.25	$28,724.26	$95,230.83	$223,591.34	$615,405.49
Total Expense	$186,044.02	$140,438.70	$1,801,602.97	$1,016,641.02	$2,661,206.76	$1,087,585.14	$2,618,324.21	$6,367,116.11	$9,511,842.82
8000 - Cost of Goods Sold									
8010 - Resale Fuel Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8020 - Ship Store (Resale Inv)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8021 - Ship Store (Beer)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Gross	*($58,636.17)*	*$794,436.13*	*$405,431.18*	*($75,248.17)*	*$396,956.10*	*($486,141.24)*	*($68,356.64)*	*($157,541.78)*	*$908,441.19*

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2025 to Nov 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	$64,188.63	($17,188.63)	136.57%
4100 - Inkind Revenue	$11,900.00	$79,143.82	($67,243.82)	665.07%
4200 - Miscellaneous Revenue	$0.00	$2,552.35	($2,552.35)	0.00%
4400 - State Revenue	$2,832,904.96	$1,879,001.12	$953,903.84	66.33%
4500 - Federal Revenue	$2,365,673.00	$2,495,509.91	($129,836.91)	105.49%
5100 - Program Fee Revenue	$0.00	$90.00	($90.00)	0.00%
5300 - Interest and Dividends	$0.00	$1,258.47	($1,258.47)	0.00%
5400 - Revenue from other sources	$0.00	$25,376.00	($25,376.00)	0.00%
5800 - Special Event	$0.00	$9,165.14	($9,165.14)	0.00%
Total - Income	$5,257,477.96	$4,556,285.44	$701,192.52	86.66%
Gross Profit	$5,257,477.96	$4,556,285.44	$701,192.52	86.66%
Expense				
7000 - Grants, contracts, & direct assistance	$115,192.00	$64,831.10	$50,360.90	56.28%
7200 - Salaries & related expenses	$2,324,918.63	$2,236,657.39	$88,261.24	96.20%
7300 - Indirect Cost Pool Expense	$407,668.60	$362,929.55	$44,739.05	89.03%
7500 - Contract/Consultant Services	$682,469.46	$207,203.43	$475,266.03	30.36%
8100 - Non personnel expenses	$430,926.66	$334,419.56	$96,507.10	77.60%
8200 - Facility & equipment expenses	$255,479.48	$258,182.23	($2,702.75)	101.06%
8300 - Travel & meetings expenses	$203,215.67	$130,061.30	$73,154.37	64.00%
8400 - Insurance Expense	$2,430.00	$8,831.48	($6,401.48)	363.44%
8700 - Food Expenses	$64,558.00	$31,643.35	$32,914.65	49.02%
8800 - In-Kind Expenses	$11,900.00	$79,143.82	($67,243.82)	665.07%
Total - Expense	$4,498,758.50	$3,713,903.21	$784,855.29	82.55%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	$789,041.75	$811,605.10	($22,563.35)	102.86%
Total - Other Expense	$789,041.75	$811,605.10	($22,563.35)	102.86%
Net Income	($30,322.29)	$30,777.13	($61,099.42)	-101.50%

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

Financial Row		CORE DAD	Choosing Childbirth	Community Services	Emergency Services	Healthy Start	Mentoring	RCOR TRI-CORP
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Income								
Income								
4000 - Contribution Revenue	$0.00	$0.00	$0.00	$8,263.97	$110.00	$0.00	$205.00	$34,090.00
4100 - Inkind Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
4200 - Miscellaneous Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$511.98	$0.00	$0.00
4400 - State Revenue	$0.00	$324,325.08	$248,873.20	$620,461.28	$0.00	$0.00	$0.00	$0.00
4500 - Federal Revenue	$0.00	$0.00	$0.00	$208,055.18	$0.00	$1,004,770.00	$32,310.98	$330,953.08
4900 - Recoveries from Programs	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5000 - Rental Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5100 - Program Fee Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$90.00
5300 - Interest and Dividends	$33.19	$0.00	$0.00	$28.91	$8.01	$15.83	$151.46	$140.51
5400 - Revenue from other sources	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$17,376.00
5800 - Special Event	$0.00	$0.00	$0.00	$0.00	$534.00	$986.18	$0.00	$876.73
Total - Income	$33.19	$324,325.08	$248,873.20	$836,809.34	$652.01	$1,006,283.99	$32,667.44	$383,526.32
Total Income	**$33.19**	**$324,325.08**	**$248,873.20**	**$836,809.34**	**$652.01**	**$1,006,283.99**	**$32,667.44**	**$383,526.32**
Expense								
Expense								
7000 - Grants, contracts, & direct assistance	$0.00	$2,236.75	$6,025.88	$42,486.59	$1,200.00	$0.00	$199.74	$0.00
7200 - Salaries & related expenses	$142,277.27	$78,913.06	$112,533.11	$473,338.12	$0.00	$514,441.85	$25,342.38	$196,347.76
7300 - Indirect Cost Pool Expense	$27,599.78	$10,238.68	$21,190.66	$86,256.18	$0.00	$94,353.23	$3,738.97	$31,132.28
7500 - Contract/Consultant Services	$0.00	$0.00	$0.00	$25,501.66	$0.00	$101,578.46	$699.48	$5,000.00
8100 - Non personnel expenses	$903.78	$12,422.35	$15,589.25	$84,693.30	$0.00	$28,648.82	$3,863.89	$52,247.12
8200 - Facility & equipment expenses	$6,392.07	$18,880.79	$9,415.73	$27,181.49	$0.00	$47,424.50	$2,024.00	$18,762.46
8300 - Travel & meetings expenses	$0.00	$2,341.30	$3,131.94	$19,154.99	$0.00	$33,143.91	$445.20	$6,167.60
8400 - Insurance Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,324.00
8700 - Food Expenses	$0.00	$7,494.95	$1,038.17	$11,466.38	$0.00	$52.56	$0.00	$0.00
8800 - In-Kind Expenses	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Other Expense								
8500 - Other Expense	$8,922.08	$103,177.32	$130,762.13	$114,797.63	$40.00	$133,668.33	$2,601.69	$14,050.39
Total Expense	**$186,094.98**	**$235,705.20**	**$299,686.87**	**$884,876.34**	**$1,240.00**	**$953,311.66**	**$38,915.35**	**$325,031.61**
8000 - Cost of Goods Sold								
8010 - Resale Fuel Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8020 - Ship Store (Resale Inv)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8021 - Ship Store (Beer)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Gross	***($186,061.79)***	***$88,619.88***	***($50,813.67)***	***($48,067.00)***	***($587.99)***	***$52,972.33***	***($6,247.91)***	***$58,494.71***

30 Community Service

RSVP	RX	Second Chance	Victim Services					WORK READY OK	Youth Build	Total
Amount	Amount	Amount	Amount	CASA Amount	Safe Place Healing Hearts Amount	VOCA Amount	Total Amount	Amount	Amount	Amount
$1,080.00	$0.00	$0.00	$174.41	$0.00	$0.00	$0.00	$174.41	$0.00	$20,265.25	$64,188.63
$7,671.47	$0.00	$0.00	$2,016.54	$0.00	$0.00	$0.00	$2,016.54	$0.00	$69,455.81	$79,143.82
$0.00	$0.00	$0.00	$0.00	$400.00	$0.00	$0.00	$400.00	$0.00	$1,640.37	$2,552.35
$0.00	$7,433.69	$0.00	$5,259.73	$8,739.78	$0.00	$0.00	$13,999.51	$663,908.36	$0.00	$1,879,001.12
$76,004.00	$0.00	$173,368.61	$69,725.66	$0.00	$99,145.73	$37,345.67	$206,217.06	$0.00	$463,831.00	$2,495,509.91
$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$90.00
$0.00	$0.00	$19.14	$501.80	$86.73	$0.00	$177.33	$765.86	$0.00	$95.56	$1,258.47
$8,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$25,376.00
$1,241.14	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$5,527.09	$9,165.14
$93,996.61	$7,433.69	$173,387.75	$77,678.14	$9,226.51	$99,145.73	$37,523.00	$223,573.38	$663,908.36	$560,815.08	$4,556,285.44
$93,996.61	**$7,433.69**	**$173,387.75**	**$77,678.14**	**$9,226.51**	**$99,145.73**	**$37,523.00**	**$223,573.38**	**$663,908.36**	**$560,815.08**	**$4,556,285.44**
$0.00	$0.00	$0.00	$1,023.16	$0.00	$5,178.32	$592.24	$6,793.72	$0.00	$5,888.42	$64,831.10
$55,857.09	$5,083.15	$83,346.75	$4,520.84	$0.00	$99,498.03	$86,513.30	$190,532.17	$132,899.57	$225,745.11	$2,236,657.39
$7,947.11	$1,020.74	$8,955.75	($4,254.13)	$40.69	$19,163.55	$16,163.63	$31,113.74	$23,815.09	$15,567.34	$362,929.55
$0.00	$0.00	$62,253.38	$1,812.70	$0.00	$411.52	$0.00	$2,224.22	$6,524.13	$3,422.10	$207,203.43
$2,439.71	$0.00	($86.76)	$2,541.09	$2,525.95	$1,289.28	$527.30	$6,883.62	$83,014.91	$43,799.57	$334,419.56
$1,628.00	$0.00	$6,243.00	$6,553.50	$1,740.00	$4,246.50	$740.00	$13,280.00	$69,825.17	$37,125.02	$258,182.23
$3,090.50	$79.80	$10,281.14	$6,962.45	$5,178.18	$4,366.46	$667.90	$17,174.99	$11,404.77	$23,645.16	$130,061.30
$1,814.48	$0.00	$882.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$4,811.00	$8,831.48
$496.10	$0.00	$0.00	$22.21	$0.00	$0.00	$0.00	$22.21	$11,048.84	$24.14	$31,643.35
$7,671.47	$0.00	$0.00	$2,016.54	$0.00	$0.00	$0.00	$2,016.54	$0.00	$69,455.81	$79,143.82
$3,979.84	$1,250.00	$7,140.55	$6,251.55	$38.00	$799.38	$29.85	$7,118.78	$159,600.02	$124,496.34	$811,605.10
$84,924.30	**$7,433.69**	**$179,015.81**	**$27,449.91**	**$9,522.82**	**$134,953.04**	**$105,234.22**	**$277,159.99**	**$498,132.50**	**$553,980.01**	**$4,525,508.31**
$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
$9,072.31	***$0.00***	***($5,628.06)***	***$50,228.23***	***($296.31)***	***($35,807.31)***	***($67,711.22)***	***($53,586.61)***	***$165,775.86***	***$6,835.07***	***$30,777.13***

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2025 to Nov 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**	**$216,350.98**	**($216,350.98)**	**0.00%**
4400 - State Revenue	**$1,186,270.00**	**$992,346.80**	**$193,923.20**	**83.65%**
4500 - Federal Revenue	**$301,918.11**	**$2,306,151.15**	**($2,004,233.04)**	**763.83%**
5000 - Rental Revenue	**$0.00**	**$460,096.00**	**($460,096.00)**	**0.00%**
5100 - Program Fee Revenue	**$0.00**	**$62,820.50**	**($62,820.50)**	**0.00%**
5300 - Interest and Dividends	**$0.00**	**($8,509.46)**	**$8,509.46**	**0.00%**
5400 - Revenue from other sources	**$538,836.40**	**$459,117.10**	**$79,719.30**	**85.21%**
Total - Income	**$2,034,024.51**	**$4,495,373.07**	**($2,461,348.56)**	**221.01%**
Gross Profit	**$2,034,024.51**	**$4,495,373.07**	**($2,461,348.56)**	**221.01%**
Expense				
7000 - Grants, contracts, & direct assistance	**$0.00**	**$767,451.11**	**($767,451.11)**	**0.00%**
7200 - Salaries & related expenses	**$146,452.00**	**$1,069,670.49**	**($923,218.49)**	**730.39%**
7300 - Indirect Cost Pool Expense	**$27,945.00**	**$160,611.76**	**($132,666.76)**	**574.74%**
7500 - Contract/Consultant Services	**$5,850.00**	**$126,245.64**	**($120,395.64)**	**2,158.05%**
8100 - Non personnel expenses	**$27,179.02**	**$61,667.32**	**($34,488.30)**	**226.89%**
8200 - Facility & equipment expenses	**$1,193,224.00**	**$1,399,679.98**	**($206,455.98)**	**117.30%**
8300 - Travel & meetings expenses	**$8,000.00**	**$104,442.01**	**($96,442.01)**	**1,305.53%**
8400 - Insurance Expense	$6,750.00	$109,704.36	($102,954.36)	1,625.25%
8600 - Business expenses	**$118,597.00**	**$0.00**	**$118,597.00**	**0.00%**
8700 - Food Expenses	**$0.00**	**$203.28**	**($203.28)**	**0.00%**
Total - Expense	**$1,533,997.02**	**$3,799,675.95**	**($2,265,678.93)**	**247.70%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense	**$91,648.09**	**$309,311.60**	**($217,663.51)**	**337.50%**
Total - Other Expense	**$91,648.09**	**$309,311.60**	**($217,663.51)**	**337.50%**
Net Income	**$408,379.40**	**$386,385.52**	**$21,993.88**	**94.61%**

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc

Lift Income/Expense Statement Summary
From Jan 2025 to Nov 2025

Financial Row	40 Housing Department									
		Apartments	Construction	HUD Apartments (Lift)		Housing Weatherization	Total	Self Help Housing	TMA	Total
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
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
4100 - Inkind Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
4200 - Miscellaneous Revenue	$0.00	$353.05	$0.00	$0.00	$184,374.51	$0.00	$184,374.51	$0.00	$31,623.42	$216,350.98
4400 - State Revenue	$0.00	$0.00	$0.00	$0.00	$992,346.80	$0.00	$992,346.80	$0.00	$0.00	$992,346.80
4500 - Federal Revenue	$0.00	$0.00	$101,372.97	$0.00	$729,951.37	$284,920.40	$1,014,871.77	$0.00	$1,189,906.41	$2,306,151.15
4900 - Recoveries from Programs	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5000 - Rental Revenue	$0.00	$460,096.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$460,096.00
5100 - Program Fee Revenue	$15.00	$19,612.60	$0.00	$11,949.44	$31,243.46	$0.00	$31,243.46	$0.00	$0.00	$62,820.50
5300 - Interest and Dividends	$53,156.00	($68,660.21)	$0.00	$0.00	$6,994.75	$0.00	$6,994.75	$0.00	$0.00	($8,509.46)
5400 - Revenue from other sources	$0.00	$14,275.00	$0.00	$0.00	$444,842.10	$0.00	$444,842.10	$0.00	$0.00	$459,117.10
5800 - Special Event	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - Income	$53,171.00	$425,676.44	$101,372.97	$11,949.44	$2,396,752.99	$284,920.40	$2,681,673.39	$0.00	$1,221,529.83	$4,495,373.07
Total Income	**$53,171.00**	**$425,676.44**	**$101,372.97**	**$11,949.44**	**$2,396,752.99**	**$284,920.40**	**$2,681,673.39**	**$0.00**	**$1,221,529.83**	**$4,495,373.07**
Expense										
Expense										
7000 - Grants, contracts, & direct assistance	$58,406.00	($61,980.79)	$0.00	$0.00	$446,025.90	$0.00	$446,025.90	$0.00	$325,000.00	$767,451.11
7200 - Salaries & related expenses	$72,029.33	$55,442.22	$301,431.65	($109.44)	($7,814.85)	$268,695.99	$260,881.14	$0.00	$379,995.59	$1,069,670.49
7300 - Indirect Cost Pool Expense	$13,889.99	$10,704.51	$56,343.52	$3,247.54	($14,458.66)	$38,187.95	$23,729.29	$0.00	$52,696.91	$160,611.76
7500 - Contract/Consultant Services	$0.00	$47,392.21	$16,847.65	$0.00	$43,984.53	$18,021.25	$62,005.78	$0.00	$0.00	$126,245.64
8100 - Non personnel expenses	$7.68	$9,038.36	$5,584.06	($7.43)	$20,245.46	$13,590.98	$33,836.44	$0.00	$13,208.21	$61,667.32
8200 - Facility & equipment expenses	$0.00	$197,530.42	$5,708.18	$0.00	$1,152,593.73	$11,947.65	$1,164,541.38	$0.00	$31,900.00	$1,399,679.98
8300 - Travel & meetings expenses	$60.00	($657.79)	$4,719.23	$299.04	$27,865.22	$9,913.47	$37,778.69	$0.00	$62,242.84	$104,442.01
8400 - Insurance Expense	$0.00	$81,333.90	$0.00	$0.00	$23,557.46	$2,165.00	$25,722.46	$0.00	$2,648.00	$109,704.36
8700 - Food Expenses	$0.00	$0.00	$0.00	$0.00	$203.28	$0.00	$203.28	$0.00	$0.00	$203.28
8800 - In-Kind Expenses	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Other Expense										
8500 - Other Expense	$1,185.72	$20,801.29	$4,411.05	$0.00	$219,916.07	$34,666.50	$254,582.57	$0.00	$28,330.97	$309,311.60
Total Expense	**$145,578.72**	**$359,604.33**	**$395,045.34**	**$3,429.71**	**$1,912,118.14**	**$397,188.79**	**$2,309,306.93**	**$0.00**	**$896,022.52**	**$4,108,987.55**
8000 - Cost of Goods Sold										
8010 - Resale Fuel Expense	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8020 - Ship Store (Resale Inv)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8021 - Ship Store (Beer)	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total - 8000 - Cost of Goods Sold	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**
Gross	***($92,407.72)***	***$66,072.11***	***($293,672.37)***	***$8,519.73***	***$484,634.85***	***($112,268.39)***	***$372,366.46***	***$0.00***	***$325,507.31***	***$386,385.52***

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

Transportation

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**	**$138,810.00**	**($138,810.00)**	**0.00%**
4500 - Federal Revenue	**$307,929.50**	**$608,538.00**	**($300,608.50)**	**197.62%**
5000 - Rental Revenue	**$0.00**	**$3,580.50**	**($3,580.50)**	**0.00%**
5100 - Program Fee Revenue	**$0.00**	**$319,401.61**	**($319,401.61)**	**0.00%**
5300 - Interest and Dividends	**$0.00**	**$733.48**	**($733.48)**	**0.00%**
5400 - Revenue from other sources	**$0.00**	**$54,180.73**	**($54,180.73)**	**0.00%**
Total - Income	**$362,270.00**	**$1,192,295.37**	**($830,025.37)**	**329.12%**
Gross Profit	**$362,270.00**	**$1,192,295.37**	**($830,025.37)**	**329.12%**
Expense				
7200 - Salaries & related expenses	**$0.00**	**$924,163.40**	**($924,163.40)**	**0.00%**
7300 - Indirect Cost Pool Expense	**$0.00**	**$145,951.56**	**($145,951.56)**	**0.00%**
7500 - Contract/Consultant Services	**$0.00**	**$15,213.78**	**($15,213.78)**	**0.00%**
8100 - Non personnel expenses	**$0.00**	**$49,386.79**	**($49,386.79)**	**0.00%**
8200 - Facility & equipment expenses	**$362,270.00**	**$44,367.57**	**$317,902.43**	**12.25%**
8300 - Travel & meetings expenses	**$0.00**	**$142,736.38**	**($142,736.38)**	**0.00%**
8400 - Insurance Expense	$0.00	$89,899.88	($89,899.88)	0.00%
Total - Expense	**$362,270.00**	**$1,411,719.36**	**($1,049,449.36)**	**389.69%**
Other Income and Expenses				
Other Expense				
8500 - Other Expense	**$0.00**	**$20,684.51**	**($20,684.51)**	**0.00%**
Total - Other Expense	**$0.00**	**$20,684.51**	**($20,684.51)**	**0.00%**
Net Income	**$0.00**	**($240,108.50)**	**$240,108.50**	**0.00%**

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

Financial Row		50 Transportation	
		Transit	Total
	Amount	Amount	Amount
Income			
Income			
4000 - Contribution Revenue	$0.00	$0.00	$0.00
4100 - Inkind Revenue	$0.00	$0.00	$0.00
4200 - Miscellaneous Revenue	$0.00	$67,051.05	$67,051.05
4400 - State Revenue	$0.00	$138,810.00	$138,810.00
4500 - Federal Revenue	$0.00	$608,538.00	$608,538.00
4900 - Recoveries from Programs	$0.00	$0.00	$0.00
5000 - Rental Revenue	$0.00	$3,580.50	$3,580.50
5100 - Program Fee Revenue	$8,920.20	$310,481.41	$319,401.61
5300 - Interest and Dividends	$0.00	$733.48	$733.48
5400 - Revenue from other sources	$0.00	$54,180.73	$54,180.73
5800 - Special Event	$0.00	$0.00	$0.00
Total - Income	$8,920.20	$1,183,375.17	$1,192,295.37
Total Income	**$8,920.20**	**###########**	**###########**
Expense			
Expense			
7000 - Grants, contracts, & direct assistance	$0.00	$0.00	$0.00
7200 - Salaries & related expenses	$29,002.82	$895,160.58	$924,163.40
7300 - Indirect Cost Pool Expense	$5,049.88	$140,901.68	$145,951.56
7500 - Contract/Consultant Services	$0.00	$15,213.78	$15,213.78
8100 - Non personnel expenses	$0.00	$49,386.79	$49,386.79
8200 - Facility & equipment expenses	$0.00	$44,367.57	$44,367.57
8300 - Travel & meetings expenses	$0.00	$142,736.38	$142,736.38
8400 - Insurance Expense	$0.00	$89,899.88	$89,899.88
8700 - Food Expenses	$0.00	$0.00	$0.00
8800 - In-Kind Expenses	$0.00	$0.00	$0.00
Other Expense			
8500 - Other Expense	$0.00	$20,684.51	$20,684.51
Total Expense	**$34,052.70**	**###########**	**###########**
8000 - Cost of Goods Sold			
8010 - Resale Fuel Expense	$0.00	$0.00	$0.00
8020 - Ship Store (Resale Inv)	$0.00	$0.00	$0.00
8021 - Ship Store (Beer)	$0.00	$0.00	$0.00
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$0.00
Gross	***##########***	***($214,976.00)***	***($240,108.50)***

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc
LIFT | Budget vs. Actual by Grant
From Jan 2025 to Nov 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	$644.01	($644.01)	0.00%
4200 - Miscellaneous Revenue	$0.00	$1,874.79	($1,874.79)	0.00%
4400 - State Revenue	$0.00	$98,296.66	($98,296.66)	0.00%
4500 - Federal Revenue	$0.00	$75,000.00	($75,000.00)	0.00%
5100 - Program Fee Revenue	$0.00	$456,365.39	($456,365.39)	0.00%
5300 - Interest and Dividends	$0.00	$20,710.46	($20,710.46)	0.00%
5400 - Revenue from other sources	$0.00	$8,877.98	($8,877.98)	0.00%
5800 - Special Event	$0.00	$11,524.16	($11,524.16)	0.00%
Total - Income	$0.00	$673,293.45	($673,293.45)	0.00%
Cost Of Sales				
8000 - Cost of Goods Sold	$0.00	$6,869.43	($6,869.43)	0.00%
Total - Cost Of Sales	$0.00	$6,869.43	($6,869.43)	0.00%
Gross Profit	$0.00	$666,424.02	($666,424.02)	0.00%
Expense				
7200 - Salaries & related expenses	$0.00	$293,230.53	($293,230.53)	0.00%
7300 - Indirect Cost Pool Expense	$0.00	$52,784.97	($52,784.97)	0.00%
7500 - Contract/Consultant Services	$0.00	$80,975.00	($80,975.00)	0.00%
8100 - Non personnel expenses	$0.00	$35,388.47	($35,388.47)	0.00%
8200 - Facility & equipment expenses	$0.00	$192,469.76	($192,469.76)	0.00%
8300 - Travel & meetings expenses	$0.00	$10,473.51	($10,473.51)	0.00%
8400 - Insurance Expense	$0.00	$83,967.80	($83,967.80)	0.00%
Total - Expense	$0.00	$749,290.04	($749,290.04)	0.00%
Other Income and Expenses				
Other Expense				
8500 - Other Expense	$0.00	$52,496.82	($52,496.82)	0.00%
Total - Other Expense	$0.00	$52,496.82	($52,496.82)	0.00%
Net Income	$0.00	($135,362.84)	$135,362.84	0.00%

LIFT Community Action Agency Inc
Parent - Lift : LIFT Community Action Agency Inc

Lift Income/Expense Statement Summary

From Jan 2025 to Nov 2025

Financial Row	60 Economic Development								
	Economic Development/Lending			State Parks					Total
		Lending	Total		Clayton Lake	Hugo Lake	Raymond Gary	Total	
	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount	Amount
Income									
Income									
4000 - Contribution Revenue	$0.00	$0.00	$0.00	$642.44	$1.56	$0.00	$0.01	$644.01	$644.01
4100 - Inkind Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
4200 - Miscellaneous Revenue	$0.00	$0.00	$0.00	$1,874.79	$0.00	$0.00	$0.00	$1,874.79	$1,874.79
4400 - State Revenue	$0.00	$0.00	$0.00	$39,318.68	$28,515.00	$0.00	$30,462.98	$98,296.66	$98,296.66
4500 - Federal Revenue	$75,000.00	$0.00	$75,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$75,000.00
4900 - Recoveries from Programs	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5000 - Rental Revenue	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
5100 - Program Fee Revenue	($6,064.43)	$0.00	($6,064.43)	$367,695.54	$25,728.97	$21,272.30	$47,733.01	$462,429.82	$456,365.39
5300 - Interest and Dividends	$20,120.82	$216.58	$20,337.40	$258.00	$0.00	$0.03	$115.03	$373.06	$20,710.46
5400 - Revenue from other sources	$1,183.80	$0.00	$1,183.80	$7,266.71	$85.00	$43.61	$298.86	$7,694.18	$8,877.98
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	$90,240.19	$216.58	$90,456.77	$428,230.32	$54,330.53	$21,665.94	$78,609.89	$582,836.68	$673,293.45
Total Income	**$90,240.19**	**$216.58**	**$90,456.77**	**$428,230.32**	**$54,330.53**	**$21,665.94**	**$78,609.89**	**$582,836.68**	**$673,293.45**
Expense									
Expense									
7000 - Grants, contracts, & direct assistance	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
7200 - Salaries & related expenses	$0.00	($19,629.08)	($19,629.08)	$33,053.89	$50,968.22	$171,170.61	$57,666.89	$312,859.61	$293,230.53
7300 - Indirect Cost Pool Expense	$0.00	$6,720.12	$6,720.12	($8,701.89)	$9,632.07	$33,833.39	$11,301.28	$46,064.85	$52,784.97
7500 - Contract/Consultant Services	$0.00	$0.00	$0.00	$72,564.75	$640.00	$3,436.75	$4,333.50	$80,975.00	$80,975.00
8100 - Non personnel expenses	$0.00	($151.06)	($151.06)	$27,596.88	$3,520.71	$1,445.96	$2,975.98	$35,539.53	$35,388.47
8200 - Facility & equipment expenses	$0.00	($1,812.50)	($1,812.50)	$148,837.36	$17,614.53	$12,048.87	$15,781.50	$194,282.26	$192,469.76
8300 - Travel & meetings expenses	$0.00	($121.10)	($121.10)	$4,673.30	$236.60	$1,601.03	$4,083.68	$10,594.61	$10,473.51
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
8700 - Food Expenses	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
8800 - In-Kind Expenses	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Other Expense									
8500 - Other Expense	$0.00	($0.55)	($0.55)	$46,827.83	$1,264.32	$1,682.81	$2,722.41	$52,497.37	$52,496.82
Total Expense	**$0.00**	**($14,994.17)**	**($14,994.17)**	**$397,456.02**	**$87,965.96**	**$225,219.42**	**$106,139.63**	**$816,781.03**	**$801,786.86**
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	$273.87	$0.00	$1,289.77	$1,289.77
8021 - Ship Store (Beer)	$0.00	$0.00	$0.00	$1,003.40	$0.00	$0.00	$0.00	$1,003.40	$1,003.40
Total - 8000 - Cost of Goods Sold	$0.00	$0.00	$0.00	$6,051.21	$0.00	$818.22	$0.00	$6,869.43	$6,869.43
Gross	***$90,240.19***	***$15,210.75***	***$105,450.94***	***$30,774.30***	***($33,635.43)***	***($203,553.48)***	***($27,529.74)***	***($233,944.35)***	***($128,493.41)***

LIFT Community Action Agency Inc

Parent - Lift : LIFT Community Action Agency Inc

Credit Card Vendor Totals

Nov 2025

Options: Show Zeros

NAME	AMOUNT (GROSS)
Elan Travel Bank	$62,183.98
HOME DEPOT BRC/GECF	$4,281.42
Total	**$66,465.40**

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

Program	Contract/Consultant Services	Facility & equipment expenses					Food Expenses				Grants, contracts, & direct assistance				
	Contract Services Amount	Construction Rehab & Renovation Amount	APPLIANCES & EQUIPMENT - NOT CAPITALIZED Amount	Repair/Maint for Building/Equip Amount	WX Tools & Equipment Amount	Total Amount	Food Nutrition Cost Amount	Non -Food, Nutrition Cost Amount	Other Food Expense Amount	Total Amount	Direct Assistance - Other Amount	Direct Assistance - Rental Amount	Direct Assistance - Utilities Amount	Total Amount	Events/Meeting Expense Amount
Administration				$98.23		$98.23			$1,455.11	$1,455.11				$0.00	
CASA						$0.00			$22.21	$22.21				$0.00	
Choosing Childbirth						$0.00			$71.71	$71.71	$139.95			$139.95	
Community Services						$0.00			$1,397.40	$1,397.40				$0.00	
Early Head Start Child Care				$2.85		$2.85				$0.00				$0.00	
Early Learning Centers						$0.00	$242.97	$52.78	$217.13	$512.88				$0.00	
HEAD START / EARLY HEAD START						$0.00	$109.98	$867.76		$977.74				$0.00	
Healthy Start						$0.00				$0.00				$0.00	
Housing		$3,213.36				$3,213.36				$0.00				$0.00	
HS -Head Start	$120.00			$53.28		$53.28				$0.00				$0.00	
Mentoring						$0.00				$0.00	$199.74			$199.74	$6.16
Safe Place Healing Hearts						$0.00				$0.00	$137.04		$188.27	$325.31	
State Park Operations	$165.00		$878.62	$1,193.86		$2,072.48				$0.00				$0.00	
TMA						$0.00				$0.00				$0.00	
TRANSIT						$0.00				$0.00				$0.00	
Tri-CORPS						$0.00				$0.00				$0.00	
Victim Services						$0.00				$0.00	$136.04	$490.00	$205.90	$831.94	
Weatherization	$295.00				$230.99	$230.99				$0.00				$0.00	
WRO						$0.00		$32.00	$463.27	$495.27				$0.00	
Youth Build						$0.00			$8.36	$8.36				$0.00	$201.53
Total	**$580.00**	**$3,213.36**	**$878.62**	**$1,348.22**	**$230.99**	**$5,671.19**	**$352.95**	**$952.54**	**$3,635.19**	**$4,940.68**	**$612.77**	**$490.00**	**$394.17**	**$1,496.94**	**$207.69**

Non personnel expenses						Other Expense							Travel & meetings expenses			Total
Office/Teaching Supplies Amount	Other/Maint Supplies Amount	Special Events Amount	Telephone & Internet Amount	WX Materials Amount	Total Amount	Advertising & Community Sponsorships Amount	Computer & Software Related Expenses Amount	Fees/Dues Amount	Incentive Expense Amount	Other Expenses Amount	Training & TTA Amount	Total Amount	Fuel Cost Amount	Out of Area Travel Amount	Total Amount	Amount
	$187.52		$589.95		$777.47		$2,788.10	$20.80				$2,808.90		$364.12	$364.12	$5,503.83
	$16.06				$16.06							$0.00			$0.00	$38.27
$4,638.66					$4,638.66		$468.00		$6,906.50			$7,374.50			$0.00	$12,224.82
					$0.00			$179.00				$179.00			$0.00	$1,576.40
					$0.00			$18.56			$2,100.00	$2,118.56			$0.00	$2,121.41
$806.82					$806.82			$217.00			$64.00	$281.00			$0.00	$1,600.70
					$0.00							$0.00			$0.00	$977.74
					$0.00	$870.87					$7,424.18	$8,295.05			$0.00	$8,295.05
					$0.00			$350.00				$350.00		$616.63	$616.63	$4,179.99
$7,269.76			$1,080.00		$8,349.76		$5.50	$306.94	$1,000.00	$71.00	$3.31	$1,386.75			$0.00	$9,909.79
					$6.16							$0.00			$0.00	$205.90
					$0.00							$0.00			$0.00	$325.31
$138.10	$728.00		$1,112.06		$1,978.16					$44.00		$44.00	$39.89		$39.89	$4,299.53
					$0.00	$561.47	$203.88	$50.00				$815.35		$5,671.13	$5,671.13	$6,486.48
					$0.00			$64.95				$64.95			$0.00	$64.95
					$0.00				$100.00			$100.00			$0.00	$100.00
					$0.00							$0.00			$0.00	$831.94
				$655.17	$655.17							$0.00			$0.00	$1,181.16
$78.17		$941.72			$1,019.89	$939.22	$76.00			$1,374.05		$2,389.27			$0.00	$3,904.43
$35.63	$93.45				$330.61						$2,298.73	$2,298.73			$0.00	$2,637.70
$12,967.14	**$1,025.03**	**$941.72**	**$2,782.01**	**$655.17**	**$18,578.76**	**$2,371.56**	**$3,541.48**	**$1,207.25**	**$8,006.50**	**$1,489.05**	**$11,890.22**	**$28,506.06**	**$39.89**	**$6,651.88**	**$6,691.77**	**$66,465.40**

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**	**$591,558.76**	**$308,274.24**	**65.74%**
4200 - Miscellaneous Revenue	**$0.00**	**$6,479.20**	**($6,479.20)**	**0.00%**
4500 - Federal Revenue				
4510 - Federal Grants	$3,592,315.00	$3,442,380.00	$149,935.00	95.83%
Total - 4500 - Federal Revenue	**$3,592,315.00**	**$3,442,380.00**	**$149,935.00**	**95.83%**
Total - Income	**$4,492,148.00**	**$4,040,417.96**	**$451,730.04**	**89.94%**
Gross Profit	**$4,492,148.00**	**$4,040,417.96**	**$451,730.04**	**89.94%**
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	$2,190,433.24	$1,825,913.55	$364,519.69	83.36%
7230 - Pension plan contributions	$206,265.12	$128,630.01	$77,635.11	62.36%
7240 - Employee benefits - not pension	$176,022.13	$312,531.65	($136,509.52)	177.55%
7250 - Payroll taxes, etc.	$220,091.66	$147,049.68	$73,041.98	66.81%
Total - 7200 - Salaries & related expenses	**$2,792,812.15**	**$2,414,124.89**	**$378,687.26**	**86.44%**
7300 - Indirect Cost Pool Expense	**$538,441.00**	**$423,840.75**	**$114,600.25**	**78.72%**
7500 - Contract/Consultant Services	**$46,700.00**	**$54,356.62**	**($7,656.62)**	**116.40%**
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	$14,500.00	$75,773.52	($61,273.52)	522.58%
8120 - Other/Maint Supplies	$0.00	$16,998.87	($16,998.87)	0.00%
8130 - Telephone & Internet	$10,500.00	$56,143.00	($45,643.00)	534.70%
8140 - Postage & shipping	$160.00	$1,297.46	($1,137.46)	810.91%
8150 - Medical/Dental Supplies	$0.00	$5,928.85	($5,928.85)	0.00%
8160 - Events/Meeting Expense	$0.00	$203.13	($203.13)	0.00%
8170 - Printing & copying	$1,080.00	$13,182.17	($12,102.17)	1,220.57%
8180 - Fatherhood	$1,000.00	$0.00	$1,000.00	0.00%
Total - 8100 - Non personnel expenses	**$27,240.00**	**$169,527.00**	**($142,287.00)**	**622.35%**
8200 - Facility & equipment expenses				
8210 - Space Lease	$9,997.80	$3,031.55	$6,966.25	30.32%
8220 - Electric	$14,750.00	$44,600.48	($29,850.48)	302.38%
8225 - Water	$5,500.00	$5,893.97	($393.97)	107.16%
8230 - Trash	$2,000.00	$8,721.19	($6,721.19)	436.06%
8235 - Sewer	$2,000.00	$4,735.05	($2,735.05)	236.75%
8240 - Natural Gas	$2,000.00	$2,201.77	($201.77)	110.09%
8260 - Repair/Maint for Building/Equip	$14,918.40	$35,679.62	($20,761.22)	239.17%
Total - 8200 - Facility & equipment expenses	**$51,166.20**	**$104,863.63**	**($53,697.43)**	**204.95%**
8300 - Travel & meetings expenses				
8310 - Local Travel	$10,000.00	$25,610.67	($15,610.67)	256.11%
8320 - Out of Area Travel	$3,659.65	$392.00	$3,267.65	10.71%
8330 - Fuel Cost	$0.00	$3,527.88	($3,527.88)	0.00%
8335 - Vehicle Repair & Maint	$2,865.00	$13.85	$2,851.15	0.48%
8340 - Child Transportation Exp	$0.00	$2,264.97	($2,264.97)	0.00%
Total - 8300 - Travel & meetings expenses	**$16,524.65**	**$31,809.37**	**($15,284.72)**	**192.50%**
8400 - Insurance Expense	$24,675.00	$66,544.41	($41,869.41)	269.68%
8700 - Food Expenses				
8710 - Food Nutrition Cost	$46,800.00	$188,211.95	($141,411.95)	402.16%
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	% OF BUDGET
Total - 8700 - Food Expenses	**$46,800.00**	**$189,877.46**	**($143,077.46)**	**405.72%**
8800 - In-Kind Expenses	**$899,833.00**	**$591,558.76**	**$308,274.24**	**65.74%**
Total - Expense	**$4,444,192.00**	**$4,046,502.89**	**$397,689.11**	**91.05%**
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	$4,655.62	$344.38	93.11%
8540 - Training & TTA	$39,956.00	$41,524.90	($1,568.90)	103.93%
8560 - Computer & Software Related Expenses	$0.00	$38,998.94	($38,998.94)	0.00%
8570 - Advertising & Community Sponsorships	$2,000.00	$15,883.91	($13,883.91)	794.20%
8590 - Other Expenses	$1,000.00	$86.91	$913.09	8.69%
Total - 8500 - Other Expense	**$47,956.00**	**$104,063.24**	**($56,107.24)**	**217.00%**
Total - Other Expense	**$47,956.00**	**$104,063.24**	**($56,107.24)**	**217.00%**
Net Income	**$0.00**	**($110,148.17)**	**$110,148.17**	**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

EHS 24-25

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	**$253,800.00**	**$96,396.20**	**$157,403.80**	**37.98%**
4500 - Federal Revenue	**$1,022,216.00**	**$1,022,216.00**	**$0.00**	**100.00%**
Total - Income	**$1,276,016.00**	**$1,118,612.20**	**$157,403.80**	**87.66%**
Gross Profit	**$1,276,016.00**	**$1,118,612.20**	**$157,403.80**	**87.66%**
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	$559,106.00	$626,605.03	($67,499.03)	112.07%
7230 - Pension plan contributions	$52,334.65	$32,850.73	$19,483.92	62.77%
7240 - Employee benefits - not pension	$72,191.97	$107,027.80	($34,835.83)	148.25%
7250 - Payroll taxes, etc.	$55,863.38	$51,585.26	$4,278.12	92.34%
Total - 7200 - Salaries & related expenses	**$739,496.00**	**$818,068.82**	**($78,572.82)**	**110.63%**
7300 - Indirect Cost Pool Expense				
7310 - Indirect Expense	$140,843.00	$146,211.28	($5,368.28)	103.81%
Total - 7300 - Indirect Cost Pool Expense	**$140,843.00**	**$146,211.28**	**($5,368.28)**	**103.81%**
7500 - Contract/Consultant Services				
7550 - Contract Services	$2,500.00	$13,015.50	($10,515.50)	520.62%
Total - 7500 - Contract/Consultant Services	**$2,500.00**	**$13,015.50**	**($10,515.50)**	**520.62%**
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	$31,840.00	$34,181.31	($2,341.31)	107.35%
8120 - Other/Maint Supplies	$0.00	$5,955.72	($5,955.72)	0.00%
8130 - Telephone & Internet	$13,400.00	$10,504.45	$2,895.55	78.39%
8140 - Postage & shipping	$500.00	$92.37	$407.63	18.47%
8150 - Medical/Dental Supplies	$0.00	$1,653.34	($1,653.34)	0.00%
8160 - Events/Meeting Expense	$0.00	$168.61	($168.61)	0.00%
8170 - Printing & copying	$500.00	$5,187.31	($4,687.31)	1,037.46%
8180 - Fatherhood	$2,500.00	$0.00	$2,500.00	0.00%
Total - 8100 - Non personnel expenses	**$48,740.00**	**$57,743.11**	**($9,003.11)**	**118.47%**
8200 - Facility & equipment expenses				
8210 - Space Lease	$0.00	$438.09	($438.09)	0.00%
8220 - Electric	$8,000.00	$16,080.26	($8,080.26)	201.00%
8225 - Water	$1,000.00	$1,957.46	($957.46)	195.75%
8230 - Trash	$1,000.00	$2,393.91	($1,393.91)	239.39%
8235 - Sewer	$1,000.00	$1,281.98	($281.98)	128.20%
8240 - Natural Gas	$100.00	$1,316.93	($1,216.93)	1,316.93%
8245 - FURNITURE, APPLIANCES & EQUIPMENT - NOT CAPITALIZED	$0.00	$415.57	($415.57)	0.00%
8260 - Repair/Maint for Building/Equip	$4,000.00	$9,697.60	($5,697.60)	242.44%
Total - 8200 - Facility & equipment expenses	**$15,100.00**	**$33,581.80**	**($18,481.80)**	**222.40%**
8300 - Travel & meetings expenses				
8310 - Local Travel	$5,000.00	$5,425.03	($425.03)	108.50%
8320 - Out of Area Travel	$3,400.00	$152.42	$3,247.58	4.48%
8330 - Fuel Cost	$0.00	$1,337.62	($1,337.62)	0.00%
8335 - Vehicle Repair & Maint	$0.00	$4.62	($4.62)	0.00%
Total - 8300 - Travel & meetings expenses	**$8,400.00**	**$6,919.69**	**$1,480.31**	**82.38%**
8400 - Insurance Expense	$13,500.00	$19,088.77	($5,588.77)	141.40%
8700 - Food Expenses				
8710 - Food Nutrition Cost	$18,837.00	$34,048.86	($15,211.86)	180.76%

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
8720 - Non -Food, Nutrition Cost	$0.00	$92.34	($92.34)	0.00%
8730 - Other Food Expense	$0.00	$3,815.35	($3,815.35)	0.00%
Total - 8700 - Food Expenses	**$18,837.00**	**$37,956.55**	**($19,119.55)**	**201.50%**
8800 - In-Kind Expenses	**$253,800.00**	**$96,396.20**	**$157,403.80**	**37.98%**
Total - Expense	**$1,241,216.00**	**$1,228,981.72**	**$12,234.28**	**99.01%**
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	$3,648.10	($648.10)	121.60%
8540 - Training & TTA	$19,304.00	$19,698.85	($394.85)	102.05%
8560 - Computer & Software Related Expenses	$0.00	$11,958.65	($11,958.65)	0.00%
8570 - Advertising & Community Sponsorships	$1,000.00	$4,554.78	($3,554.78)	455.48%
8590 - Other Expenses	$11,496.00	$0.00	$11,496.00	0.00%
Total - 8500 - Other Expense	**$34,800.00**	**$40,023.92**	**($5,223.92)**	**115.01%**
Total - Other Expense	**$34,800.00**	**$40,023.92**	**($5,223.92)**	**115.01%**
Net Income	**$0.00**	**($150,393.44)**	**$150,393.44**	**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 2524

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Ordinary Income/Expense				
Income				
4100 - Inkind Revenue	**$0.00**	**$3,088.62**	**($3,088.62)**	**0.00%**
4500 - Federal Revenue	**$2,267,831.00**	**$655,885.00**	**$1,611,946.00**	**28.92%**
Total - Income	**$2,267,831.00**	**$658,973.62**	**$1,608,857.38**	**29.06%**
Gross Profit	**$2,267,831.00**	**$658,973.62**	**$1,608,857.38**	**29.06%**
Expense				
7200 - Salaries & related expenses				
7220 - Salaries & wages - other	$595,220.00	$196,559.24	$398,660.76	33.02%
7230 - Pension plan contributions	$48,403.00	$17,390.73	$31,012.27	35.93%
7240 - Employee benefits - not pension	$95,892.00	$34,109.44	$61,782.56	35.57%
7250 - Payroll taxes, etc.	$47,435.00	$15,017.95	$32,417.05	31.66%
Total - 7200 - Salaries & related expenses	**$786,950.00**	**$263,077.36**	**$523,872.64**	**33.43%**
7300 - Indirect Cost Pool Expense				
7310 - Indirect Expense	$156,543.00	$45,739.16	$110,803.84	29.22%
Total - 7300 - Indirect Cost Pool Expense	**$156,543.00**	**$45,739.16**	**$110,803.84**	**29.22%**
7500 - Contract/Consultant Services				
7540 - Professional Services	$3,500.00	$0.00	$3,500.00	0.00%
7550 - Contract Services	$15,840.00	$4,173.46	$11,666.54	26.35%
7560 - Partner Contracts	$1,039,235.00	$265,806.71	$773,428.29	25.58%
Total - 7500 - Contract/Consultant Services	**$1,058,575.00**	**$269,980.17**	**$788,594.83**	**25.50%**
8100 - Non personnel expenses				
8110 - Office/Teaching Supplies	$56,000.00	$28,893.40	$27,106.60	51.60%
8120 - Other/Maint Supplies	$0.00	$3,772.21	($3,772.21)	0.00%
8130 - Telephone & Internet	$7,200.00	$3,034.57	$4,165.43	42.15%
8140 - Postage & shipping	$5,000.00	$22.47	$4,977.53	0.45%
8150 - Medical/Dental Supplies	$2,000.00	$129.91	$1,870.09	6.50%
8170 - Printing & copying	$5,000.00	$1,010.32	$3,989.68	20.21%
8180 - Fatherhood	$2,000.00	$0.00	$2,000.00	0.00%
Total - 8100 - Non personnel expenses	**$77,200.00**	**$36,862.88**	**$40,337.12**	**47.75%**
8200 - Facility & equipment expenses				
8210 - Space Lease	$0.00	$359.20	($359.20)	0.00%
8220 - Electric	$3,600.00	$2,230.52	$1,369.48	61.96%
8225 - Water	$1,200.00	$101.71	$1,098.29	8.48%
8230 - Trash	$1,200.00	$280.60	$919.40	23.38%
8235 - Sewer	$1,200.00	$53.33	$1,146.67	4.44%
8240 - Natural Gas	$0.00	$132.84	($132.84)	0.00%
8260 - Repair/Maint for Building/Equip	$45,000.00	$9,044.30	$35,955.70	20.10%
Total - 8200 - Facility & equipment expenses	**$52,200.00**	**$12,202.50**	**$39,997.50**	**23.38%**
8300 - Travel & meetings expenses				
8310 - Local Travel	$7,500.00	$4,135.20	$3,364.80	55.14%
8320 - Out of Area Travel	$5,000.00	$283.09	$4,716.91	5.66%
8330 - Fuel Cost	$5,000.00	$57.00	$4,943.00	1.14%
Total - 8300 - Travel & meetings expenses	**$17,500.00**	**$4,475.29**	**$13,024.71**	**25.57%**
8400 - Insurance Expense	$6,000.00	$0.00	$6,000.00	0.00%
8700 - Food Expenses				
8710 - Food Nutrition Cost	$0.00	$367.15	($367.15)	0.00%
8720 - Non -Food, Nutrition Cost	$3,000.00	$0.00	$3,000.00	0.00%
8730 - Other Food Expense	$3,000.00	$23.35	$2,976.65	0.78%

FINANCIAL ROW	BUDGET AMOUNT	AMOUNT EXPENDED	BUDGET BALANCE	% OF BUDGET
Total - 8700 - Food Expenses	**$6,000.00**	**$390.50**	**$5,609.50**	**6.51%**
8800 - In-Kind Expenses	**$0.00**	**$3,088.62**	**($3,088.62)**	**0.00%**
Total - Expense	**$2,160,968.00**	**$635,816.48**	**$1,525,151.52**	**29.42%**
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	$463.78	$1,036.22	30.92%
8540 - Training & TTA	$42,863.00	$6,050.29	$36,812.71	14.12%
8560 - Computer & Software Related Expenses	$26,000.00	$228.71	$25,771.29	0.88%
8570 - Advertising & Community Sponsorships	$5,000.00	$6,275.37	($1,275.37)	125.51%
8590 - Other Expenses	$6,500.00	$0.00	$6,500.00	0.00%
8595 - Subsidy Expense	$0.00	$116,558.86	($116,558.86)	0.00%
Total - 8500 - Other Expense	**$106,863.00**	**$129,577.01**	**($22,714.01)**	**121.26%**
Total - Other Expense	**$106,863.00**	**$129,577.01**	**($22,714.01)**	**121.26%**
Net Income	**$0.00**	**($106,419.87)**	**$106,419.87**	**0.00%**

Choctaw Nation of Oklahoma
Child Care Assistance Office
P.O. Box 1210 • Durant, OK • 74702-1210
580-924-8280 or 1-800-522-6170
580-920-4959 Fax

Gary Batton, Chief

Jack Austin Jr, Asst. Chief

Dear Provider: September 1, 2025

The Choctaw Nation Child Care Assistance service is proud to be able to offer you this final opportunity to apply for the last year of Stabilization Grant payments. We are so grateful to have offered these grants for as long as we have. As always, if you choose to apply for the grants, you will be unable to charge co-payments. Quarterly payments are based on your facility's capacity and *will be sent out on the 15th of each funding month, which will be October 2025, January 2026, April 2026 and July 2026.* I ask that you continue sending me an email each quarter with an explanation of what you utilized that quarterly grant fund payment for, i.e. outdoor play equipment, bills, payroll, repairs, etc.

We will also begin mailing letters to parents/guardians in October to let them know that co-payments will be re-implemented ***October of 2027***. We will send additional letters each quarter as the year progresses, so they will not be blind-sided by this co-payment requirement. I will also send you all an email with the letter, so you can answer any questions that come from them.

The FY2025/2026 application and FAQs are included. Please return via any form listed below:

Email: ethompson@choctawnation.com
Fax: 580-920-4959
Mail: Choctaw Nation Child Care Assistance
Attn: Elizabeth Thompson
P.O. Box 1210
Durant, OK 74701

If you have any questions, please contact me directly at 580-642-7344 or
Email: ethompson@choctawnation.com

Thank you for all that you do!

Sincerely,

Elizabeth J Thompson

Program Manager

October 9, 2025

Becky Porter, Executive Director
LIFT Community Action Foundation (LIFT)
209 N. 4th Street
Hugo, OK 74743-0000

Dear Executive Director Porter:

The Oklahoma Department of Commerce/Community Development (ODOC/CD) is pleased to inform the LIFT Community Action Foundation (LIFT) that Department of Energy Weatherization Assistance Program (DOE WAP) funds for PY 2025 are now available.

Each agency can allocate Program funds by county based on need and available resources. Although it is not required to serve every county annually, every county must be served over a specified period (for example, every 2 or 3 years). Any counties that an agency decides not to serve in this program year must be listed in the OKGrants Management Plan Justification box, along with the planned year in which it is anticipated that the counties will be served next. If all counties will be served, please note that all counties will be served instead.

PY'25 Year-to-Date Total Award[1]

		Required Homes [2] [3]
Admin Amount	$45,566.00	
Training and Technical Assistance	$6,000.00	
Readiness Funds	$50,000.00	
Program Allocation (for Program Operations, Audit, Insurance, and Health & Safety)	$236,387.00	
DOE WPN 24-7 Intake/Eligibility	$60,000.00	
DOE WPN 24-7 Energy Audit	$78,000.00	
DOE WPN 24-7 QCI	$42,000.00	
Total Award Amount	**$517,953.00**	**22**

*Table 1 **The agency must be within 10% of the required minimum homes.*

[1] This total is based on Year-to-Date amounts award funds.
[2] The agency must be within 10% of the required homes. Agencies will not face any punitive actions in the current program year for achieving between 90% and 99% of their production goals, but they will have a note placed on their future WAP applications. This note may be considered a factor, along with others, in how funds are distributed in the future.
[3] To calculate the agency's PY25 required homes, ODOC added the agency's DOE WAP PY 24 audit and insurance total expenditures reported along with the PY25 maximum budgeted H&S and subtracted them from the formula allocated PY25 program allocation and divided by the current allowed ACPU.

For PY 2025, the Health and Safety budget cannot be initially budgeted at more than 19% of Program Operations expenditures, nor can the Average Cost Per Unit (ACPU) exceed $8,547. You may request ODOC permission to exceed either the H&S or ACPU threshold at any time before the end of the third quarter (December 30) during the contract period after initial contract execution. ODOC permission must be requested in writing via email through ODOC's Energy Projects Specialist.

On June 20, 2025, DOE released a Financial Assistance Letter that provided updated regulations regarding indirect and fringe benefits cost reimbursement. Starting with DOE WAP PY 25, Subgrantees will be limited to a **maximum percentage of 10% of the Total Award Amount for reimbursement of indirect costs and fringe benefits costs. Additional information will be found in the included Request for Application as well as in the Subgrantee's Contract Part II in OKGrants.**

Please proceed to OKGrants to apply for DOE WAP funds and complete the five (5) following required forms:

1. Applicant Information
2. Detailed Line-Item Budget
3. Management Plan
4. Audit
5. Uploads
   - 5.1. Agency Quality Control Inspector Building Performance Institute Certification(s)
   - 5.2. Energy Auditor Building Performance Institute Certification(s) (optional)
   - 5.3. Waiting Lists
   - 5.4. MOUs with third-party subcontractors (any) (including any other CAAs)
   - 5.5. Copy of statement or agreement that will be used with subcontractors to verify Field Guide/SWS Contractor Compliance
   - 5.6. Attached Training Plan

Application submission will initiate the process for preparing and executing an ODOC contract for the following contract period: **April 1, 2025 – March 31, 2026.** Applications should be initiated and submitted as soon as possible, but no later than **5:00 pm, November 7, 2025.**

Please understand that applying for this offer does not constitute your authority to expend funds or make any commitment of funds relative to the DOE WAP program until full execution of your contract has occurred. When you are notified that your contract is ready, carefully review it, taking note of all deadlines and the contract start date, as funds will not be reimbursed for expenditures made before the contract start date.

Please note that annual WAP funds may not be braided with BIL funds in the same home. Annual WAP funds may continue to be braided with DHS LIHEAP funds. Since WAP dollars will end sooner than BIL funding, prioritize spending annual WAP funds before BIL homes. Ideally, your agency will have enough workforce capacity to complete both BIL and annual WAP/LIHEAP homes at the same time. Please continue to work with ODOC as needed to increase workforce capacity or for assistance with production planning.

We look forward to working with you. If you have any questions about your award or how to initiate an application in OKGrants, please get in touch with Kayla Cornett by email at kayla.cornett@okcommerce.gov.

Funding Opportunity:	Contract for Transportation Services
Funding Entity:	Office of Management and Enterprise Services
Due Date:	November 19, 2025

The Office of Management and Enterprise Services, Central Purchasing Division published a proposal seeking responses from potential suppliers to provide a contract for the purchase of transportation services for recipients in the TANF (Temporary Assistance for Needy Families) program and similar programs.

LIFT Community Action Agency, Inc. is requesting the Board's approval to submit a bid for this opportunity to the Office of Management and Enterprise Services, Central Purchasing Division. If awarded, the initial contract would begin on January 1, 2026 and would go through June 30, 2026. The contract could be extended for up to four one-year options with a final agreement end date of June 30, 2032.

If selected for an award, LIFT would provide services for eligible participants and their minor children across the organizations service area of Choctaw, McCurtain and Pushmataha Counties. The service would be available Monday through Friday from 7:00 a.m. to 7:00 p.m.

Transportation services would include:

- Transportation to and from work locations and other work activities (job training, etc.)
- Transportation for activities i.e. substance abuse treatment, mental health treatment, job search activities, etc.
- Transportation of the minor children of TANF participants to and from day care facilities

LIFT CAA's bid for this service is $2.99/mile paid in increments of 10, 20, 30, 40 or 50 mile trips. This pricing would equate to the following reimbursement rates:

  - Up to 10 miles: $29.90 per trip
  - Up to 20 miles: $59.80 per trip
  - Up to 30 miles: $89.70 per trip
  - Up to 40 miles: $119.60 per trip
  - Up to 50 miles: $149.50 per trip

Funding Entity: NeighborWorks America
Funding Opportunity: NeighborWorks Flexible Impact Grant FY2026
Amount Requested: $260,000

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

1. Expendable
2. Capital

The expendable grant award is composed of four elements: Base, Organizational Health Tracking System Rating, Production, and Comprehensive Community Development. These four areas determine the amount of funding for which a NeighborWorks Organization is eligible to receive. Base award amounts for FY2026 are $87,000. The funding within the other three areas is unique to each organization's rating, production and levels of Comprehensive Development activities.

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

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

LIFT CAA is requesting the board's approval to prepare and submit the required plans and other required documentation to NeighborWorks America to be eligible for consideration of both funding opportunities (expendable and capital) within the NeighborWorks Flexible Impact Grant FY2026 opportunity.

Funding Entity: **AmeriCorps**
Funding Opportunity: **FY 2026 Retired and Senior Volunteer Program Grant Continuation Application**
Amount Requested: **$107,100**
Agency Program: **AmeriCorps Seniors RSVP**

The Retired and Senior Volunteer Program, also known as RSVP, has been operating in Choctaw, Pushmataha, and McCurtain counties since 1973. RSVP channels the talents and energies of people age 55 and over who would like to be of service in their community. There are no restrictions based on education, income, or experience; RSVP participants are given the choice of volunteer activities that suit their interests, talents, and time. RSVP volunteers currently serve in various capacities, including, but not limited to, nutrition/food support, transportation, companionship, health outreach, and resource development. In addition, RSVP participants are eligible for reimbursement of expenses such as transportation and meals while volunteering, and are protected by medical indemnity and life insurance as well.

For last year's refunding application, the AmeriCorps Seniors RSVP grant opportunity allowed applicants to identify the most urgent needs in their community and engage volunteers who bring a lifetime of skills, knowledge and lived experience to their volunteer commitments, which range from a few hours to 40 hours per week. LIFT CAA proposed programming to address a variety of community needs and counteract risk factors that contribute to overall poor health, including providing companionship outreach, provision of meals to vulnerable populations, transportation and care coordination, and coordinating/assisting with prevention, harm reduction and health education programming. These interventions aligned with the Funding Priorities of "Supporting Older Adults and their Caregivers" and "Supporting Behavioral Health Initiatives".

With the Board's approval, we are requesting $107,100 in grant funding from AmeriCorps. This amount will fund a large portion of the Retired and Senior Volunteer Program for one year, during the second year of the three-year grant period. Expenses covered through this grant amount will include program personnel salaries, fringe benefits, indirect costs, travel, supplies, volunteer support expenses, and other programmatic costs.

The grant application is due January 8, 2025.

Funding Entity: **U.S. Department of Health and Human Services, Health Resources and Services Administration**
Funding Opportunity: **FY 2026 Healthy Start Initiative: Eliminating Disparities in Perinatal Health Grant Application (Continuation, Year 13)**
Amount Requested: **$1,100,000**

The Health Resources and Services Administration, Maternal and Child Health Bureau, Division of Healthy Start and Perinatal Services, is accepting continuation applications for the Healthy Start Initiative: Eliminating Disparities in Perinatal Health program. The purpose of this grant program is to improve health outcomes before, during, and after pregnancy and reduce the well-documented racial/ethnic differences in rates of infant death and adverse perinatal outcomes.

The Healthy Start Program supports communities and populations experiencing the greatest disparities in maternal and infant health outcomes. The program has two focus areas: 1) providing direct and enabling services (screening and referrals, case management and care coordination, health and parenting education, and linkage to clinical care) to enrolled Healthy Start participants; and 2) convening Community Consortia (formerly known as Community Action Networks) comprised of diverse, multi-sector partners to advise and inform Healthy Start activities as well as to develop and implement plans to improve perinatal outcomes within the selected project area. Healthy Start also works to address social determinants of health, such as access to adequate food, housing, and transportation, to improve disparities in maternal and infant health outcomes.

With the Board's approval, we are requesting $1,100,00 from the U.S. Department of Health and Human Services, Health Resources and Services Administration for Year 13 of the grant project. If awarded, this funding will be used to fully support the Healthy Start Program within Atoka, Choctaw, Coal, Latimer, McCurtain, and Pushmataha Counties for a period of one year. The project will continue to address the needs of women (especially those who are high-risk) and their families before, during, and after pregnancy. This will be achieved by placing emphasis on a community-based approach to providing care coordination, health education, counseling and supports. The anticipated benefit is the reduction of infant mortality, increased use of a primary medical home for mother and infant, and decreased co-factors which negatively impact pregnancy and the interconception period (smoking, drinking, substance use, domestic violence, and depression).

Choctaw Nation of Oklahoma Child Care Stabilization Grant Awards, Year 5 (1st Quarter):

Broken Bow Early Learning Center: $11,000

Hugo Early Learning Center: $7,000

1st Quarter Total: $18,000

CNO Payment Remittance Advice

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

Remittance Detail

Document Reference Number	Description	Date	Currency	Document Amount	Amount Withheld	Discount Taken	Amount Paid
AB1017002110012025	477 - ARPA STABILIZATION GRANT 5TH YEAR - 1ST QUARTER OCTOBER 2025 - DECEMBER 2025	10/01/2025	USD	7,000.00	0.00	0.00	7,000.00
AB1017002210012025	477 - ARPA STABILIZATION GRANT 5TH YEAR - 1ST QUARTER OCTOBER 2025 - DECEMBER 2025	10/01/2025	USD	11,000.00	0.00	0.00	11,000.00
				Total	0.00	0.00	18,000.00

OKLAHOMA

Purchase Order

CHANGE ORDER **Dispatch via Print**

Purchase Order	Date	Revision	Page
3409027458	02/07/2025	2 - 10/16/2025	1

Payment Terms	Freight Terms	Ship Via
45 Days	Free on board at Destination	Common

Buyer	Phone/Email	Currency
Johnathan Jackson	**405/426-8007**	USD

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

Ship To: OKLAHOMA STATE DEPT OF HEALTH
ACCOUNTS PAYABLE
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

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
1- 1	93140000 /	FY25/26 Term: 12/1/24-11/30/25 - Year 1 of 3 -Choosing Childbirth Act - grant funded by SB 538	1.0000	EA	800,000.0000	800,000.00	11/30/2025
Attn:	Stephanie Spencer						
2- 1	**93140000 /**	FY26/27: 12/01/25 - 11/30/26 - Year 2 of 3 - CCB LIFT Choosing Childbirth Grant Recipient SB538 to provide information, counseling, education and support services to pregnant women or women who believe they may become pregnant and children zero to three.	**1.0000**	**EA**	**800,000.0000**	800,000.00	**11/30/2025**
Attn:	Zachary Reeder						

Total PO Amount 1,600,000.00

COMMENTS:
100% State Funded SB538 Choosing Childbirth Grant Pass-Thru Sub-Recipient
63 OK Stat § 1-740.17

Initial Year Grant Agreement dates: 12/01/24 to 11/30/25
With the possibility of renewing additional years

OSDH Contract Monitor: Stephanie Spencer Stephanie.Spencer@health.ok.gov, 405-426-8437

Vendor Contact: Rebecca Porter, becky.reynolds@liftca.org, 580-326-1225

Please send all invoices to: OSDH.AccountsPayable@health.ok.gov &
OSDH.GrantsManagement@health.ok.gov &
Stephanie.Spencer@health.ok.gov

Notice to Vendor: By acceptance of this purchase order, vendor agrees to ship/provide the quantities/items listed and invoice at the stated prices.

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.

Authorized Signature

Purchase Order

OKLAHOMA

CHANGE ORDER **Dispatch via Print**

Purchase Order		Date	Revision	Page
3409027458		02/07/2025	2 - 10/16/2025	2
Payment Terms	**Freight Terms**			**Ship Via**
45 Days	Free on board at Destination			Common
Buyer		**Phone/Email**		**Currency**
Johnathan Jackson		**405/426-8007**		USD

Department of Health

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

Ship To: OKLAHOMA STATE DEPT OF HEALTH
ACCOUNTS PAYABLE
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

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

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.

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.

Funding: due to possible future reductions in state and/or federal appropriations, the department cannot guarantee the continued availability of funding for this contract, notwithstanding the consideration stated above. In the event funds to finance this contract become unavailable, either in full or in part, due to such reductions in appropriations, the department may terminate the contract or reduce the considerations upon notice in writing to vendor. The department shall be the final authority as to the availability of funds. In the event of non-appropriation or discontinuance of funding for this contract, the vendor will be paid for products and/or services provided up to the effective date of termination.

C/O #1: Added Year 1 of 3 to the description. md 2/24/25
C/O #2: Changed buyer name from MDUKE to JJACKSON07; Add line 2 for year 2 of 3; JBJ 10/16/25

Authorized Signature

Funding Entity: **Oklahoma Department of Education**
Funding Opportunity: **Child and Adult Care Food Program Grant**
Award Amount: **$2,222,403.54**
Agency Programs: **Head Start/Early Head Start Programs; Early Learning Centers; Child and Adult Care Food Program**

The Child and Adult Care Food Program (CACFP) is a Federal program that provides reimbursements for nutritious meals and snacks to eligible children and adults who are enrolled for care at participating child care centers, day care homes, and adult day care centers. CACFP also provides reimbursements for meals served to children and youth participating in afterschool care programs, children residing in emergency shelters, and adults over the age of 60 or living with a disability and enrolled in day care facilities. CACFP contributes to the wellness, healthy growth, and development of young children and adults in the United States. Funding is provided to the Oklahoma State Department of Education (the state sponsoring agency) from the United States Department of Agriculture based on claims submitted by program participants.

LIFT Community Action Agency has operated a stand-alone Child and Adult Care Food Program since 1984 and currently provides the program in 37 counties in Oklahoma. Through this program, our agency provides daycare home providers with training in nutrition, child development, safety, and sanitation. The program also provides daycare home providers with a reimbursement check based on meals served, up to a maximum of two main meals and one snack per child per day. This ensures that the children in these daycare homes receive nutritious meals. By providing free and low-cost food to child care providers, CACFP helps to ensure that children are well fed, able to concentrate, and ready to learn. As a result, providers in the program are being reimbursed for meals served to more than 3,000 children daily.

In addition, LIFT CAA's Head Start, Early Head Start, and Early Learning Centers provide the children they serve with well-balanced meals and snacks each day with support from the Child and Adult Care Food Program. This program not only promotes good nutrition and healthy development but also supports families by ensuring that children receive consistent access to high-quality, USDA-approved meals while in our centers.

We are requesting the Board's approval to accept a joint 2025-2026 Grant Award for the Child and Adult Care Food Program from the Oklahoma Department of Education. The combined award will provide up to $2,222,403.54 in funding and encompass the three components of LIFT CAA's programming:

- Daycare Home Sponsorship – funding to support personnel and other program operations expenses, including training for daycare home providers, site visits for monitoring and technical assistance, and reimbursement of food costs for participating providers across the state *(up to $1,372,513.37 for Program Operations and Daycare Home Meal Reimbursement)*;
- Head Start/Early Head Start Programs – funding to partially reimburse the costs of meals and snacks served to children enrolled in 18 Head Start classrooms and 3 Early Head Start centers, covering food, milk, food-related supplies, and a portion of cooks' salaries/benefits (*up to $721,000);*
- Early Learning Centers (Antlers, Broken Bow, Hugo, Idabel) – funding to partially reimburse the costs of meals and snacks served to children enrolled in the four agency-operated centers (*up to $128,890.17)*.

LIFT Community Action, Inc. **WAP-2025-LIFT CAA-00007**

Contract Part I: 19795 DOE 25

FAIN #: SE-0001845 UEI #: XL9DVU1YDGU2 FEI #: 730772321

CONTRACT
PART I
SUMMARY AND SIGNATURES

Contracting Agency:	Oklahoma Department of Commerce State of Oklahoma (ODOC)
Contractor:	LIFT Community Action Agency, Inc.
Contract Title:	ODOC Weatherization Assistance Program - DOE
Contract Number:	19795 DOE 25
Federal Amount:	$517,953.00
Match Amount:	
Contract Amount:	$517,953.00
Research and Development:	Not R&D Related
Indirect Cost Rate:	28.38
Grant Award Amount - This Action:	$517,953.00
Total Committed:	$517,953.00
Total Obligated:	$517,953.00
Source:	Department of Energy (DOE) Weatherization Assistance Program. Catalog of Federal Domestic Assistance (CFDA) Number 81.042
Project Funding Period:	April 1, 2025 through March 31, 2026
Federal Award Period:	April 1, 2025 through June 30, 2028

Summary of Project

Budget Summary

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

Contract Part I: 19795 DOE 25

Submit Requisitions to: Community Development Oklahoma Department of Commerce 900 North Stiles Oklahoma City, OK 73104-3234	Issue Payment To: LIFT Community Action Agency, Inc. 209 North 4th Street Hugo, OK 74743-3809
AGREEMENT COMPONENTS:	Part I - Summary and Signatures Part II - Terms and Conditions Certification Regarding Lobbying

SPECIAL CONDITIONS:

SIGNATURES – EXECUTION OF CONTRACT

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

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

Executed by: LIFT Community Action Agency, Inc. Sheree Ensley	Executed by: Oklahoma Department of Commerce Marshall Vogts
Signature of Authorized Official	Signature of Authorized ODOC Official
11/21/2025	11/24/2025
Date	Date

Department of Health and Human Services

Administration for Children and Families

Notice of Award

Award# 06CH012393-03-00
FAIN# 06CH012393
Federal Award Date: 11/26/2025

Recipient Information

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

2. Congressional District of Recipient
02

3. Payment System Identifier (ID)
1730772321A1

4. Employer Identification Number (EIN)
730772321

5. Data Universal Numbering System (DUNS)
095453171

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

7. Project Director or Principal Investigator
Mrs. Rebecca Reynolds
Executive Director
becky.reynolds@liftca.org
580-326-3351

8. Authorized Official
Mr. William Smith
Governing Board Chairman
boardchair@liftca.org
(580) 326-3351

Federal Agency Information
ACF/OHS Region VI Grants Office

9. Awarding Agency Contact Information
Mr. Christopher Moye
Grants Management Specialist
Christopher.Moye@acf.hhs.gov
2028045313

10. Program Official Contact Information
Mrs. Tatia Long
Regional Program Director
Office of Head Start
tatia.long@acf.hhs.gov
2147678825

Federal Award Information

11. Award Number
06CH012393-03-00

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

13. Statutory Authority
42 USC 9801 ET SEQ

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

15. Assistance Listing Number
93.600

16. Assistance Listing Program Title
Head Start

17. Award Action Type
Non-Competing Continuation

18. Is the Award R&D?
No

Summary Federal Award Financial Information

19.	**Budget Period Start Date** 12/01/2025 **- End Date** 11/30/2026	
20.	**Total Amount of Federal Funds Obligated by this Action**	$4,614,531.00
	20a. Direct Cost Amount	$4,003,746.00
	20b. Indirect Cost Amount	$610,785.00
21.	Authorized Carryover	$0.00
22.	Offset	$0.00
23.	Total Amount of Federal Funds Obligated this budget period	$0.00
24.	**Total Approved Cost Sharing or Matching, where applicable**	$1,153,633.00
25.	**Total Federal and Non-Federal Approved this Budget Period**	$5,768,164.00
26.	**Period of Performance Start Date** 12/01/2023 **- End Date** 11/30/2028	
27.	Total Amount of the Federal Award including Approved Cost Sharing or Matching this Period of Performance	$17,304,492.00

28. Authorized Treatment of Program Income
ADDITIONAL COSTS

29. Grants Management Officer – Signature
Ms. Bridget Shea Westfall
Supervisory Grants Management Specialist

30. Remarks

Department of Health and Human Services

Administration for Children and Families

Notice of Award

Award# 06CH012393-03-00
FAIN# 06CH012393
Federal Award Date: 11/26/2025

Recipient Information

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

Congressional District of Recipient
02

Payment Account Number and Type
1730772321A1

Employer Identification Number (EIN) Data
730772321

Universal Numbering System (DUNS)
095453171

Recipient's Unique Entity Identifier (UEI)
XL9DVU1YDGU2

31. Assistance Type
Discretionary Grant

32. Type of Award
Service

33. Approved Budget
(Excludes Direct Assistance)

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

a. Salaries and Wages	$2,632,693.00
b. Fringe Benefits	$963,953.00
c. Total Personnel Costs	$3,596,646.00
d. Equipment	$0.00
e. Supplies	$47,590.00
f. Travel	$10,386.00
g. Construction	$0.00
h. Other	$308,724.00
i. Contractual	$40,400.00
j. TOTAL DIRECT COSTS	**$4,003,746.00**
k. INDIRECT COSTS	**$610,785.00**
l. TOTAL APPROVED BUDGET	**$4,614,531.00**
m. Federal Share	**$4,614,531.00**
n. Non-Federal Share	**$1,153,633.00**

34. Accounting Classification Codes

FY-ACCOUNT NO.	DOCUMENT NO.	ADMINISTRATIVE CODE	OBJECT CLASS	ASSISTANCE LISTING	AMT ACTION FINANCIAL ASSISTANCE	APPROPRIATION
6-G664122	06CH01239303	ACFOHS	41.51	93.600	$4,555,271.00	75-26-1536
6-G664120	06CH01239303	ACFOHS	41.51	93.600	$39,956.00	75-26-1536
6-G664121	06CH01239303	ACFOHS	41.51	93.600	$19,304.00	75-26-1536

30. REMARKS (Continued from previous page)

Under Section 638 of the Head Start Act, this action awards LIFT COMMUNITY ACTION AGENCY, INC. funds for the budget period of 12/01/2025-11/30/2026 within the project period of 12/01/2023-11/30/2028 for the operation of a Head Start Preschool and Early Head Start program in the designated service area(s).

The annual funding levels based on the application submitted for this period are $3,296,148 for Head Start Preschool operations; $1,259,123 for Early Head Start operations; $39,956 for Head Start Preschool training and technical assistance; and $19,304 for Early Head Start training and technical assistance.

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

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

This grant is subject to the requirements included in Attachment 1.

This action approves the grantee agency to serve medically underserved areas in accordance with Sec. 645 [U.S.C. 9840] (a) (A) - (D) of the Head Start Act for Garvin (McCurtain County); Boswell, Fort Towson, and Soper (Choctaw County); Rattan (Pushmataha County).This Community meets the following requirements: a population of 1,000 or less individuals, have no other preschool programs, and are in a medically underserved and health professional shortage area. This designation allows your agency to enroll over-income children within these communities, not to exceed 50% of the funded enrollment. This information must be submitted and approved each Program Year with the refunding application.

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

Bank Of America

00000082/51

PAY thirteen thousand and 00/100

NOT VALID AFTER 180 DAYS

DATE 12/2/2025

$ ***$13,000.00

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

VOID

****ACH PAYMENT****

NeighborWorks America 00000082/51

LIFT Community Action Agency, Inc. 12/2/2025

Date	INVOICE	Memo	Orig. Amt.	Amt. Due	Amount
12/1/2025	54328		$13,000.00	$13,000.00	$13,000.00
					$13,000.00

PLEASE DETACH AND RETAIN FOR YOUR RECORDS

WHISTLEBLOWER POLICY
LIFT COMMUNITY ACTION AGENCY, INC.
EFFECTIVE DECEMBER 9, 2025

PURPOSE

This policy is formulated to provide employees opportunity and process to access their Program Director, Associate Director, Executive Director and/or Finance/Audit Committee in the event that the employee believes they have observed unethical and improper practices or any other wrongful conduct in the Agency and to prohibit managerial personnel from unlawfully retaliating against those employees.

No adverse personnel action of any kind shall be taken or recommended against an employee in retaliation for his or her disclosure of any unethical and improper practices or alleged wrongful conduct. However, this policy does not protect an employee from an adverse action which occurs independent of their disclosure of unethical and improper practice or alleged wrongful conduct, and is based on poor job performance, poor work related behavior, misconduct, violation of agency policy or procedure or any other basis unrelated to a disclosure made pursuant to this policy.

POLICY

LIFT Community Action Agency, Inc. is firmly committed to the highest standards of ethical conduct, professionalism and high quality. These concepts are constant priorities that are upheld in the behavior of each individual associated with the Agency.

The Agency welcomes and encourages the reporting of policy compliance concerns. Reporting assists the Agency in its obligation to maintain compliance with all laws, regulations, grant and contract requirements, standards, policies, and procedures. This Policy applies to all Agency directors, employees and volunteers. Any such individual is encouraged to, in good faith, report anything he or she believes evidences a (1) violation of law, (2) violation of Agency policy, (3) mismanagement, (4) waste or misuse of Agency and/or grant funds, or (5) an abuse of authority, collectively referred to herein as “alleged wrongful conduct.”

Reporting:

Individuals should make a prompt and timely disclosure after becoming aware of the alleged wrongful conduct. In order to allow the Agency an opportunity to review alleged wrongful conduct and to take necessary internal corrective action, individuals are encouraged to report in writing alleged wrongful conduct to the Program Director, Associate Director, or, in case it involves Managerial Personnel, to the Executive Director and, in matters involving the Executive Director, to the Finance/Audit Committee immediately after becoming aware of the same. However, there is no need to follow chain of command and an employee can make a report directly to the Executive Director or the Finance/Audit Committee at any time. Timely reports are necessary so that an Agency investigation can be promptly initiated. If a reporting individual is unwilling or unable to put an oral disclosure in writing, the Agency official who investigates the disclosure will prepare a written summary of the disclosure and provide a copy to the appropriate party, who may edit the summary for accuracy and completeness.

Confidentiality:

Individuals who report in good faith possible compliance issues will be accorded confidentiality and/or anonymity to the extent possible under the law. Similarly, the person accused of alleged wrongful conduct will be accorded confidentiality to the extent possible under the law and except for those persons having a need to know the identity of the person accused. The identity of the reporting individual and the person accused may become known during the normal course of the investigation.

Investigation:

The investigation of compliance issues is the ultimate responsibility of the Executive Director or, in exceptional cases, the Finance/Audit Committee. The Executive Director and/or the Finance/Audit Committee or their designee will be responsible for:

- Ensuring all investigations are carried out in a fair and unbiased manner.
- Ensuring that those making complaints and/or reporting compliance concerns are treated fairly, their confidentiality is protected to the extent the investigation and the law allows, and no retaliation takes place.

No Retaliation:

No person who reports alleged wrongful conduct shall suffer harassment or retaliation. An employee who retaliates against someone who reported alleged wrongful conduct will be subject to discipline up to and including termination of employment. The Whistleblower Policy is intended to encourage and enable employees and others to raise serious concerns within the Agency prior to seeking resolution outside the Agency.

False Allegations of Wrongful Conduct:

Any employee who knowingly makes false allegations of alleged wrongful conduct shall be subject to discipline, up to and including termination of employment, in accordance with Agency rules, policies and procedures.

Annual Affirmation:

The Agency shall annually affirm that it has not denied any personnel access to the Finance/Audit Committee and that it has provided protection to any "whistleblower" from adverse personnel action. The affirmation shall be signed by the Executive Director and kept on file by the Compliance Officer.

Pilot Program for Enhancement of Employee Whistleblower Protection (41 U.S.C. 4712)

The federal government has enacted a pilot program, effective until January 1, 2017, to add protections for employees against reprisal for certain whistleblowing activities in connection with federal grants and contracts.

The pilot program is established at 41 U.S.C. 4712 by section 828 of the National Defense Authorization Act for Fiscal Year 2013 (Pub. L. 112-239) and Federal Acquisition Regulation

3.908. While the provisions of the program are summarized below, more detailed information about rights and remedies under the program may be found by consulting the establishing materials at:

http://uscode.house.gov/view.xhtml?req=(title:41%20section:4712%20edition:prelim)

and

http://spa.columbia.edu/files_sponsoredprojects/imce_shared/Whistleblower_FAR_3_908__00193229x9672E_.pdf.

Under the program, employers cannot discharge, demote, or otherwise discriminate against an employee as a reprisal for disclosing information (except for classified information) that the employee reasonably believes is evidence of any of the following:

- A gross mismanagement of a federal contract or grant;
- A gross waste of federal funds;
- An abuse of authority relating to a federal contract or grant (where "abuse of authority" is defined as an "arbitrary and capricious exercise of authority that is inconsistent with the mission of the executive agency . . . or the successful performance of a [federal] contract or grant . . . .")
- A substantial and specific danger to public health or safety; or
- A violation of law, rule, or regulation related to a federal contract (including competition for or negotiation of a contract) or grant.

The pilot program covers only those employees who disclose these types of information to certain people or entities, identified as:

- A member of Congress or a representative of a committee of Congress;
- An Inspector General;
- The Government Accountability Office;
- A federal employee responsible for contract or grant oversight or management at the relevant federal agency;
- An authorized official of the Department of Justice or other law enforcement agency;
- A court or grand jury; or
- A management official or other employee of LIFT CAA, Inc. who has the responsibility to investigate, discover, or address misconduct.**

In addition, the pilot program covers an employee who initiates or provides evidence of misconduct in any judicial or administrative proceeding relating to waste, fraud, or abuse on a federal contract or grant.

Finally, the pilot program provides a process for whistleblowers to file complaints with federal agencies if they believe they were discriminated against for their disclosure of information, provided those complaints are submitted within three years of the date of the alleged discrimination.

Whistleblowers may submit complaints to the Inspector General of the federal agency involved. The Inspector General will generally perform an investigation and submit a report to the federal agency, which then determines whether sufficient basis exists to conclude that discrimination occurred. If the agency determines that discrimination has occurred, the pilot program sets out remedies that may be available, including ordering an institution to reverse the reprisal, reinstate the employee with compensatory damages and employment benefits, and/or pay costs reasonably incurred by the whistleblower in bringing the complaint. The institution has the right to appeal any agency order to the relevant United States court.

**LIFT Community Action Agency, Inc. is committed to operating with integrity and in full compliance with all applicable laws, regulations, and policies, and it does not tolerate retaliation against individuals who report compliance concerns in good faith. There are a number of resources available to individuals who have such a concern. You may be able to discuss the concern with a supervisor, Associate Director, the Compliance Officer, Human Resources Director or the Executive Director. Any employee with concerns of any kind stemming from possible noncompliance or irregularities may also report them online at www.liftca.org anonymously and without fear of retaliation.

The above LIFT CAA, Inc. Whistleblower Policy and Pilot Program for Enhancement of Employee Whistleblower Protection (41 U.S.C. 4712) having been presented to the LIFT CAA, Inc. Board is approved and adopted on this _______ day of _________________, ________.

_______________________________ _______________________________

William Smith, Board Chairman
LIFT CAA, Inc.

Date Adopted by LIFT CAA, Inc. Board

WHISTLEBLOWER POLICY ATTESTATION

I, ____ (name printed) acknowledge that I received a written copy of the LIFT CAA, Inc. Whistleblower Policy and Pilot Program for Enhancement of Employee Whistleblower Protection (41 U.S.C. 4712) consisting of five (5) pages (including the Attestation) on this day. I further acknowledge that I have read and understand the Policy and Pilot Program.

I understand a copy of the Pilot Program for Enhancement of Employee Whistleblower Protection (41 U.S.C. 4712) can be found at the end of the current LIFT CAA, Inc. Whistleblower Policy which can be viewed at any time at www.liftca.org, LIFT CAA, Inc.'s employee website or a printed copy can be requested from the LIFT CAA, Inc. Administration Office, 209 N. 4th Street, Hugo, Oklahoma 74743 by contacting LIFT CAA, Inc. Human Resources.

____
Employee Name Printed

________________________________ ________________________________
Employee Signature Date of Employee Signature

____
Witness Name Printed

________________________________ ________________________________
Witness Signature Date of Witness Signature

Americans with Disabilities Act Policy

For

LIFT Community Action Agency, Inc.
LIFT Transit

Approved By: Little Dixie Community Action Agency, Inc. Board of Directors

Accepted Date: February 13, 2018

I. Goal

It is the goal of ***LIFT Transit***, through its (demand response) rural public transit service, to design, implement and maintain an efficient and effective transportation system for persons with disabilities. ***LIFT Transit*** works to ensure nondiscriminatory transportation in support of the Federal Transit Administration's mission to enhance the social and economic quality of life for all Americans.

II. Policy

It is the policy of ***LIFT Transit*** to abide by all provisions of the Americans with Disabilities Act (ADA) of 1990, Section 504 of the Rehabilitation Act of 1973 and US Department of Transportation (DOT) implementation regulation found at 49 CFR Parts 27, 37, and 38, as amended; in the delivery of transit services that are open to the public and prohibits discrimination on the basis of disability and sets specific requirements that transit agencies must follow.

III. ADA Requirements

- Equivalent Service

LIFT Transit provides demand response rural public transportation and provides equivalent service to individuals with disabilities, which is consistent with DOT ADA 49 CFR Part 37.77. This transportation will be provided in the most integrated setting appropriate to the needs of the individual and will be equivalent to the service provided other individuals with respect to:

- Response time;
- Fares;
- Geographic area of service;
- Hours and days of service;
- Restrictions or priorities based on trip purpose;
- Availability of information and reservations capability;
- Any constraints on capacity or availability;

-General Service Requirements

a. Training

LIFT Transit shall ensure that personnel are trained to proficiency, as appropriate to their duties, so that they operate vehicles and equipment safely and properly assist and treat individuals with disabilities who use the service in a respectful and courteous way, with appropriate attention to the differences among individuals with disabilities.

b. Service Animals

~~The **LIFT Transit** shall permit animals to accompany individuals with disabilities in vehicles and facilities. Under the Americans with Disabilities Act of 1990, a service animal is defined as *"any guide dog, signal dog, or other animal that is individually trained to do work or perform tasks for an individual with a disability, including but not limited to, alerting individuals with impaired hearing to intruders or sounds, providing minimal protection or rescue work, pulling a wheelchair, or fetching dropped items."* 49 CFR Part 37.3~~ *Service animals will be transported with their owners without restriction or extra cost. Service animals must be supervised and the owner/handler must retain full control of the animal at all times. Owners/handlers are responsible for cleanup of any waste or litter caused by the service animal and is liable for any damages the animals cause. Drivers and dispatchers will accept the rider's statement that the passenger's animal is a service animal. Personnel may ask riders two questions: (1) is the animal a service animal required because of a disability? and (2) what work or task has the animal been trained to perform?*

A service animal is defined as "any guide dog, signal dog, or other animal individually trained to work or perform tasks for an individual with a disability, including, but not limited to, guiding individuals with impaired vision, alerting individuals with impaired hearing to intruders or sounds, providing minimal protection or rescue work, pulling a wheelchair, or fetching dropped items.

Department of Transportation (DOT)Americans with Disabilities Act (ADA)regulations at 49 C.F.R. Section 37.3)

~~Control of the service animal is the responsibility of the animal's partner. Any animal out of control will not be transported. If an animal's behavior creates a~~

~~hazard or direct threat, the accountability for damages or injuries shall remain with the person responsible for the animal.~~

~~Service animals should sit or lie on the floor. Animals should not occupy a passenger seat, and should not block the passenger aisle.~~

c. Transporting of Wheelchairs

Wheelchair Definition: A wheelchair is defined in Section 37.3 as “a mobility aid belonging to any class of three-or more-wheeled devices, usable indoors, designed or modified for and used by individuals with mobility impairments, whether operated manually or powered.”

LIFT Transit will accommodate mobility devices. Three or more wheeled devices, usable indoors, designed or modified for and used by individuals with mobility impairments, whether operated manually or powered, will be accommodated as long as the lift can accommodate the size and weight of the wheelchair and its user and there is space for the wheelchair on the vehicle. Mobility devices will not be transported if they are inconsistent with legitimate safety requirements.

d. Wheelchair Securement

Section 38.23(d) of the DOT’s ADA regulation requires all ADA compliant vehicles to have a two-part securement system: One to secure the mobility device and secondly a seatbelt and shoulder harness for the wheelchair user, complying with all applicable provision of Title 49 Part 571, (such seat belts and should harnesses shall not be used in lieu of a device which secures the wheelchair or mobility aid itself).

The Securement system shall limit the movement of an occupied wheelchair or mobility aid to no more than 2 inches in any direction under normal vehicle operation conditions. 49 CFR Part 38(d)(5)

All wheelchairs must be secured to the floor of the vehicle using the securement equipment.

e. Lift Deployment

Passengers will be permitted to use a lift or ramp to board or disembark from a vehicle at any designated stop, unless the lift or ramp cannot be deployed, the lift or ramp will be damaged if it is deployed, or temporary conditions preclude the safe use of the stop by all passengers. Standees should stand in the center of the platform facing the direction of travel. If capable, the passenger should hold both handrails when on the platform.

It is recommended that power chairs and scooters be turned to the "OFF" position once on the lift platform and while the lift is in operation.

f. Respirators and/or Portable Oxygen Equipment

Individuals with disabilities who use portable oxygen devices are allowed to travel with respirators and properly secured portable oxygen supplies. Oxygen supplies must not obstruct the aisle. 49 CFR Part 37.167(h)

IV. Passenger Responsibilities

a. All passengers must be able to sit in a bus seat or wheelchair in order to be transported.

b. All passengers on the vehicle are required to wear seat belts to include lap and shoulder belts. Therefore, persons in wheelchairs will also be required to be secured. Persons who, for medical reasons are unable to wear a safety belt, may request exemptions. To apply for this exemption, the person must submit a written application to the Commissioner of the Oklahoma Department of Public Safety requesting an exemption. Written verification from their physician, attesting to the need for the exemption, must be included. If the request is approved, a special notation will be placed on the person's driver's license to indicate the exemption from the safety belt law.

c. ***LIFT Transit*** will deny service to any individual who engages in violent, illegal conduct.

d. If a passenger's physical condition or conduct is hazardous, or whose behavior is seriously disruptive and/or a direct threat to others, service will be denied.

e. The passenger will be notified of his/her right to appeal the denial of service and ***LIFT Transit*** will hear the appeal as soon as reasonably possible.

V. Driver Responsibilities

a. Drivers are responsible for loading and unloading passengers

b. Drivers are not permitted to enter a passenger's home under and circumstance.

c. Drivers are not permitted to maneuver a wheelchair device up or down more than one step. This rule is provided for the safety of the passenger and the driver.

d. Drivers are not permitted to lift passengers.

e. Drivers will help passengers take lightweight items off the vehicle and set them on the curb. If additional assistance is required, this assistance may be rendered on a case-by-case basis.

VI. Personal Care Attendants and Companions

a. Personal care attendant (PCA's) are not required. If a PCA accompanies a passenger, the PCA will ride free of charge.

b. A companion (e.g., friend or family member) is not considered a personal care attendant unless the eligible individual regularly makes use of a personal care attendant and the companion is actually acting in that capacity.

c. During the reservation process, an individual must indicate whether he/she travels with a personal care attendant. If someone does not indicate the use of an attendant, then any individual accompanying him/her would be regarded as a companion.

VII. Effective Communication

a. ***LIFT Transit*** is committed to providing information about its services, policies and procedures to the public in accessible formats for persons with disabilities.

b. ***LIFT Transit*** shall provide a TTY number (or make use of an operator-assisted RELAY service) so that persons with hearing or speech impairments may communicate with and receive information from ***LIFT Transit*** Staff.

VIII. Reasonable Modification (49 CFR Parts 27 and 37)

A reasonable modification is a change to a policy, practice, or procedure that allows disabled individuals to have equal access to programs, services and activities. ***LIFT Transit*** will make reasonable modifications to policies, practices and procedures when necessary to ensure access to transit services for qualified individuals with disabilities, unless:

- Granting the accommodation would fundamentally alter the nature of the public transportation service.
- Making the accommodation would create a direct threat to the health or safety of other passengers.

- The individual with a disability is able to fully use ***LIFT Transit's*** service without the accommodation being made
- Where granting the request would cause an undue financial and administrative burden.

- **Requesting Reasonable Modifications**

LIFT Transit will provide information on how to make requests for reasonable modifications. This information will be readily available and easily accessible to the public through ***LIFT Transit's*** website/brochure and policy guidelines.

Requests for accommodation can be submitted in written format by contacting us at:

Jeannie.McMillin@liftca.org

or by phone or mail at:

LIFT Transit

209 North 4th Street

Hugo, OK 74743 or

(580)326-8176

- **Processing/Granting/Denying Modification Requests**

LIFT Transit will process reasonable modification requests within 48 hours of receiving a request. As soon as a determination regarding reasonable accommodation has been made, that decision will be promptly communicated to the individual. In the event that a request for reasonable accommodation will be denied, ***LIFT Transit*** will communicate the denial to the individual requesting modification.

IX. Public Involvement

LIFT Transit is committed to providing on-going mechanisms in accessible formats to involve the public in decisions regarding its accessible services, proposed fare increases, policies and procedures, and other similar topics.

X. Complaint Procedure

Any person who believes she or he has been discriminated against, or who has a concern, may file a formal complaint. ***LIFT Transit*** provides instructions for filing a complaint on the agency website at www.liftca.org. Complaints can be submitted by e-mail or in writing or by phone. When a complaint is received, documentation is kept concerning the nature, date and time of the complaint. Every complaint will be investigated within 10 days after receipt. After LIFT Transit investigates the complaint, a decision will be rendered in writing to the complainant.

If the complainant disagrees with the finding of ***LIFT Transit***, an opportunity to appeal the decision may be pursued. An appeal should be filed within 21 Days of the initial decision by ***LIFT Transit***. The appeal must be filed in writing and must provide detailed information from the complainant.

In the event of an appeal, the investigating official will then follow the appeal process which includes interviewing individuals with relevant information and providing the complainant the ability to present additional evidence. The investigating official will then present the appeal information to the LIFT Community Action Agency, Inc. Executive Director. A decision regarding the appeal will be made by the LCAA Executive Director. The LCAA Executive Director's decision will be provided to the petitioner in writing within 30 days.

XI. Designated Employee

LIFT Transit's designated official responsible for processing reasonable modification requests and handling complaints is:

Jeannie McMillin, Director
LIFT Transit
209 North 4th Street
Hugo, OK 74743
(580)326-8176
Jeannie.McMillin@liftca.org

LIFT COMMUNITY ACTION AGENCY, INC.
209 NORTH 4TH STREET
HUGO, OK 74743
(580) 326-3351

FINANCIAL SERVICES MANUAL
Board Approved 12/--/2025

CHAPTER 9

PAYROLL

Introduction

The LIFT Personnel Policies and Procedures Manual outlines Agency policy regarding hiring, promotion, sick leave, vacation, other fringe benefits, grievances, resignations, dismissals and other aspects relating to personnel policies. The Financial Services Manual will deal with the following:

Payroll processing
Time and attendance reporting
Payroll taxes and tax returns

The Human Resource staff will submit the necessary Personnel Action forms to the Accounting department.

The Human Resource staff will submit employee status changes to the Accounting department at least two days before payroll processing begins.

Payroll processing

In special circumstances, such as meeting Davis Bacon requirements, any employee may be paid weekly by applying an hourly rate for calculation purposes. This does not change the fringe benefits of the employee.

The time and attendance report should be forwarded to the Program Director on the 15th and the last business day of the month. The Program Director will review the timesheet for accuracy and forward to Accounting an original timesheet for all employees. Accounting personnel will verify addition of total hours on a test basis. The Accounting department will have up to five working days to prepare the bi-monthly paychecks. Ceridian (payroll processing/bank) requires at least two business days for processing direct deposits. Incomplete timesheets will be returned to the Program Director and late time sheets will be held until the following pay period.

Completing a Time and Attendance Report

For all employees, hours worked should be shown daily with a desription of duties. Holidays, annual leave, sick leave and administrative leave should be shown as zero in the hours worked column and recorded in the description. All payable hours should be totaled at the bottom of the form. Time and attendance reports are submitted through the use of the employee portal on accounting software, printed, signed, and forwarded for processing.

Posting of Cumulative Leave

Cumulative leave is posted after payroll processing is completed, and filed alphabetically by employee. See Personnel Policy Manual for further information on cumulative leave.

Payroll Taxes and Retirement Contributions

The third party payroll partner, Ceridian, processes the payroll tax reports as required providing LIFT with an electronic copy of the filings after quarter end. The Accounting department submits all employee and employer retirement contributions after each payroll is processed.

Overtime

Overtime will be paid when applicable, should be approved in advance when possible by the Executive Director as necessary for operation of a program. Overtime is paid from agency nonfederal funds, except when approved by the funding source to be paid from grant dollars.

CHAPTER 12

DOCUMENT RETENTION AND DESTRUCTION POLICY

1. Purpose

This policy provides for the systematic review, retention and destruction of documents received or created by LIFT Community Action Agency, Inc., in connection with the transaction of agency business. This policy covers all records and documents, regardless of physical form, and contains guidelines for how long certain documents should be kept and how records should be destroyed. The policy is designed to ensure compliance with federal and state laws and regulations, to eliminate accidental or innocent destruction of records and to facilitate the agency's operations by promoting efficiency and freeing up storage space.

2. Document Retention

LIFT follows the document retention procedures outlined below. Documents that are not listed but are substantially like those listed in the schedule will be retained for the appropriate length of time.

3. Corporate Records

Articles of Incorporation	Permanent
IRS Determination Letter	Permanent
By-Laws	Permanent
Fixed Asset Records	Permanent
Board Meeting Minutes/Resolutions	15 years
Board Finance/Audit/Loan committee Minutes	7 years
Grants/Contracts/Awards Documents	7 years
Annual Audits and Financial Statements	15 years
IRS 990 Tax Returns	15 years
IRS 1099 Records	7 years
IRS W2 Records	7 years
Affirmative Action Plan Document	7 years
General Ledgers	7 years
Journal Entries	7 years
Invoices/Credit Card Statements	7 years
Cash Receipts	7 years
Check Registers	7 years
Bank Deposit Slips	7 years
Bank Statements/Reconciliations	7 years
Electronic Fund Transfer Documents	7 years
Payroll Registers	7 years
Earnings Records	7 years

Payroll Tax Records	7 years
Garnishment Records	7 years
State Unemployment Tax Records	7 years
Personnel Files	7 years after termination
I-9 Forms	The latter of 3 years after hire or 1 year after termination
FMLA Documents	3 years
Employment Applications (non-hires)	2 years
Employment Applications (hired)	7 years after termination
Salary Schedules	7 years
Workers Compensation Accident Reports	7 years
OSHA Reports	7 years
Retirement Plan Documents	7 years after termination of plan
Time Sheets	7 years
Donor Records/Acknowledgement Letters	7 years
Appraisals	7 years
Insurance Policies	3 years after expiration
Real Estate Documents (Deeds/Abstracts)	until sale of property
Environmental Studies	7 years
Leases	5 years after expiration
General Contracts	5 years after termination
ADA Related Complaints	5 years

4. Electronic Documents and Records

Electronic documents will be retained as if they were paper documents. Therefore, any electronic files that fall into one of the document types on the above schedule will be maintained for the appropriate amount of time. If an email or online report pertains to a current grant or activity, the document should be printed in hard copy and kept in the appropriate file.

5. Emergency Planning

The agency's records will be stored in a secure and accessible manner. Documents and financial files essential to the operation of the agency in an emergency will be duplicated or backed up at least every week and taken offsite.

6. Document Destruction

LIFT's Executive Director is responsible for the ongoing process and may appoint staff to identify the records which have met the required retention period and oversee their destruction. Destruction of financial and personnel-related documents will be accomplished by shredding.

Document destruction will be suspended immediately upon any indication of an official investigation or when a lawsuit is filed. Destruction will be reinstated upon conclusion of the investigation or legal action.

7. Compliance

The failure of employees to follow this policy can result in possible civil and criminal sanctions against LIFT. and its employees and possible disciplinary action against responsible individuals. The Executive Director and Fiscal Officer will periodically review these procedures with legal counsel or the agency's certified public accountant to ensure that they are following new or revised regulations.

Income	2025 @ 11/30/2025		2026 Proposed budget
4000 - Contribution Revenue	**$80,061.04**	$4,003.05	$84,064.09
4100 - Inkind Revenue	**$816,729.47**	$40,836.47	$857,565.94
4200 - Miscellaneous Revenue	**$1,148,989.61**	$57,449.48	$1,206,439.09
4400 - State Revenue	**$3,449,007.61**	$172,450.38	$3,621,457.99
4500 - Federal Revenue	**$13,363,873.04**	$668,193.65	$14,032,066.69
4900 - Recoveries from Programs	**$3,557,122.29**	$177,856.11	$3,734,978.40
5000 - Rental Revenue	**$848,866.41**	$42,443.32	$891,309.73
5100 - Program Fee Revenue	**$1,235,264.04**	$61,763.20	$1,805,376.71
5300 - Interest and Dividends	**$105,786.81**	$5,289.34	$111,076.15
5400 - Revenue from other sources	**$1,187,352.62**	$59,367.63	$1,246,720.25
5800 - Special Event	**$20,987.30**	$1,049.37	$22,036.67
Total Income	**$25,814,040.24**		**$27,613,091.72**
Expense			
Expense			
7000 - Grants, contracts, & direct assistance	**$835,306.09**		$835,306.09
7200 - Salaries & related expenses	**$11,464,586.89**	$573,229.34	$12,037,816.23
7300 - Indirect Cost Pool Expense	**$1,691,649.37**	$84,582.47	$1,776,231.84
7500 - Contract/Consultant Services	**$1,724,714.07**	$86,235.70	$1,810,949.77
8100 - Non personnel expenses	**$1,045,483.92**	$36,591.94	$1,082,075.86
8110 - Office/Teaching Supplies			
8120 - Other/Maint Supplies			
8130 - Telephone & Internet			
8140 - Postage & shipping			
8170 - Printing & copying			
8190 - WX Materials			
8200 - Facility & equipment expenses	**$2,845,255.07**	$142,262.75	$2,987,517.82
8210 - Space Lease			
8220 - Electric			
8225 - Water			
8230 - Trash			
8235 - Sewer			
8240 - Natural Gas			
8260 - Repair/Maint for Building/Equip			
8265 - Construction Rehab & Renovation			
8300 - Travel & meetings expenses	**$534,292.13**	$0.00	$534,292.13
8400 - Insurance Expense	$1,975,902.95	$98,795.15	$2,074,698.10
8700 - Food Expenses	**$1,488,048.48**	$74,402.42	$1,562,450.90
8800 - In-Kind Expenses	**$816,729.47**	$40,836.47	$857,565.94
8500 - Other Expense	**$2,054,187.03**	$0.00	$2,054,187.03
8520 - Recognition			
8525 - Volunteer Travel			
8530 - Fees/Dues			
8540 - Training & TTA			
8550 - WX Health & Safety			
8560 - Computer & Software Related Expenses			
8570 - Advertising & Community Sponsorships			
8575 - Fundraising Expense			
8580 - Incentive Expense			
8585 - PROJECT EXPENSE			
8590 - Other Expenses			
8595 - Subsidy Expense			
Total Expense	**$26,476,155.47**		**$27,613,091.72**
			($0.00)

LIFT COMMUNITY ACTION AGENCY, INC.'S

Strategic plan

2026-2028

Board Approved:

December 9, 2025

EXECUTIVE SUMMARY

In 1968, three separate Community Action Agencies serving Choctaw, McCurtain, and Pushmataha Counties united to better address the needs of Southeast Oklahoma residents. LIFT Community Action Agency, Inc. — formerly known as Little Dixie Community Action Agency, Inc. — was officially incorporated as a nonprofit organization on April 4, 1968.

The agency's founding purpose, as outlined in its original Articles of Incorporation, was "to assist in developing, executing, and coordinating plans and programs authorized under the Economic Opportunity Act of 1964." Since its inception, the agency has continued to expand, adding new programs and services to meet the evolving needs of the region, with a strong focus on serving its most vulnerable populations.

To strengthen its strategic direction, LIFT Community Action Agency (LCAA) engaged Nationally Certified ROMA Implementer Kinsey Cox to lead a Strategic Planning Meeting—an essential step in setting priorities, defining goals, and establishing measurable objectives.

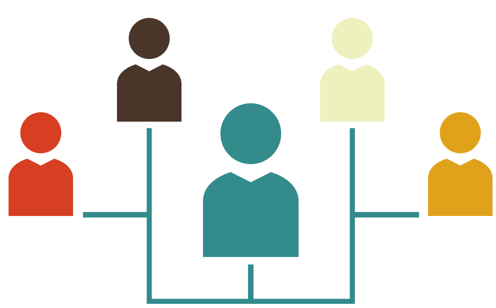
Key staff members involved in this process also participated in conferences and trainings led by the National Community Action Partnership. These sessions provided valuable instruction on incorporating the ROMA framework and ensuring the strategic plan aligns with Community Services Block Grant (CSBG) Organizational Standards.

The development of this plan involved multiple processes which included:

- In-depth review and analysis of Community Needs Assessment report.
- Review of the agency's Mission, Vision and Core Values.
- Survey collection and feedback from key stakeholders including front line staff, leadership and board.
- SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis activity with agency Board of Directors.
- Current environmental scan of the agency's service area.
- Review and analysis of 2024 Customer Satisfaction Surveys.
- Research of agency and community resources.

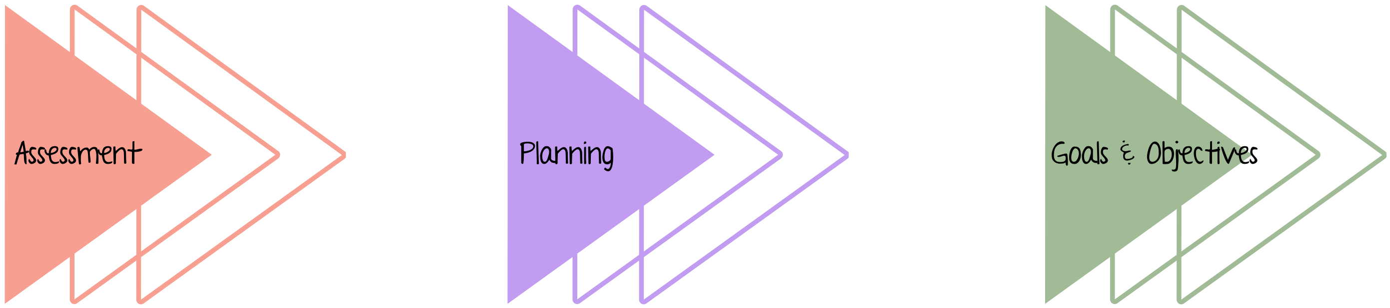
Each phase of the process involved a thorough review and analysis of both qualitative and quantitative data. These efforts informed the development of the strategies and benchmarks outlined in this plan.

Serving as a roadmap for the future, this Plan details the specific actions that LIFT Community Action Agency will implement over the next three years to address the needs identified in our most recent Community Needs Assessment (2025-2027).



STRATEGIC PLANNING PROCESS

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



Surveys, Focus Groups, Needs Prioritization, Environmental Scans and Community Meetings

Review of agency Mission, Vision, Values, SWOT Analysis, Results Oriented Management and Accountability (ROMA) Framework and Organizational Standards, current CNA, Environmental Scan and Stakeholder Interviews

Setting goals and determining objectives to establish the results to be achieved, determining specific outcome measures and deciding on a means to achieve the results

Assessment

The assessment phase involved a comprehensive survey process conducted from May 2024 through October 2024, during which 337 surveys were completed and collected. LIFT Community Action Agency utilized the Oklahoma Standardized Community Needs Assessment Survey to gather demographic information and identify needs as reported by local residents.

In addition to survey data, the agency incorporated information from customer satisfaction surveys, the U.S. Census Bureau, and other credible online databases to ensure a well-rounded analysis of community needs. Once all data were compiled, focus groups—comprising agency and community leaders, Board members, and frontline staff—met to prioritize the identified needs.

This prioritization process determined the top three community needs that will guide the agency's efforts over the next three years. To further engage the community, six meetings were held to discuss the causes and conditions of poverty, identify existing community resources, and develop potential strategies for addressing each need.

During these sessions, participants explored in depth how the causes and conditions of poverty relate to the top three prioritized needs, which were identified as follows:

- Housing: A shortage of safe, decent, and affordable housing exists across the service area.
- Transportation: There is a need for accessible and reliable transportation options.
- Youth Services: There is a lack of safe and consistent activities/programs for youth in the community.

Detailed findings and supporting data are available in the agency's most recent Community Needs Assessment Report, accessible on the LIFT Community Action Agency website at liftca.org.

Planning

Agency Review	SWOT Analysis	Org. Standards & ROMA	Community Needs Assessment
Revisited Agency Mission, Vision and Core Values; conducted stakeholder interviews	Conducted Strengths, Weaknesses, Opportunities and Threats activity with Board	Reviewed ROMA Model and Organizational Standards to ensure alignment with Strategic Plan	Reviewed 2025-2027 CNA Report; conducted updated environmental scan

AGENCY REVIEW

During the Board of Directors meeting held on October 11, 2022, members conducted a thorough review of the agency's Mission, Vision, and Core Values statements. The purpose of this review was to ensure that the language remained consistent with the agency's current programs and services. Following discussion and analysis, the Board voted to retain the existing statements without modification.

As part of the broader Agency Review process, stakeholder input was also gathered through interviews and surveys completed by both leadership and frontline staff. The information collected from these key stakeholders provided valuable insight to inform the development of the Strategic Plan.

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

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

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

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

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

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

SWOT ANALYSIS

The Board of Directors participated in a SWOT analysis activity, during which members individually identified the agency's strengths, weaknesses, opportunities, and threats. Following this exercise, the Board engaged in open discussion to review, group, and prioritize the responses within each category. Agency staff also conducted a separate SWOT analysis. The combined results of both groups are summarized below.

Internal

Strengths:

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

Weaknesses:

- Staff Turnover/Shortages
- Low Pay Scale
- Unskilled Workforce
- Lack of Volunteers

Helpful

External

Harmful

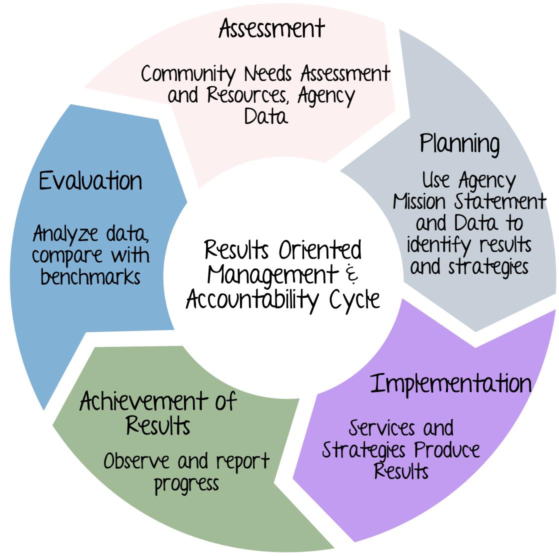
Opportunities:

- Multiple Marketing Platforms
- Partnerships
- Non-Profit Federal, State and Foundation Funding Streams
- Strong and Large Volunteer Base
- Community Support and Buy-in

Threats:

- Competition for Funding
- Government Changes
- Funding and Program Reductions and/or Cuts
- Inflation
- Loss of Experienced Staff

RESULTS ORIENTED MANAGEMENT & ACCOUNTABILITY (ROMA)



Strategic planning is a fundamental component and expression of the Results Oriented Management and Accountability (ROMA) framework. Within ROMA, it represents the second phase—Planning—yet the strategic planning process itself encompasses all five phases of the ROMA cycle. In this way, strategic planning not only fulfills one stage of the cycle but also embodies the continuous, results-driven nature of the entire ROMA process.

The ROMA framework and the Organizational Standards provide the structure and guidance for Community Action Agencies to achieve both their local community goals and the three overarching National Community Action Network Goals. These national goals represent the long-term outcomes that Community Action Agencies strive to accomplish for individuals, families, and communities with low income. The goals incorporated into LIFT's Strategic Plan align with and support the National Community Action Network Goals outlined below.

NATIONAL COMMUNITY ACTION NETWORK GOALS

Goal One:

Individuals and families with low incomes are stable and achieve economic security.

Goal Two:

Communities where people with low incomes live are healthy and offer economic opportunity.

Goal Three:

People with low incomes are engaged and active in building opportunities in communities.

ORGANIZATIONAL STANDARDS

The CSBG Organizational Standards establish essential minimum requirements to ensure that Community Action Agencies possess the capacity to effectively serve communities across the nation. Full implementation of these principles and practices strengthens the overall consistency and performance of the CSBG network.

Outlined below are the Organizational Standards set forth under the CSBG Act, which define the required components of the strategic planning process and emphasize the importance of evaluating both internal operations and community needs. The goals and objectives presented in this Strategic Plan reflect the agency's vision for the future while aligning with the expectations and requirements of the Organizational Standards.

Primary Organizational Standards for Strategic Planning

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

Other Organizational Standards related to Strategic Planning

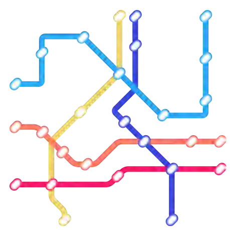
- OS 1.1 – The organization demonstrates low-income individuals' participation in its activities.
- OS 1.2 – The organization analyzes information collected directly from low-income individuals as part of the community assessment.
- OS 1.3 – The organization has a systematic approach for collecting,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

COMMUNITY NEEDS ASSESSMENT

As part of the strategic planning process, key leadership reviewed the findings and results from the 2025-2027 Community Needs Assessment. LIFT's Community Needs Assessment identifies and prioritizes the needs and available resources of individuals and families within our service area. Leadership uses this data to design effective, outcome-driven programs aimed at reducing poverty and improving overall well-being. A summary of the analyzed data is provided below.

Top 3 Prioritized Needs Identified

Housing



Transportation

Youth Services

337 Surveys Completed

Educational Community-12

Faith Based-10

Community Based-13

Government Entity-5

Private Organization-3

General Public-217

Client of the Agency (low-income)-64

Agency Board-10

Agency Volunteers-3

Poverty Statistics

21.64%	15.23%	12.53%
Service Area	State of Oklahoma	United States

Top 10 Needs Identified

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

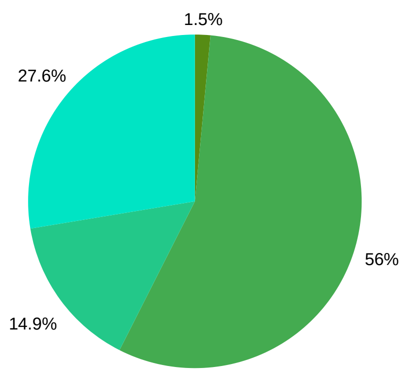
CUSTOMER SATISFACTION & INPUT

As part of the strategic planning process, the Board reviewed customer satisfaction data collected throughout 2024. Customer feedback serves as a vital component of the overall Strategic Plan, providing insight that ensures the plan fully reflects the principles of the ROMA cycle.

LIFT collects customer satisfaction surveys on an ongoing basis through both paper and online formats. All completed surveys are directed to the ROMA Coordinator and entered into the agency's database for analysis. The Board of Directors receives quarterly updates summarizing the number of surveys collected during the reporting period, the programs represented, response trends and percentages, and an analysis of internal and external factors that may influence the results.

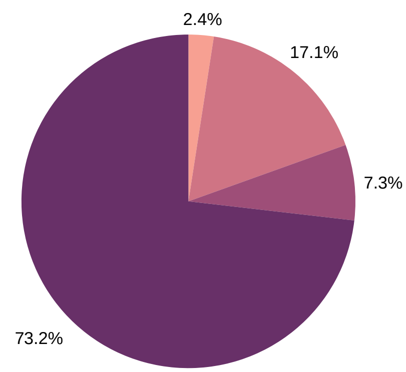
In total, 200 Customer Satisfaction Surveys collected in 2024 were reviewed and analyzed in comparison with the findings gathered during earlier phases of the planning process.

County Breakdown



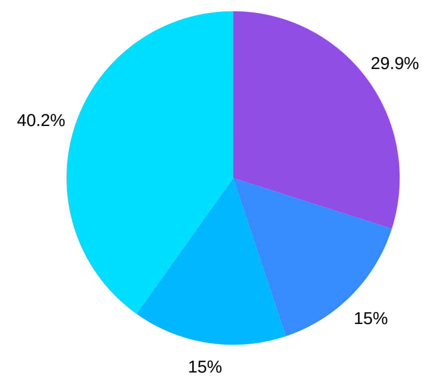
Choctaw County - 56%
Pushmataha County - 28%
McCurtain County - 15%
Other- 1%

Method of Awareness

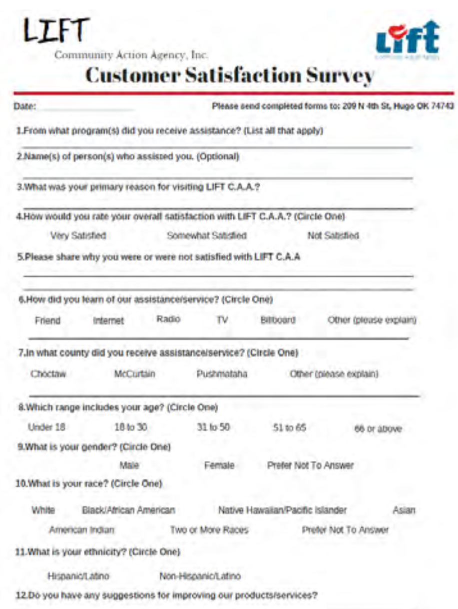


Billboard - 3%
Friend - 7%
Internet - 17%
Other - 73%

Age Breakdown



18 to 30 - 30%
31 to 50 - 15%
51 to 65 - 15%
66+ - 40%



LIFT
Community Action Agency, Inc.

Customer Satisfaction Survey

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

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

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

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

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

Very Satisfied   Somewhat Satisfied   Not Satisfied

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

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

Friend   Internet   Radio   TV   Billboard   Other (please explain)

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

Choctaw   McCurtain   Pushmataha   Other (please explain)

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

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

9.What is your gender? (Circle One)

Male   Female   Prefer Not To Answer

10.What is your race? (Circle One)

White   Black/African American   Native Hawaiian/Pacific Islander   Asian
American Indian   Two or More Races   Prefer Not To Answer

11.What is your ethnicity? (Circle One)

Hispanic/Latino   Non-Hispanic/Latino

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

GOALS & OBJECTIVES

Key leadership staff engaged the assistance of Nationally Certified ROMA Implementer, Kinsey Cox, to help determine priorities and establish organizational goals. Together, the group reviewed and discussed findings from the 2025-2027 Community Needs Assessment, Customer Feedback, Agency Review, and SWOT Analysis. Participants provided insights into the key findings from each of these sources, examining correlations, differences, and other contributing factors across the reports.

Through this collaborative process, the group developed Specific, Measurable, Achievable, Relevant, and Time-bound (SMART) goals and objectives to guide the agency's efforts in addressing the identified needs within the communities it serves.

PRIORITY NEEDS

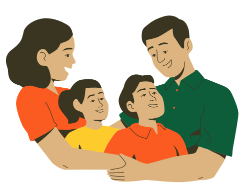
This Strategic Plan will identify activities and strategies for achieving the goals that align with the needs identified in the 2025-2027 CNA Report. The needs represent family, community and agency level needs. The focus of this Strategic Plan will be on program development and its direct relation to improving the lives of low-income individuals.

Need One: Families have a need for increased safe, decent and affordable housing.

Need Two: Our community has a need for safe, reliable and accessible transportation options to support daily living and access to essential services.

Need Three: Our community has a need for safe, reliable and developmentally appropriate youth services and activities.

Need Four: Our agency has a need to obtain additional facilities to house new or expanding programs, increase opportunities for client access, and better serve the needs of our communities.



Lift Community Action Agency

Goal 1: Family	Goal 2: Community	Goal 3: Community	Goal 4: Agency
To expand access to housing and supportive housing services for individuals and families within our service area	To enhance and expand transportation services that improve mobility, support independence, and ensure community members can access critical resources.	To expand and strengthen services that support positive development, increased access to activities, and promote the well-being of youth and families.	To increase facility capacity in order to expand services, house additional programs, and improve accessibility for individuals and families of low-income.

#1 Housing

Families have a need for increased safe, decent and affordable housing.

Goal

To expand access to housing and supportive housing services for individuals and families within our service area.

Objective 1	Objective 2	Objective 3
Increase availability of new single-family and multi-family housing units.	Expand the number of households receiving housing stabilization and/or preservation services.	Grow the pool of financial resources available to support homeownership and housing development.

Strategies	Measures & Benchmarks
Objective 1: Increase availability of new single-family and multi-family housing units. • Pursue grant and funding opportunities to support construction of single- and multi-family homes. • Strengthen partnerships with developers, municipalities, and housing organizations. • Assist households in becoming eligible for available housing programs.	• Apply annually for at least one federal or state-level housing development fund opportunity. • Complete construction of four single- and/or multi-family housing units by December 2028. • Establish or renew two new housing partnerships each year.
Objective 2: Expand the number of households receiving housing stabilization and/or preservation services. • Provide housing stabilization and prevention services for households with low to moderate incomes. • Offer assistance for minor repairs or rehabilitation projects that help maintain existing homes. • Support homeowners with resources and referrals for maintaining safe, secure housing.	• Deliver housing stabilization services (homeowner created, rental achieved) to 40 households each year. • Support 30 households annually with rehabilitation, maintenance, or preservation services. • Provide resources/referrals to 30 families annually by the end of each calendar year.
Objective 3: Grow the pool of financial resources available to support homeownership and housing development. • Develop new pathways and/or loan products to support homeownership. • Provide technical assistance to clients seeking mortgage approval or financial counseling. • Collaborate with lenders and community partners to increase funding availability for housing needs.	• Secure at least one new funding partnership or pathway to sustain and expand housing programs. • Increase access to mortgage loans for at least three new underserved clients each year. • Provide eligibility determination services to 30 families annually by the end of each calendar year.

#2 Transportation

Our community has a need for safe, reliable and accessible transportation options to support daily living and access to essential services.

Goal To enhance and expand transportation services that improve mobility, support independence, and ensure community members can access critical resources.

Objective 1
Increase access to transportation for individuals with limited mobility or inadequate transportation options.

Objective 2
Improve the quality, safety, and efficiency of transportation services.

Objective 3
Enhance transportation capacity through resource development and operational improvements.

Strategies	Measures & Benchmarks
Objective 1: Increase access to transportation for individuals with limited mobility or inadequate transportation options. • Expand transportation routes and/or service hours based on community need. • Promote transportation services through agency/program outreach, social media, and community events.	• Increase total transportation rides provided by 5% by December 2028. • Fully establish (six months of operation or more) 2 new route expansions or service hour extensions by December 2028.
Objective 2: Improve the quality, safety, and efficiency of transportation services. • Conduct regular vehicle inspections and maintain a scheduled preventative maintenance plan. • Provide annual training for drivers on safety, customer service, and accessibility needs. • Incorporate client feedback into service improvement planning.	• Maintain 100% completion of scheduled vehicle inspections annually. • Provide annual safety and service training for all transportation staff beginning 2026. • Implement a rider satisfaction survey with a goal of 75% positive feedback annually.
Objective 3: Enhance transportation capacity through resource development and operational improvements. • Apply for grants and funding opportunities to expand the fleet or upgrade existing vehicles. • Explore partnerships for co-funded transportation initiatives. • Improve scheduling systems to reduce wait times and increase efficiency.	• Secure at least one new funding source for transportation expansion by December 2028. • Add six additional vehicles to the fleet by December 2028. • Reduce average rider wait times by 5% by December 2028.

#3 Youth Services

Our community has a need for safe, reliable and developmentally appropriate youth services and activities.

Goal

To expand and strengthen services that support positive development, increased access to activities, and promote the well-being of youth and families.

Objective 1

Increase access to structured youth programs and activities.

Objective 2

Improve the quality and variety of youth service offerings.

Objective 3

Enhance community support systems that benefit youth development.

Strategies	Measures & Benchmarks
Objective 1: Increase access to structured youth programs and activities. • Develop and host a variety of youth-centered events and programs. • Partner with schools, community organizations, and local stakeholders to expand programming opportunities. • Promote youth services through outreach and social media.	• Host 4 youth-focused events or programming annually. • Establish 2 new partnerships with community organizations by December 2026. • Increase youth participation by 5% each calendar year.
Objective 2: Improve the quality and variety of youth service offerings. • Identify gaps in current youth services and develop new programming or activity types. • Provide training for program staff, as well as youth and caregivers, related to positive development and family/youth well-being. • Incorporate youth feedback to shape and improve program design.	• Implement 2 new youth programs or service offerings by December 2028. • Provide targeted training at least annually for program staff beginning 2026. • Conduct annual youth surveys, achieving at least 80% positive feedback and scoring on well-being indicators.
Objective 3: Enhance community support systems that benefit youth development. • Engage families and caregivers through information sessions and family-centered activities. • Collaborate with mental health, education and social service partners to strengthen referral pathways. • Increase awareness of available youth services within the community.	• Offer quarterly family engagement activities starting 2026. • Formalize partnership agreements with 3 supportive services organizations by December 2028. • Increase community referrals to youth programs by at least 5% each year.

#4 Agency Growth

Our agency has a need to obtain additional facilities to house new or expanding programs, increase opportunities for client access, and better serve the needs of our communities.

Goal

To increase facility capacity in order to expand services, house additional programs, and improve accessibility for individuals and families of low-income.

Objective 1

Identify long-term facility needs to support program expansion.

Objective 2

Acquire or renovate facilities to increase program space and service capacity.

Objective 3

Ensure sustainability of new facilities through budget planning and resource development.

Strategies	Measures & Benchmarks
Objective 1: Identify long-term facility needs to support program expansion. • Conduct a comprehensive facility needs assessment across all programs. • Evaluate geographic areas with unmet needs or inadequate space. • Engage staff, leadership and community partners in facility planning discussions.	• Complete facility needs assessment by Quarter 3 annually. • Conduct at least 3 staff and community feedback sessions per year regarding facility needs. • Develop a three-year facility expansion plan to be reviewed annually.
Objective 2: Acquire or renovate facilities to increase program space and service capacity. • Research available buildings, land or leasing opportunities in service areas. • Apply for funding, grants and partnerships to support facility expansion. • Develop phased renovation or build-out plans for newly acquired spaces.	• Identify at least two viable facility options for expansion annually. • Acquire or secure commitments for one new facility or major renovation project by December 2028. • Ensure all newly acquired facilities meet Americans with Disabilities Act requirements and safety standards prior to occupancy.
Objective 3: Ensure sustainability of new facilities through budget planning and resource development. • Develop revenue strategies to support facility operations (grants, fundraising, program income). • Implement facility management procedures, safety plans, and maintenance schedules.	• Ensure support for operations and maintenance of new facilities is included in annual program budgets. • Implement facility maintenance and safety procedures at 100% of locations. • Conduct annual facility inspections and complete corrective actions within 30 days.

PLAN IMPLEMENTATION & ACCOUNTABILITY

LIFT Community Action Agency's 2026-2028 Strategic Plan, approved by the Board of Directors, will be shared with all program staff to ensure a clear understanding of the agency's key goals and objectives. The plan will be accessible on the agency's website and distributed to all staff via email.

Implementation of the Strategic Plan will be led by program staff and leadership under the guidance of LIFT's Board of Directors. Community partners, funders, and other stakeholders will also play a vital role in supporting successful implementation.

Leadership staff, under the direction of the Executive Director, will align program plans and budgets with the Strategic Plan. Each quarter, leadership will dedicate time to review implementation progress and evaluate advancements toward the established goals. These quarterly reviews will provide opportunities to identify and address challenges or barriers, promote accountability, and ensure continued progress toward achieving program objectives.
The Board of Directors will receive formal updates on progress toward achieving the Strategic Plan's objectives at least once per year.

This ongoing process of analysis and evaluation will allow programs to make timely adjustments based on evolving community conditions, ensuring that the plan remains responsive and effective.

CONCLUSIONS

The goals and objectives outlined in LCAA's 2026-2028 Strategic Plan are directly aligned with the priorities identified in the 2025-2027 Community Needs Assessment, which highlighted Housing, Transportation, and Youth Services as key areas of focus.

This Strategic Plan reflects the collective input of a diverse group of stakeholders, including community residents, frontline staff, agency leadership, and key community partners. As a living document, the plan requires an ongoing commitment from all participants to take action on its goals, monitor implementation, and evaluate outcomes to ensure continued effectiveness.

Clear and consistent internal and external communication will be essential to successfully execute the strategies outlined in this plan. Effective implementation will depend on the sustained focus and collaboration of senior leadership and all staff to address identified needs and achieve measurable progress.

REBECCA PORTER
Executive Director
becky.reynolds@liftca.org

MACY SELF
Associate Director
macy.self@liftca.org

LIFT
COMMUNITY ACTION AGENCY, INC.
ADMINISTRATIVE OFFICE

209 NORTH 4TH - HUGO, OK 74743
WWW.LIFTCA.ORG
580-326-3351

SHEREE ENSLEY
Fiscal Officer
sheree.ensley@liftca.org

RHONDA TEAGUE
Planning Director
rhonda.teague@liftca.org

APARTMENTS 580-326-5654
410 N L - Hugo, OK 74743
Margie Owens, Program Director
margie.owens@liftca.org

CACFP 580-326-9332
1005 S 5th - Hugo, OK 74743
Johnna Yow, Program Director
johnna.yow@liftca.org

CASA 580-298-2921
603 SW B Street - Antlers, OK 74523
DeeDee Atwood, Program Director
dianna.atwood@liftca.org

CHOOSING CHILDBIRTH 580-326-3351
209 N 4th St - Hugo, OK 74743
Becky Porter, Executive Director
becky.porter@liftca.org

CORE DAD 580-326-3351
209 N 4th St - Hugo, OK 74743
Beau Johns, Program Director
beau.johns@liftca.org

603 SW B St - Antlers, OK 74523 580-298-2921
David Jobe- Program Director
david.jobe@liftca.org

312 NW Texas- Idabel, OK 74745 580-286-6472
Kurt Reisdorf, Program Director
kurt.reisdorf@liftca.org

EARLY LEARNING CENTERS 580-584-9801
1008 N Park - Broken Bow, OK 74728
Amy Craven, Program Director
amy.craven@liftca.org

Antlers ELC	580-298-6405
Hugo ELC	580-326-9172
Idabel ELC	580-208-2801

HEAD START ADMINISTRATION/CENTERS
1005 S 5th - Hugo, OK 74743 580-326-7581
Darla Galyon, Program Director
darla.galyon@liftca.org

EHS CENTERS

Antlers EHS	580-298-6405
Hugo EHS	580-326-0709
Idabel EHS	580-208-2517

HS CENTERS

Antlers	580-298-3837
Boswell 1	580-566-2729
Boswell 2	580-566-2766
Broken Bow	580-584-6946
Forest Grove 1 & 2	580-208-2228

HEAD START CENTERS CONTINUED..

Ft. Towson	580-873-2259
Horace Mann 1	580-326-2161
Horace Mann 2	580-326-6977
Horace Mann 3	580-326-3131
Hugo 2	580-326-3781
Hugo 4	580-326-7303
Idabel 1	580-286-5609
Idabel 2 & 3	580-286-3709
Rattan	580-587-2592
Soper 1	580-345-2535
Soper 2	580-345-2664

HEALTHY START 580-326-6441
104 N E - Hugo, OK 74743
Macy Self, Associate Director
macy.self@liftca.org

Antlers	580-298-2921
Atoka	580-364-0205
Broken Bow	580-372-3419
Clayton	918-569-7325
Idabel	580-286-9348

HOMEOWNERSHIP CENTER 580-326-5165
500 E Rosewood - Hugo, OK 74743
Brandon McDaniel, Housing Director
brandon.mcdaniel@liftca.org

Antlers	580-298-2921
Idabel	580-286-6472

LENDING SERVICES 580-326-5165
500 E Rosewood - Hugo, OK 74743
Wade Scott, Loan Officer
wade.scott@liftca.org

RSVP 580-298-2921
603 SW B- Antlers, OK 74523
Trula Walker, Program Director
trula.walker@liftca.org

SAFE PLACE HEALING HEARTS/SAFE PLACE HEALING HEARTS TOO 580-298-2921
603 SW B Street - Antlers, OK 74523
DeeDee Atwood, Program Director
dianna.atwood@liftca.org

SECOND CHANCE 580-406-2616
1005 S. 5th St. Bldg #4 - Hugo, OK 74743
Dionne Frankum, Program Director
dionne.frankum@liftca.org

STATE PARK OPERATIONS

Clayton Lake State Park	918-569-7981
Hugo Lake Park	580-326-0303
Raymond Gary State Park	580-873-2307

T&MA 580-326-5165
500 E Rosewood - Hugo, OK 74743
Owyne Gardner, Program Director
owyne.gardner@liftca.org

TRANSIT 580-326-8176
511 W Jackson - Hugo, OK 74743
Jeannie McMillin, Program Director
jeannie.mcmillin@liftca.org

Antlers	580-298-6565
Broken Bow	580-584-6037
Clayton	918-569-7325
Hugo	580-326-3466
Idabel	580-286-5384

TRI-CORP 580-406-2616
1005 S. 5th St. Bldg #4 - Hugo, OK 74743
Dionne Frankum, Program Director
dionne.frankum@liftca.org

VICTIM ADVOCACY SERVICES 580-298-2921
603 SW B Street - Antlers, OK 74523
DeeDee Atwood, Program Director
dianna.atwood@liftca.org

WEATHERIZATION 580-326-5165
500 E Rosewood- Hugo, OK 74743
Terry Wren, Program Director
terry.wren@liftca.org

WORK READY OKLAHOMA-IDABEL 580-407-4WRO
110 SE Washington St- Idabel, OK 74745
Kelly Thomas, Program Director
kelly.thomas@liftca.org

YOUTHBUILD 580-326-9490
2204 E Jackson - Hugo, OK 74743
Jami Meredith, Program Director
jami.meredith@liftca.org

YOUTH MENTORING 580-298-2921
603 SW B Street - Antlers, OK 74523
DeeDee Atwood, Program Director
dianna.atwood@liftca.org

CONTRACT FOR CHILD ABUSE MULTIDISCIPLINARY TEAM ACCOUNT FUNDING
CALENDAR FISCAL YEAR 2026
CHOCTAW COUNTY

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

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

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

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

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

Contract Funding: In accordance with Title 10 O.S. §1-9-102, **OCCY** may disburse the contracted amount at the beginning of the calendar year to the **Contractor** on behalf of the FSMDT upon the FSMDT satisfactorily being recognized by **OCCY** as a functioning FSMDT (see OAC 135:10-25-1 through 10-25-8). The maximum total of this contract is **$34,622.59** for the period of January 1, 2026, through December 31, 2026. This contract shall not take effect and no funds may be disbursed until **OCCY** has in its possession the contract containing original signatures of both parties and a purchase order has been issued by OMES or another approved State agency.

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

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

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

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

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

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

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

GENERAL TERMS AND CONDITIONS

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

APPROVED:	**APPROVED:**
Representing the OCCY as legal signatory	**Representing Contractor as legal signatory**
	RPorter
Brittany Gassner	**Printed Name:** Rebecca Porter
Program Manager, FSMDT Department	**Title:** Executive Director
	11/10/2025
Date	**Date**

CONTRACT FOR CHILD ABUSE MULTIDISCIPLINARY TEAM ACCOUNT FUNDING
CALENDAR FISCAL YEAR 2026
PUSHMATAHA COUNTY

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

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

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

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

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

Contract Funding: In accordance with Title 10 O.S. §1-9-102, **OCCY** may disburse the contracted amount at the beginning of the calendar year to the **Contractor** on behalf of the FSMDT upon the FSMDT satisfactorily being recognized by **OCCY** as a functioning FSMDT (see OAC 135:10-25-1 through 10-25-8). The maximum total of this contract is **$34,622.59** for the period of January 1, 2026, through December 31, 2026. This contract shall not take effect and no funds may be disbursed until **OCCY** has in its possession the contract containing original signatures of both parties and a purchase order has been issued by OMES or another approved State agency.

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

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

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

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

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

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

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

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

GENERAL TERMS AND CONDITIONS

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

APPROVED:

Representing the OCCY as legal signatory

____

Brittany Gassner
Program Manager, FSMDT Department

____

Date

APPROVED:

Representing Contractor as legal signatory

RPorter

Printed Name: Rebecca Porter
Title: Executive Director

11/10/2025
Date

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 women[1] and 37.8% of Oklahoma men[2] 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;

- 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/f/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)

NATIONAL COALITION AGAINST DOMESTIC VIOLENCE

NCADV

DOMESTIC VIOLENCE

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.

Did you know?

- In the United States, more than 10 million adults experience domestic violence annually.[1]
- If each of these adults experienced only once incidence of violence, an adult in the US would experience violence every three seconds. However, because domestic violence is a pattern, many experience repeated acts of abuse annually, so an incident of abuse happens far more frequently than every three seconds.
- 1 in 4 women and 1 in 10 men experience sexual violence, physical violence and/or stalking by an intimate partner during their lifetime with 'IPV-related impact' such as being concerned for their safety, PTSD symptoms, injury, or needing victim services.[2]
    - Approximately 1 in 5 female victims and 1 in 20 male victims need medical care.[3]
    - Female victims sustain injuries 3x more often than male victims.[4]
    - 1 in 5 female victims and 1 in 9 male victims need legal services.[5]
    - 23.2% of women and 13.9% of men have experienced severe physical violence by an intimate partner during their lifetime.[6]
- From 2016 through 2018 the number of intimate partner violence victimizations in the United States increased 42%.[7]
- On a typical day, domestic violence hotlines nationwide receive over 19,000 calls.[8]
- An abuser's access to a firearm increases the risk of intimate partner femicide by 400%.[9]
- In 2018, partner violence accounted for 20% of all violent crime.[10]
- Intimate partner violence is most common against women between the ages of 18-24.[11]
- 19% of intimate partner violence involves a weapon.[12]

Impact

Domestic violence is prevalent in every community, and affects all people regardless of age, socio-economic status, sexual orientation, gender, race, religion, or nationality. Physical violence is often accompanied by emotionally abusive and controlling behavior as part of a much larger, systematic pattern of dominance and control. Domestic violence can result in physical injury, psychological trauma, and even death. The devastating consequences of domestic violence can cross generations and last a lifetime.

Suggested citation: National Coalition Against Domestic Violence (2020). *Domestic violence*. Retrieved from https://assets.speakcdn.com/assets/2497/domestic_violence-2020080709350855.pdf?1596811079991.

NATIONAL COALITION AGAINST DOMESTIC VIOLENCE

NCADV

DOMESTIC VIOLENCE

Sexual assault

- 1 in 5 women and 1 in 40 men in the United States are victims of rape or attempted rape during their lifetime.[13]
- Nearly 1 in 5 women and 1 in 12 men have experienced contact sexual violence by an intimate partner in their lifetime.[14]
- From 2016 through 2018 the number of rape/sexual assault victimizations in the United States increased 146%.[15]

Stalking

- Stalking victimization involves a pattern of harassing or threatening tactics used by a perpetrator that causes the victim to fear for their safety or the safety of others.
- 19.1 million women and 6.4 million men in the United States have been stalked.[16]
- 66.2% of female stalking victims reported stalking by a current or former intimate partner.[17]
- 1 in 10 women and 1 in 50 men have experienced stalking by an intimate partner during their lifetime.[18]

Homicide

- 1 in 2 female murder victims and 1 in 13 male murder victims are killed by intimate partners.[19]
- A study of intimate partner homicides found 20% of victims were family members or friends of the abused partner, neighbors, persons who intervened, law enforcement responders, or bystanders.[20]
- 65% of all murder-suicides are perpetrated by intimate partners.[21]
- 96% of murder-suicide victims are female.[22]
- Most intimate partner homicides are committed with firearms.[23]
- Abusers' access to firearms increases the risk of intimate partner femicide at least five-fold. When firearms have been used in the most severe abuse incident, the risk increases 41-fold.[24]
- While the overall rate of intimate partner has decreased, intimate partner femicide has increased in recent years, driven by an increase in intimate partner femicide committed with a firearm.[25]

Physical & mental effects

- Victims of intimate partner violence are at increased risk of contracting HIV or other STI's due to forced intercourse and/or prolonged exposure to stress. [26]
- Intimate partner victimization is correlated with a higher rate of depression and suicidal behavior.[27]
- Only 34% of people who are injured by intimate partners receive medical care for their injuries.[28]

Economic effects

NATIONAL COALITION AGAINST DOMESTIC VIOLENCE

NCADV

DOMESTIC VIOLENCE

- Victims of intimate partner violence lose a total of 8,000,000 days of paid work each year, the equivalent of 32,000 full-time jobs.[29]
- Intimate partner violence is estimated to cost the US economy between $5.8 billion and $12.6 billion annually, up to 0.125% of the national gross domestic product.[30]
- Between 21-60% of victims of intimate partner violence lose their jobs due to reasons stemming from the abuse.[31]
- Between 2003 and 2008, 142 women were murdered in their workplace by former or current intimate partners. This amounts to 22% of workplace homicides among women.[32]

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[1] 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*. Retrieved from http://www.cdc.gov/violenceprevention/pdf/nisvs_report2010-a.pdf.
[2] Smith, S.G., Zhang, X., Basile, K.C., Merrick, M.T., Wang, J., Kresnow, M. & Chen, J. (2018). *The national intimate partner and sexual violence survey: 2015 data brief - updated release.* Atlanta: National Center for Injury Prevention and Control, Centers for Disease Control and Prevention. Retrieved from https://www.cdc.gov/violenceprevention/pdf/2015data-brief508.pdf.
[3] 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.* Atlanta: National Center for Injury Prevention and Control, Centers for Disease Control and Prevention. Retrieved from https://www.cdc.gov/violenceprevention/pdf/NISVS-StateReportBook.pdf.
[4] Ibid.
[5] Ibid.
[6] Ibid.
[7] Morgan, R.E., & Oudekerk, B.A. (2019). *Criminal victimization, 2018.* Bureau of Justice Statistics. Retrieved from https://www.bjs.gov/content/pub/pdf/cv18.pdf.
[8] National Network to End Domestic Violence (2020). *14th annual domestic violence counts report.* Retrieved from NNEDV.org/DVCounts.
[9] 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.
[10] Morgan, R.E., & Oudekerk, B.A. (2019). *Criminal victimization, 2018.* Bureau of Justice Statistics. Retrieved from https://www.bjs.gov/content/pub/pdf/cv18.pdf.
[11] Ibid.
[12] Ibid.
[13] Smith, S.G., Zhang, X., Basile, K.C., Merrick, M.T., Wang, J., Kresnow, M. & Chen, J. (2018). *The national intimate partner and sexual violence survey: 2015 data brief - updated release.* Atlanta: National Center for Injury Prevention and Control, Centers for Disease Control and Prevention. Retrieved from https://www.cdc.gov/violenceprevention/pdf/2015data-brief508.pdf.
[14] Ibid.
[15] Morgan, R.E., & Oudekerk, B.A. (2019). *Criminal victimization, 2018.* Bureau of Justice Statistics. Retrieved from https://www.bjs.gov/content/pub/pdf/cv18.pdf.
[16] Smith, S.G., Zhang, X., Basile, K.C., Merrick, M.T., Wang, J., Kresnow, M. & Chen, J. (2018). *The national intimate partner and sexual violence survey: 2015 data brief - updated release.* Atlanta: National Center for Injury Prevention and Control, Centers for Disease Control and Prevention. Retrieved from https://www.cdc.gov/violenceprevention/pdf/2015data-brief508.pdf.
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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.

Suggested citation: National Coalition Against Domestic Violence (2020). *Domestic violence*. Retrieved from https://assets.speakcdn.com/assets/2497/domestic_violence-2020080709350855.pdf?1596811079991.

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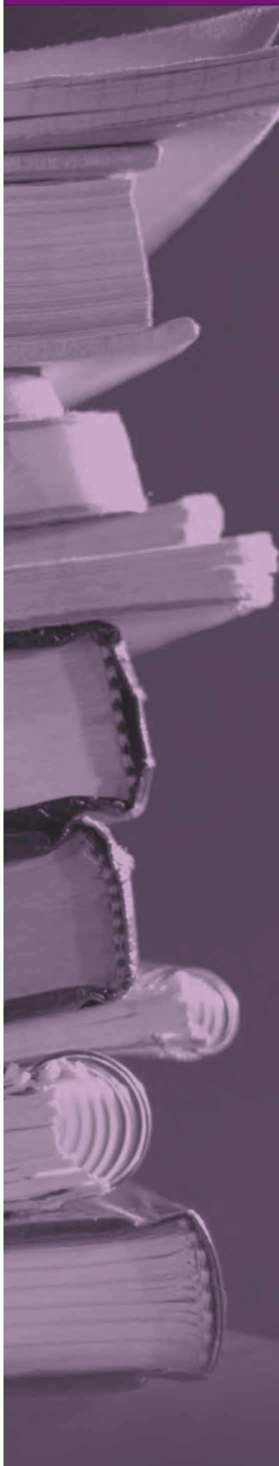
What is Sexual Violence?



Fact Sheet

Sexual violence affects women, men and children throughout their lives and can be devastating for individuals, families, and communities. However, help is available. Together, we can change the conditions that contribute to sexual violence.

What is sexual violence?

Sexual violence means that someone forces or manipulates someone else into unwanted sexual activity without their consent. Reasons someone might not consent include fear, age, illness, disability, and/or influence of alcohol or other drugs. Anyone can experience sexual violence including: children, teens, adults, and elders. Those who sexually abuse can be acquaintances, family members, trusted individuals or strangers.

Forms of sexual violence

- Rape or sexual assault
- Child sexual assault and incest
- Intimate partner sexual assault
- Unwanted sexual contact/touching
- Sexual harassment
- Sexual exploitation
- Showing one's genitals or naked body to other(s) without consent
- Masturbating in public
- Watching someone in a private act without their knowledge or permission

Facts about sexual violence

FACT: Chances are you know someone who has been sexually assaulted.

- Sexual violence affects people of all genders, ages, races, religions, incomes, abilities, professions, ethnicities, and sexual orientations. However, social inequalities can heighten the risk.
- By age 18, 1 in 4 girls will be sexually assaulted; by age 18, 1 in 6 boys will be assaulted (Finkelhor, Hotaling, Lewis & Smith, 1990).
- At some time in their lives, 1 in 6 women have experienced an attempted or completed rape; more than half occurred before the woman was 18, and 22% before age 12 (Tjaden & Thoennes, 2000).
- During their lives, 1 in 33 men have experienced an attempted or completed rape; 75% occurred before the men were 18, and 48% before age 12 (Tjaden & Thoennes, 2000).

FACT: Victims usually know their assaulter.

- People who sexually assault usually attack someone they know — a friend, classmate, neighbor, coworker, or relative.
- Of adults, 73% knew the attacker, 38% were friends of the attacker, 28% were an intimate partner of the attacker, and 7% were a relative of the attacker (Maston & Klaus, 2005).
- Child victims knew the offender before the attack 90% of the time (Greenfeld, 1996).
- About 40% of sexual assaults take place in the victim's own home. Another 20% occur in the home of a

friend, neighbor, or relative (Greenfeld, 1997).

FACT: Victims are never at fault for a sexual assault.

- It doesn't matter what someone is wearing or how they are acting, no one asks to be raped.
- People who sexually assault often use force, threat, or injury.
- An absence of injuries to the victim does not indicate the victim consented.

FACT: Rape is the least reported and convicted violent crime in the U.S.

There are many reasons why victims may choose not to report to law enforcement or tell anyone about what happened to him/her. Some include:

- Concern for not being believed
- Fear of the attackers getting back at him/her
- Embarrassment or shame
- Fear of being blamed
- Pressure from others not to tell
- Distrust of law enforcement
- Belief that there is not enough evidence
- Desire to protect the attacker

Many victims who do report a rape or sexual assault find that there is no arrest or conviction.

- Probability of arrest after a report is 50.8% (Reynolds, 1999) and the probability of a rapist being sent to prison is 16.3% (Reynolds, 1999).

FACT: Sexual violence is preventable.

By working with your community's sexual assault center, you can:

- Model supportive relationships and behaviors with your friends and families
- Stand up for victims and believe them
- Speak up when you hear harmful comments or witness violent acts
- Create policies at your workplace or school system to stop sexual violence and help victims
- Coordinate a community event to raise awareness about sexual violence or talk with community members about ways they can get involved
- Talk with your legislators and ask them to support prevention and victim services

FACT: Help is available

- Local sexual assault centers can provide help. In crisis situations, contact RAINN at 1-800-656-4673. For more information, visit http://www.nsvrc.org.

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What is Teen Dating Violence?

A pattern or series of abusive behaviors over a course of time that reflects the perpetrator's desire to control, dominate, and exert power over a dating partner.

Physical

- Hitting, slapping, punching, kicking, shoving
- Scratching, pinching, biting, choking, hair pulling
- Grabbing a dating partner's body parts or clothing to prevent partner from leaving or forcing him/her to go somewhere
- Grabbing a partner's face to make him/her look at them
- Throwing a foreign object at a dating partner
- Using a gun, knife, bat, mace, or other weapon

Sexual

- Unwanted kissing, touching, and sexual activity gained through force, pressure, threats, manipulation and/or intimidation
- Sexual assault or attempted sexual assault
- Getting a dating partner drunk/drugged for sex
- Sexual contact with a dating partner who is drunk, drugged, unconscious, or otherwise unable to give a clear and informed "yes" or "no"
- Keeping a dating partner from protecting him/herself from STIs or getting pregnant
- Sexual slurs or attacks on a dating partner's gender or sexual orientation
- Sending unwanted, explicit pictures/videos and/or demanding them in return

Psychological

Verbal and Emotional

- Yelling and screaming
- Name-calling, ridiculing, criticizing, humiliating
- Starting rumors about a dating partner
- Making a dating partner feel guilty or insecure
- Making a dating partner think s/he is irrational
- Emotional blackmailing
- Playing mind games

Threatening to…

- Harm a dating partner or his/her pet or loved ones
- Report a dating partner to police
- Have children taken away
- Expose a dating partner's secrets such as sexual orientation or immigration status
- Leave the dating partner
- Commit suicide

Controlling Behaviors

- Isolation
- Preventing a dating partner from interacting with friends/family
- Controlling what a dating partner does and who s/he sees and talks to

Includes telling the dating partner who he/she can and can't be friends with on social media and constantly checking and sending texts, emails, etc.

Intimidation

- Stalking
- Using looks, actions, gestures to scare a dating partner
- Smashing things/destroying personal property
- Displaying weapons

Manipulation

- Blaming dating partner's actions for perpetrator's abusive or unhealthy behavior
- Forcing a partner to drop charges/do illegal activities
- Using jealousy to justify actions
- Minimizing – making light of the abuse and not taking concerns about it seriously
- Denying the abuse happened
- Shifting responsibility for abusive behavior

Any of these behaviors can be perpetuated via electronic methods (i.e. phone calls, texts, emails, social media, etc.)

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NJCEDV New Jersey Coalition to End Domestic Violence

Compiled by the Center on Violence Against Women and Children, School of Social Work, Rutgers University, vawc.rutgers.edu in collaboration with the NJ Domestic Violence Fatality and Near Fatality Review Board, www.nj.gov/dcf/providers/boards/dvfnfrb/

Teen Dating Violence Statistics

*Nearly **1.5 million high school students** nationwide experience physical abuse from a dating partner in a single year.*[1]

The Victims/Survivors*

- **One in three adolescents** in the U.S. is a survivor of physical, sexual, emotional, or verbal abuse from a dating partner, a figure that far exceeds rates of other types of youth violence.[1,2]
- **Girls and young women between the ages of 16 and 24** experience the highest rate of intimate partner violence – almost triple the national average.[1,3]
- **Nearly one in four girls (23%) who have been in a relationship** reported going further sexually than they wanted as a result of pressure.[2]
- Only **33% of teens** who were in a violent relationship ever told anyone about the abuse, and **86%** said they would confide in a friend rather than a caring adult.[1,4]
- **Hispanic immigrant girls have less than half** the risk of TDV as their non-immigrant Hispanic peers.[6]
- TDV is extremely common in LGBTQ relationships – **up to 50% of LGBTQ individuals** will be abused by a dating partner.[7]

**The terms victims and survivors are both used because sometimes individuals identify as one or the other.*

***1 in 5 high school female students** are physically and/or sexually abused by their dating partner.*[4]

The Perpetrators

- Violent behavior typically begins **between the ages of 12 and 18.**[1] **More than 50% of sexual assaults** are committed by a woman's romantic partner.[9]
- **Individuals with a history of physical violence against their partners are 13 times more likely** to commit future acts of physical aggression compared to persons who have never committed this form of physical abuse.[9]
- Youth who engaged in high rates of self-reported **bully perpetration during middle school were almost 7 times more likely** to engage in physical TDV perpetration four years later in high school.[10]

The Bystanders

- **81% of parents** believe TDV is not an issue or admit they don't know if it's an issue for teens.[1,4]
- **Over 80% of high school counselors** report feeling unprepared to address incidents of abuse on their school campus.[2]
- **50-80% of teens** have reported knowing others who were involved in violent relationships.[3]
- **57% of teens** say they know of a peer who has been physically, sexually, or verbally abusive to their dating partner. **33% of teens** have actually seen the abuse or violence themselves.[4]

Risks of Teen Dating Violence

- **Half of youth survivors** of both TDV and sexual assault attempt suicide, compared to **12.5% of non-abused girls** and **5.4% of non-abused boys.**[1]
- Physical or sexual abuse makes **teen girls 6 times more likely** to become pregnant and **twice as likely** to get an STI.[1]
- Survivors of TDV are significantly more likely to use drugs, smoke, or drink alcohol than those who did not experience abuse.[5]

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NJCEDV New Jersey Coalition to End Domestic Violence

There is a real and frighteningly significant connection between stalking and intimate partner violence. Stalking often co-occurs with intimate partner violence and can be an indicator of other forms of violence. Stalking can be a way to exert power and control during and/or after an abusive relationship.

DID YOU KNOW?

- 40% of stalking victims are stalked by current or former intimate partners.[A]
- 57% of intimate partner stalking victims are stalked during the relationship.[B]
- 74% of those stalked by a former intimate partner report violence and/or coercive control during the relationship.[C]
- 81% of women stalked by a current or former husband or cohabitating partner were also physically assaulted by that partner.[D]
- 31% of women stalked by an intimate partner were also sexually assaulted.[E]
- 41% of victims stalked by a current intimate partner and 35% stalked by a former intimate partner experience threats of harm, compared to 24% stalked by a non-intimate partner.[F]
- The average length of partner stalking is 2.2 years (longer than the average of just over 1 year for non-intimate partner cases).[G]

STALKING & PARTNER HOMICIDE

- Stalking increases the risk of intimate partner homicide by three times.[H]
- The most common use of the criminal justice system prior to attempted or completed intimate partner homicide was reporting intimate partner stalking.[I]
- Among female victims of attempted and completed intimate partner homicide by male partners, in the 12 months prior to the attack:[J]
  - 85% of attempted and 76% of completed homicide victims were stalked.
  - 91% of attempted and 89% of completed homicide victims who had been physically abused during the relationship had also been stalked.
  - 46% of attempted and 54% of completed homicide victims reported stalking before the attack, most commonly to police.

INTIMATE PARTNER STALKING OFFENDERS

- Abusive partners who stalk are more likely (than abusive partners who do not stalk) to verbally degrade, threaten, use a weapon to attack, sexually assault, and/or physically injure their victims.[K]
- Intimate partner stalkers are more likely (than stalkers who are not intimate partners) to:
  - Use the widest range of stalking tactics.[L]
  - Contact and approach victims more frequently.[M]
  - Assault their victims.[N]
  - Be insulting and interfere in the victim's life.[O]
  - Escalate the frequency and intensity of pursuit more often.[P]
  - Threaten victims with weapons or actually use weapons on their victims.[Q]
  - Be threatening to their victims and reoffend.[R]
  - Follow through on threats of violence.[S] One study found that among stalking victims threatened, 71% of intimate partner victims were actually assaulted compared to 33% of non-intimate partner victims.[T]
  - Assault third parties.[U]
  - Reoffend after a court intervention and reoffend more quickly.[V]
- The risk of physical violence is heightened when the intimate partner stalker:[W]
  - Issues direct threats of violence;
  - Expresses jealousy of the victim's relationships with others during the relationship; and
  - Uses illegal drugs.

STALKING & SEPARATION

- Victims stalked by violent partners report more separation attempts than partner violence victims who were not stalked.[X]
- Intimate partner stalking made victims more likely to want to leave the relationship than other factors, including psychological aggression and injury.[Y]
- Stalking after a separation may increase the risk of violence.[ZAABB]

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Children's Exposure to Domestic Violence Fact Sheet

Overview

The traumatic effects of domestic violence can impact more than just adult survivors. Children who are exposed to the abuse of a parent or guardian can face increased health risks, higher likelihood of engaging in or experiencing violence, difficulties in school, and psychological or developmental impairments. However, there are numerous protective factors that can promote resilience in children and youth, and can support their ability to heal and find wellness. By being aware of the impact of domestic violence on children, service providers and professionals who work with youth can be more trauma-informed and child-centered in their approach.

- **Domestic violence:** refers to a pattern of behavior that one partner uses to control the other and includes physical, emotional, psychological, sexual, or financial abuse.
- **Children's exposure to domestic violence:** refers to when a child directly witnesses the abuse of a parent or guardian, notices the aftermath, or generally experiences the dynamic of abuse in the home.

Prevalence

The research and data available about children's exposure or experience of domestic violence demonstrates the need for screening and support to child victims and non-abusing caregivers. Child advocates note that this data may suffer from underreporting, given children's dependence on adults and the stigma of domestic violence.

- According to the 2008 National Survey on Children's Exposure to Violence, 1 in 4 children (26%) had been exposed to family violence in their lifetime. 1 in 15 (6.6%) had been exposed to intimate partner violence involving a parent in the last year.
- A 2003 study published by the Journal of Interpersonal Violence indicated that 15.5 million children in the United States lived in families where partner violence took place in the past year, and seven million children lived in families where severe partner violence took place.

Impact

The effects of witnessing and experiencing domestic violence can have damaging short- and long-term effects on children's emotional, psychological and physical wellness. This points to the need for professionals who work with youth to be trauma-informed in their practice, and to understand the impact that adverse childhood experiences (ACES) can have on their developmental growth and behavior.

- A 1997 study conducted by the Centers for Disease Control (CDC) and Kaiser Permanente found that children who experience childhood trauma (including witnessing domestic violence) were more likely to have serious adult health problems such as depression, heart disease, substance abuse, tobacco use, and a higher risk of unintended pregnancy. They were also more likely to experience symptoms of anxiety, suicidal thoughts, and post-traumatic stress disorder (PTSD).
- Futures Without Violence notes that children who witness domestic violence can experience changes in emotions (such as mood swings, fearfulness, and aggression) and behavior (such as sleep troubles, temper tantrums, and separation anxiety).

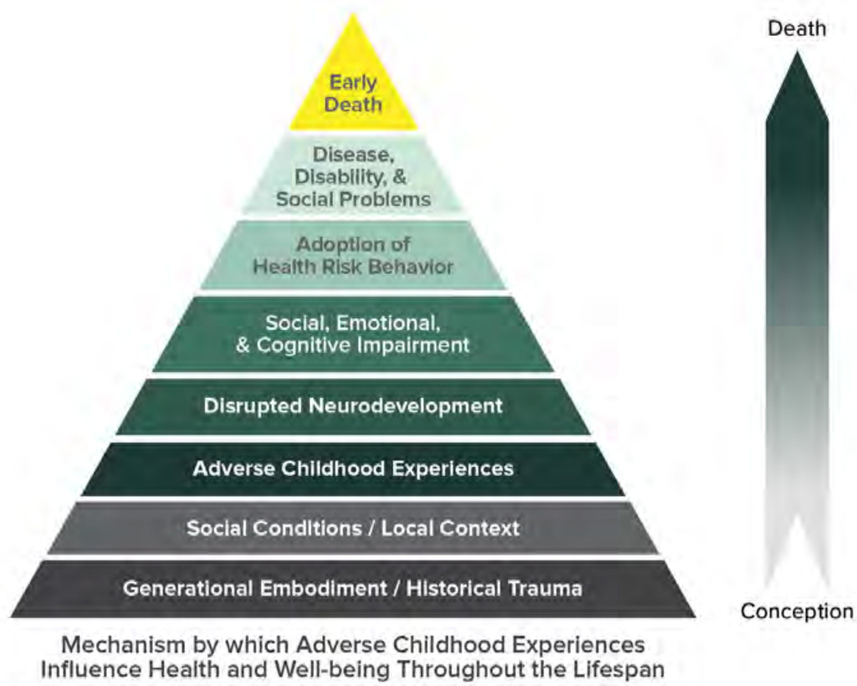

Image Credit: ACE Pyramid, CDC

Protective Factors

Resilience is the ability for an individual to be well despite hardship or trauma. Many protective factors at the individual, family, community, and societal level can promote resilience in children who have witnessed domestic violence. Most significantly, a positive relationship with non-abusing caregivers can provide much needed love, support, and safety to children. Service providers can promote this protective factor by engaging non-abusing caregivers in programming and services, such as offering counseling to both the adult and child at the same time. Other protective factors include feelings of connection to community and culture, healthy relationships with other adults and peers, consistent attendance at school, and strengthened emotional literacy and self-calming techniques. For further learning, read "Protective Factors for Survivors of Domestic Violence" from the Quality Improvement Center on Domestic Violence in Child Welfare

Promising Interventions

There are many promising trauma-informed therapeutic interventions for children and youth exposed to domestic violence. There is no single "one size fits all" approach, so it is important for advocates, youth serving organizations, schools, and protective parents to be informed about the variety of practices available, as well as the credentials and training of the individual providing the therapeutic intervention. The National Child Traumatic Stress Network has developed fact sheets and assessment tools to help with the process. Additionally, Futures Without Violence has compiled a list of evidence-based practices for prevention, intervention/treatment, and systems response programs for children exposed to violence. All interventions should be trauma-informed, culturally responsive and centered on fostering resilience, healing and hope for children exposed to violence and harm.

Getting Support

In addition to on-the-ground support from the OVW Children & Youth and Engaging Men grantee programs across the country, much work is being done to understand how to support children who have witnessed or experienced domestic violence.

- ACEs Aware offers resources for clinicians on screening and responding to Adverse Childhood Experiences
- The National Child Traumatic Stress Network maintains a resource library of fact sheets (in English and Spanish) for parents and service providers about intimate partner violence and children
- Promising Futures is a useful resource for helping programs transform or enhance their ability to effectively meet the needs of women, children and youth experiencing domestic violence. The site includes fact sheets, program readiness assessments, intervention models, and more.
- Read Futures Without Violence's publication entitled "Everyday Magic: 16 Ways Adults Can Support Children Exposed to Violence and Trauma"

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SERVING OUR YOUTH

Children's Exposure to Domestic Violence Action Sheet

To commemorate October as Domestic Violence Awareness Month, the Serving Our Youth team has compiled a list of tangible ways grantees and their communities can take action to support children who are exposed to domestic violence.

Community Based Programs Who Work with Youth

Build trusting, supportive, and dependable relationships with the youth you work with.

Having positive adults in their lives who consistently make time to check in and offer support can be a major protective factor for youth who have witnessed domestic violence.

Disrupt hurtful or oppressive language and behavior when you see it. Co-create community agreements to set expectations in your space.

Whether it comes from youth or adults, be clear that controlling behavior, put-downs, and violence are not tolerated in your space. Letting this language or behavior go unaddressed can make students feel like your space is not safe for them, and can further trigger or traumatize them.

Audit your agency's youth-facing programs for safety and climate.

Doing an organization-wide audit can help you understand what gaps in your services there are, and where safety for youth can be increased to avoid re-traumatization. The BE SAFE Project has developed an evaluation form that can help with assessments.

Understand what evidence-based practices support children exposed to violence.

The U.S. Department of Justice and U.S. Department of Health and Human Services has compiled a list of evidence-based practices for prevention, intervention/ treatment, and systems response programs for children exposed to violence.

Understand and communicate your mandated reporter status.

Make sure that the youth you work with understand what your mandated reporter status means for them, so they don't feel betrayed if you have to call child protective services. If you have to call, notify a non-abusing caregiver and evaluate the immediate safety needs of the child.

Creating Safe & Supportive Schools

Be prepared to support safety planning at school with trauma-informed policy that all school staff are trained on and understand how to implement.

Students who have been exposed to domestic violence may have additional safety needs at school (e.g. enforcing orders of protection or making sure only a non-abusing caregiver picks them up from school).

Communicate to families and youth what resources and services are available through your school and in the community.

Building partnerships with domestic & sexual violence resource organizations can help streamline the referral process to get children and/or non-abusing caregivers counseling, court advocacy, and safety plannng.

Embrace trauma-informed practices school-wide.

Experiencing trauma can impact students' mental health, behavior, academic performance, and feelings of safety. Trauma-informed practices understand the role of trauma in context and promote students' resilience. To learn more about trauma-informed schools, visit the National Education Association's Trauma-Informed Schools page, or TraumaAwareSchools.org.

Promote healthy relationships messaging and programming school-wide and for all grade levels.

Violence prevention programming can help assert healthy/unhealthy relationship behaviors and de-normalize violence. If possible, have a youth advocate or counselor in the room who can respond to potential disclosures from students.

Engaging Men and Boys

Be a loving and consistent presence.

We know that mentoring boys and young men requires nurturing and structure as key ingredients to healthy development--whether you're a relative, teacher, coach, or a youth-serving professional. These two elements are the main philosophy of guiding boys and young men, especially those exposed to violence.

Lead with empathy.

As Dr. Brené Brown points out, empathy is something you do—it's an action that doesn't seek to fix things, but instead seeks to create a healthy, supportive connection. If someone discloses to you, remember to begin by listening and offering an empathetic response, before moving into how you can help.

It's okay to wait on the tough issues.

Domestic violence can bring complicated feelings that are difficult to name or talk about, especially given stigmas unique to boys and men. Give yourself time to build relationships to create a solid foundation for the hard discussions later.

Define your own manhood, and share with other boys and men.

Consider how common messages like "don't let a woman push you around" play a role in creating unhealthy versions of manhood and unsafe relationships for women and children. Men can decide to define themselves through healthy actions and language, and the boys and young men you work with can learn from you.

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LIFT Community Action Agency, Inc.

209 N 4th Hugo, OK 74743 | 580-326-3351 | www.liftca.org

Victim Services Programs

Policies and Procedures Manual

APPROVED BY THE BOARD OF DIRECTORS
October 14, 2025

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William Smith, Board Chairman

THIS INSTITUTION IS AN EQUAL OPPORTUNITY PROVIDER AND EMPLOYER.

The purpose of this Policies and Procedures Manual is to establish operating procedures that are standard throughout LIFT Community Action Agency's Victim Services Programs (hereafter referred to as LIFT CAA), to protect the employees and to preserve the integrity of the programs. This manual shall serve as one document to be used by all persons. As the agency grows, it may become necessary to amend the plan. When this occurs, staff members will be informed of the amendments. It is the responsibility of each Victim Services Program employee, volunteer, and LIFT CAA Board Member to read this manual and to become familiar with the provisions.

MISSION

The mission of LIFT CAA's Victim Services Programs is to provide relief and support for persons who have suffered physical or emotional abuse as a result of domestic violence, sexual assault, and stalking; to empower those who have lived in violent relationships and those who are survivors of sexual assault and stalking by utilizing the concepts of individual worth, choice, self-determination and independence; to assist those persons to utilize community resources for the establishment of healthy familial relationships and self-growth; to eradicate the myths and ignorance by enlightening and educating the communities served; and to advocate unceasingly for a non-violent society. In accordance with this mission, LIFT CAA serves and is served by persons of all age, economic, ethnic, lifestyle, racial, religious and social groups. The mission of the LIFT CAA's Court Appointed Special Advocates (CASA) Program is to provide a volunteer to serve as advocate for every abused or deprived child who comes before our District Court. A further mission of the CASA program is to raise community awareness of the needs of abused children, and to develop ways the community can participate in meeting those needs.

PHILOSOPHY

The philosophy for service provision for victims of domestic violence, sexual assault is that: All persons have the right to live without fear, abuse, coercion, oppression, violence, and child abuse. There should be equality in relationships and survivors of domestic violence, sexual assault and stalking should be helped to assume power over their own lives. No one deserves to be victimized by assaultive, coercive, or abusive behavior, and survivors should be treated with dignity and respect; all people involved in violent crimes are affected – victims, children, families, partners, friends, the community, and perpetrators. Offending is a choice, and perpetrators of domestic violence, sexual assault and stalking are solely responsible for their behavior, and they should be held accountable for their behavior. A coordinated community response is the best approach to eliminating domestic violence, sexual assault, sex trafficking, and stalking in Oklahoma, with safety for victims/survivors and their dependents the primary focus; intervention and services shall be based upon the safety and well-being of individuals and communities. Services shall be provided in a non-judgmental, voluntary, non-coercive manner and take place in a safe, trauma-informed environment. Services should encourage self-determination (based on needs, preferences and values), autonomy, physical and emotional safety, and provide information that will enable independence. Services shall respect the spectrum of differences that exists among groups of people with definable and unique cultural backgrounds. Services shall be delivered from an approach that recognizes the impact of trauma and acknowledges the role of trauma in the lives of victims/survivors and their dependents.

DEFINITIONS

LIFT CAA adheres to the definitions, terminology, and interpretive guidance contained within the current version of the *Oklahoma Administrative Code - Title 75, Chapter 15. Standards and Criteria for Domestic Violence and Sexual Assault Programs*, as promulgated by the Oklahoma Office of the Attorney General and the Victim Advocacy and Services Unit. In the event of updates or amendments to these definitions, LIFT CAA will automatically adopt the most recent and applicable definitions to ensure consistency and compliance with state certification requirements.

LIFT CAA VICTIM SERVICES PROGRAMS

I. CORE SERVICES

a. It is the policy of LIFT CAA's Victim Services Programs to serve residential and non-residential victims of domestic violence, sexual assault, and stalking, and their dependents or family members. The Court Appointed Special Advocates (CASA) Program utilizes trained volunteers to be the voice of children (from birth to age 18) who have been victims of abuse and/or neglect. The Safe Place Healing Hearts Programs directly serves and works to enhance the safety of rural victims (child and adult) of sexual assault, domestic violence, dating violence, and stalking. The Victim Advocacy Services Program provides direct, supportive services to all types of victims, including domestic violence and/or sexual assault. All aspects of the service components within these programs are completed through the work of agency staff and volunteers, as detailed in this Manual.
b. LIFT CAA shall provide safe, accessible, and trauma-informed services for victims of domestic violence, sexual assault, and stalking, and their dependents or family members.
c. LIFT CAA shall have a philosophy of service provision based upon voluntary services and individual self-determination. The written statement of the philosophy of services shall be approved by the governing Board of Directors and made available to the community, staff, volunteers and clients.
d. LIFT CAA shall have policies and procedures to maintain facilities, staffing, and operational methods, including a policy for recruitment of board members, staff and volunteers who are representative of diversity in the local community and of clients served.
e. LIFT CAA shall provide sexual assault services.
f. LIFT CAA shall offer crisis intervention services (see Section II).
g. LIFT CAA shall offer danger assessment, safety planning, counseling or support, support groups, and advocacy in a trauma-informed environment.
h. LIFT CAA shall maintain an atmosphere of and offer services that are free from all forms of unlawful discrimination based on race, sex, color, age, national origin, genetic information, religion, and/or disability (i.e., physical, mental illness, and substance abuse). Services will not be denied or diminished on the basis of immigration status.
i. LIFT CAA shall provide public education to increase the community's awareness and understanding of domestic violence, sexual assault and stalking, available and needed resources,

and to identify the role community can play in eliminating domestic violence, sexual assault, and stalking.

j. The programs, in compliance with 75:15-9-2 Program Management, shall maintain written policies procedures which describe each program service component, the rules clients are expected to follow for each component, and staff or volunteer duties. Policies shall include but not be limited to: physical punishment of children shall not be allowed; length of stay limitations (if any); and participation in housekeeping, food preparation or other activities (if applicable). Rules shall be visibly posted in client areas. Clients shall be given a copy of program rules and the provision of such shall be documented in the client record. The programs shall have a written policy of the intent to comply with the Americans with Disabilities Act of 1990.

II. CRISIS INTERVENTION SERVICES

LIFT CAA shall offer trauma-informed crisis intervention services, to include the following:

a. Crisis telephone services staffed twenty-four (24) hours per day by trained staff or volunteers, and 24-hour immediate, direct access to crisis advocates. Pagers, answering machines or answering services shall not be used.
b. Emergency housing such as hotel or motel available for victims and their dependent(s).
c. Arrangement for safe shelter, food, clothing, and incidentals as needed by victims and dependents.
d. Twenty-four (24) hour emergency transportation or access to transportation for necessary and emergency services (i.e. shelter, to and from SANE exams, other emergency services, etc.). Transportation shall be offered for other services necessary for victim safety. This provision shall not require service providers to be placed in a situation that could result in injury.
e. Cooperation with law enforcement to offer assistance to the victim and accompanying dependent(s). LIFT CAA will ensure victims are educated about participating in the legal prosecution of their offender and that an appropriate release or waiver may be necessary.
f. Provision of advocacy and referral to assist victims in obtaining needed services or resources.
g. Language interpretation.
h. Follow-up services to all victims, if victim safety is not compromised. Clients who give permission for follow-up services will be contacted within two (2) weeks of initial contact.
i. Group and/or individual counseling or support services, made available before or after normal business hours (8 am to 5 pm), if needed by clients. These services shall minimally offer the following:
    1) A facility with offices, and individual and group counseling space to offer services.
    2) Advocacy services, both in person and by telephone, either in the locations of other community services and systems, or in the program's offices. Other locations include, but are not limited to, those necessary to provide court advocacy services to clients.
    3) Service approaches shall focus on the empowerment of victims to access needed resources and to make healthy and safe decisions for themselves and dependents.
j. LIFT CAA shall maintain at a minimum the following client resources:

1) Service agreements with community service providers for client services, which shall be renewed every three (3) years; if unable to establish a service agreement, attempts shall be documented;
2) A resource document of local, area, or state resources to facilitate referrals for clients;
3) An updated list of identified behavioral health professionals in the community who treat clients with related trauma and need mental health or substance abuse services, since LIFT CAA does not have a behavioral health professional on staff.

III. SEXUAL ASSAULT SERVICES

a. LIFT CAA is and shall continue to serve as an active member of the Sexual Assault Response Team/Coordinated Community Response Team in each county of its service area (Choctaw, McCurtain, and Pushmataha Counties). In addition, LIFT CAA collaborates with other certified DVSA providers in the service area. At a minimum, LIFT CAA shall offer the following services:
    1) Counseling or advocacy and support services offered at any safe and appropriate site (LIFT CAA offices, law enforcement, legal, medical or social service setting), as needed by the client.
    2) A twenty-four (24) hour crisis line, crisis intervention, in-person advocacy, active listening, and support by trained staff or volunteers with a knowledge of the issues and processes of sexual assault, rape trauma recovery, assessment, referral when indicated, and family involvement when chosen by the victim.
    3) Clothing, if needed, for the sexual assault victims.
    4) Follow-up contact that does not compromise privacy and safety needs of the victim shall be offered to all sexual assault clients seen in the medical setting.
b. If written permission is granted by the client for follow-up contact, it shall be done no later than fourteen (14) business days after face-to-face crisis intervention. Follow-up will offer agency services or other available resources needed by the client.
c. When appropriate staff or volunteers are available, LIFT CAA shall assist the Council on Law Enforcement Education and Training (CLEET) by providing appropriate staff or volunteers to assist in sexual assault and sexual violence training to law enforcement.
d. Since LIFT CAA does not have a behavioral health professional on staff, the agency shall maintain an updated list of identified behavioral health professionals within the service area who treat clients with sexual assault-related trauma.

IV. CHILDREN'S SERVICES

LIFT CAA client records for children shall contain, at a minimum, the following information:

a. Intake and screening information
    1) Client's name
    2) Date of initial contact/intake
    3) Age
    4) Pertinent medical information

5) Mother's name
6) Father's name
7) Name of adult client's abuser

b. Custody
1) Has a court entered a custody order? If yes, what does the order provide?
2) With whom does the child physically reside?
3) Does the child have contact with the adult client's abuser?
4) Is visitation court ordered with the abuser?

c. Safety (including but not limited to)
1) History of child abuse or neglect
2) Exposure or witnessing violence
3) Child's response to witnessing violence
4) History of involvement in the child welfare system, including the presence of current child welfare involvement

d. Service notes, which shall minimally include:
1) Date
2) Location
3) Start time
4) Duration
5) Description of services provided delineated by time spent and service code, if applicable, or documentation of referral to other services or case management.

e. Within five (5) business days of entry into residential services (excluding advocacy, children's activities or crisis intervention), LIFT CAA shall offer to assess the risk and needs of the children accompanying primary victims as well as offer children's services to address the impact of violence and trauma in their lives and to facilitate healing. A risk and needs screening and assessment on each child, when accepted, shall minimally include:
1) Brief trauma screening to assess the impact of trauma;
2) Developmental history to include speech and language, hearing and visual;
3) Medical or physical health history;
4) Social history to include interactions with peers;
5) History of use of tobacco, alcohol or other drugs;
6) Parent/guardian custodial status;
7) Community referral needs.

f. Services provided to each child shall be culturally sensitive while addressing the identified risks and needs, and shall minimally include:
1) safety planning that is appropriate with respect to the child or adolescent's age, development, and education;
2) a specific safe, protected play area for children;
3) advocacy with community systems;
4) referral to community resources for needed services;
5) linkage and advocacy with the local school system to provide for ongoing educational needs;

6) parenting support for clients, if applicable; and
7) Children's groups using age-appropriate topics and based on established best practices.

g. Pursuant to Title 10A O.S. § 1-2-101, any person having reason to believe that a child under the age of eighteen (18) years is a victim of abuse or neglect shall report the matter promptly to the Department of Human Services.

V. CLIENT RECORDS

a. LIFT CAA shall have and maintain a master client index system containing the client's name and the victim services program's discreet numerical or letter identifier.
b. No identifying information such as initials, age, year of birth, or gender shall be part of the client ID. The same discreet identifier shall be the client ID that is entered into the Oklahoma Office of Attorney General database without further encryption.
c. In accordance with Oklahoma Office of Attorney General standards, LIFT CAA shall correct errors on record material by lining through, initialing the error, and inserting the correct material either above the error or at the end of the entry. LIFT CAA forbids the use of "white-out" or any action which obliterates the error.

VI. RECORD CONTENT – GENERAL

LIFT CAA client records shall contain, at a minimum, the following information:

a. Intake and screening information
    1) Client's name
    2) Date of initial contact/intake
    3) Pertinent medical information
    4) Emergency contact information
    5) History/nature of abuse, including an evidence-based, dangerousness assessment and screening for stalking and trauma, including a description of the event that precipitated the request for services and safety planning
    6) Screening for strangulation and head trauma, if applicable, information shall be given to client
    7) Perpetrator information, if known.
b. Service notes, which shall minimally include:
    1) Date
    2) Location
    3) Start time
    4) Duration
    5) Description of services provided delineated by time spent and service code, if applicable, or documentation of referral to other services or case management
    6) Signature of staff or volunteer providing the services.
c. The service plan, which shall focus on victim safety and well-being, and shall minimally include:

1) Goals and objectives of the client, which shall be agreed upon between the client and staff or volunteer.

d. Exit information, which shall minimally include:
   1) Documentation that the client participated in planning for the client's exit from program
   2) The reasons for the client's exit or departure
   3) Client and staff or volunteer dated signatures or an explanation if staff or the volunteer were unable to obtain the client's signature.

e. Each client record entry shall be legible.

f. Each client record entry shall be dated by the staff member or volunteer making the entry.

VII. RECORD CONTENT – SERVICE SPECIFIC

LIFT CAA client records for specific services shall conform to the following:

a. Crisis Intervention Services
   1) All face-to-face contacts with clients are documented and contacts with persons not receiving additional services shall be offered and documented. Documentation shall minimally include:
      i. Staff/Volunteer Name and signature;
      ii. Date, time, length, and location of intervention;
      iii. Safety planning based on risk;
      iv. Client's name, age, race, county of residence, and contact number if given;
      v. Protective order information if applicable;
      vi. Personnel involved such as police, hospital, etc.;
      vii. Summary of contact, including injuries observed and services requested;
      viii. Follow-up services shall be offered to all victims if victim safety is not compromised;
      ix. Outcome.
   2) All telephone contacts shall be documented. Documentation shall minimally include:
      i. Staff/Volunteer name;
      ii. Date, time and length of call;
      iii. Safety planning based on risk;
      iv. Caller's name and contact number, if given; however, no caller shall be required to give a name, phone number or any other identifying information as a condition to receive information or domestic violence, sexual assault or stalking services;
      v. Summary of the call, including services needed and offered;
      vi. Outcome.
   3) Contact information is kept by the program.
   4) Clients to be transported to shelter facilities shall be screened before the shelter referral is made. If the client is in immediate danger, or no safe housing is available, this screening may be initially waived. If the screening is waived, documentation shall reflect the reason(s) and the notification of such to the shelter.

b. Counseling, Support, and Advocacy
    1) LIFT CAA does not employ a counselor(s). Referrals are made to local counseling services. LIFT CAA does provide Support and Advocacy Services, with documentation to include:
        i. An assessment of the client's needs, completed by the third (3rd) advocacy session; if a client declines to participate, staff or volunteer shall document offer of services;
        ii. A service plan, completed by the fifth (5th) advocacy session; if a client declines to participate, staff or volunteer shall document offer of services;
        iii. A service plan review and update shall be completed at a minimum of once every six (6) months; if a client declines to participate, staff or volunteer shall document offer of services.
c. Sexual Assault Services
    1) For victims who continue in support sessions, a service plan shall be developed by the fifth (5th) visit; If a client declines to participate, staff or volunteer shall document offer of services; and
    2) Service plans shall be reviewed and updated at a minimum of once every six (6) months; if a client declines to participate, staff or volunteer shall document offer of services.
d. Where required information is not obtained, efforts to comply with the requirements of this subsection shall be documented in the client record.

VIII. CLIENT CONFIDENTIALITY

LIFT CAA's Victim Services Programs must comply with both State and Federal laws governing confidentiality and any exceptions to those laws.

a. State Law: Case or client records, files or notes, of a DVSA program shall be confidential and shall only be released under certain prescribed conditions (74 O.S. § 18p-3).
    1) The case records, case files, case notes, client records, or similar records of LIFT CAA or of any employee or trained volunteer of a program regarding an individual who is residing or has resided in such program or who has otherwise utilized or is utilizing the services of any domestic violence or sexual assault program or counselor shall be confidential and shall not be disclosed.
    2) For purposes of this subsection, the term "client records" shall include, but not be limited to, all communications, records, and information regarding clients of domestic violence and sexual assault programs.
    3) The case records, case files, or case notes of programs specified in paragraph 1 of this subsection shall be confidential and shall not be disclosed except with the written consent of the individual, or in the case of the individual's death or disability, of the individual's personal representative or other person authorized to sue on the individual's behalf or by court order for good cause shown by the judge in camera.
b. Federal Law:

1) The Violence Against Women Act universal grant conditions regarding confidentiality, Section 3 of VAWA, 34 USC §12291(b)(2) provides, in part: In order to ensure the safety of adult, youth, and child victims of domestic violence, dating violence, sexual assault, or stalking, and their families, grantees and subgrantees shall protect the confidentiality and privacy of persons receiving services. Grantees and subgrantees shall not: disclose, reveal, or release any personally identifying information or individual information collected in connection with services requested, utilized, or denied through grantee and subgrantee programs, regardless of whether the information has been encoded, encrypted, hashed or otherwise protected; or disclose, reveal, or release individual client information without the informed, written, reasonably time-limited consent of the person (or in the case of an unemancipated minor, the minor and the parent or guardian or in the case of legal incapacity, a court-appointed guardian) about whom information is sought, whether for this program or any other Federal, State, tribal, or territorial grant program, except that consent for release may not be given by the abuser of the minor, incapacitated person, or the abuser of the other parent of the minor. If a minor or a person with a legally appointed guardian is permitted by law to receive services without the parent's or guardian's consent, the minor or person with a guardian may release information without additional consent. If release of information is compelled by statutory or court mandate, grantees and subgrantees shall make reasonable attempts to provide notice to victims affected by the disclosure of information and take steps necessary to protect the privacy and safety of the persons affected by the release of the information. In no circumstances may an adult, youth, or child victim of domestic violence, dating violence, sexual assault, or stalking be required to provide a consent to release identifying information as a condition of eligibility for the services provided.
2) The Family Violence Prevention and Services Act universal grant conditions on confidentiality, 42 USC 10401 et seq. provides, in part: Personally, identifying information. The term personally identifying information has the meaning given the term in the Violence Against Women Act. In order to ensure the safety of adult, youth, and child victims of family violence, domestic violence, or dating violence, and their families, grantees and subgrantees under this title shall protect the confidentiality and privacy of such victims and their families. Subgrantees shall not disclose any personally identifying information collected in connection with services requested (including services utilized or denied), through grantee and subgrantee programs; or reveal personally identifying information without informed, written, reasonably time-limited consent by the person about whom information is sought, whether for this program or any other Federal or State grant program, which consent shall be given by the person, except in the case of an unemancipated minor, the minor and the minor's parent or guardian; or in the case of an individual with a guardian, the individual's guardian; and may not be given by the abuser or suspected abuser of the minor or individual with a guardian, or the abuser or suspected abuser of the other parent of the minor. If release of information is compelled by statutory or court mandate grantees and subgrantees

shall make reasonable attempts to provide notice to victims affected by the release of the information; and grantees and subgrantees shall take steps necessary to protect the privacy and safety of the persons affected by the release of the information.

3) Victims of Crime Act regulations on confidentiality applying to grantees, 28 CFR §94.115 provides in part: Sub-recipients of VOCA funds shall, to the extent permitted by law, reasonably protect the confidentiality and privacy of persons receiving services under this program and shall not disclose, reveal, or release any personally identifying information or individual information collected in connection with VOCA-funded services requested, utilized, or denied, regardless of whether such information has been encoded, encrypted, hashed, or otherwise protected; or individual client information, without the informed, written, reasonably time limited consent of the person about whom information is sought, except that consent for release may not be given by the abuser of a minor, incapacitated person, or the abuser of the other parent of the minor. If a minor or a person with a legally appointed guardian is permitted by law to receive services without a parent's (or the guardian's) consent, the minor or person with a guardian may consent to release of information without additional consent from the parent or guardian. If release of information is compelled by statutory or court mandate, SAAs or sub-recipients of VOCA funds shall make reasonable attempts to provide notice to victims affected by the disclosure of the information and take reasonable steps necessary to protect the privacy and safety of the persons affected by the release of the information.
4) Housing Assistance Emergency Solutions Grants, at 42 U.S.C. § 11375 (c)(5), require recipients to develop and implement procedures to ensure confidentiality of records pertaining to any individual provided family violence prevention or treatment services under this part and that the address or location of the family violence shelter project assisted under this part will not be made public without written authorization of the person or persons responsible for the operation of such shelter.
5) Stewart B. McKinney Homeless Assistance Act, at 42 U.S.C.§ 1130163, mandates that any victim service provider that is a recipient or subgrantee shall not disclose for purposes of the Homeless Management Information System (HMIS) any personally identifying information about any client. Subgrantees may be required to disclose for purposes of HMIS non-personally identifying information that has been de-identified, encrypted, or otherwise encoded. The Violence Against Women Act also contains a provision that specifies a domestic violence program provider shall not disclose any personally identifying information about any client to the HMIS.

IX. WAIVER OF CONFIDENTIAL INFORMATION

a. For a waiver of confidentiality to be valid, it must:
    1) Be voluntary;
    2) Relate only to the participant or the participant's dependents;
    3) Clearly describe the scope and any limitations of the information to be released;

4) Include an expiration date; and
5) Inform the participant that consent can be withdrawn at any time, orally or in writing.

b. LIFT CAA may only share the specific information the client allows in the release. The client chooses when, how and what personal information will be shared or not shared, and with whom.

c. Even when a court mandate requires LIFT CAA to disclose or release information about the client, the program may only share the minimum information necessary to meet the statutory or court mandate.

d. The program/LIFT CAA shall notify the victim of any disclosure and continue taking steps to protect the victim's safety and privacy.

e. A valid written release form for disclosure of client information shall have, at a minimum, the following elements:
   1) the specific name or general designation of the program or person permitted to make the disclosure;
   2) the name and title of the individual within the organization to which disclosure is to be made;
   3) the name of the client whose records are to be released;
   4) the purpose of the disclosure;
   5) a description of the information to be disclosed;
   6) the dated signature of the client or authorized representative or both when required;
   7) a statement of the right of the client to revoke the release in writing and a description of how the client may do so; and
   8) an expiration date, specified event or condition which, if not revoked before, shall ensure the release will last no longer than reasonably necessary to serve the purpose for which it is given. The reasonableness of this time period will depend on the specific situation.

f. Clients choosing to allow disclosure or sharing of information with police, prosecutors, the Oklahoma Fatality Review Board, or others indicated in the event that the client dies (due or not due to domestic violence) shall sign a “legacy clause” exception on a different form.

g. LIFT CAA will ensure confidentiality of client information, identity, and shelter location and govern the disclosure of information, including verbal disclosure, contained in client records. When a client record is established, the program shall discuss the confidentiality requirements with each client and maintain documentation in the client record that they have reviewed the circumstances under which confidential information may be revealed.

X. PHYSICAL SAFETY AND INTEGRITY OF CLIENT RECORDS

a. LIFT CAA shall safeguard client records and information contained therein against loss, theft, defacement, tampering, or unauthorized access or use. Information databases will be password-protected and client records will be stored in a secure, locking cabinet in the staff office, which will be locked whenever left unattended. No files will be left in public view.

b. Only those program staff members and volunteers who have completed required training shall have access to client files.
c. Client identifying information will not be released without written consent as described under Section IX.

XI. CLIENT RECORD, HANDLING, RETENTION, AND DISPOSAL

a. LIFT CAA's policies and procedures addressing the storage, retention period, and method of disposal of client records shall be compatible with protecting clients' rights against unauthorized confidential information disclosures.
    1) Client records shall not be maintained and/or stored at a location other than the certified locations without the prior written authorization of the Office of the Attorney General.
    2) Client records shall be stored in a manner in which they are easily retrieved by staff or volunteer as needed for providing and documenting services.
    3) All client files shall be maintained in a locked cabinet for a period of seven (7) years after the date of discharge.
    4) The client's file in its entirety shall be shredded in a manner as to maintain client confidentiality seven (7) years after the client's discharge. The Executive Director will assign the job of shredding the files to appropriate staff.

XII. PHYSICAL PLANT, PRIMARY ROLE

a. The primary role of LIFT CAA's Victim Services Programs is to offer safety as well as protect the confidentiality and privacy of victims of domestic violence, sexual assault or stalking and their dependent family members. All physical plants of LIFT CAA shall not be utilized in any manner that fails to guarantee the confidentiality, safety, and protection of the victims, their dependents and staff or volunteers.
b. LIFT CAA's Victim Services Programs do not currently serve batterers. In the event that LIFT CAA begins to provide services to batterers, the agency will develop written procedures to ensure that those services do not jeopardize the safety and psychological well-being of victims.
c. LIFT CAA's facilities shall meet the safety, zoning, and building code regulations required by local, state, and Federal authorities. An annual fire and safety inspection shall be conducted at all locations by local or state authorities. A record of the inspections will be kept at the administrative offices.
d. LIFT CAA's facilities shall each have a first aid kit and fire extinguishers, maintained annually. Alarm panel and sprinkler systems are to be inspected annually and maintained as necessary. Staff/volunteers shall know the exact location, contents and use of first aid kits.

XIII. DISASTER PROCEDURES

a. There shall be written procedures describing the emergency plans in case of a disaster, whether internal or external, or in case of threat to the safety of any client, staff or volunteer. Evacuation routes, inside sheltering sites, and fire extinguisher locations shall be posted.

b. Battery powered exit signs will indicate egress route at each location as determined by the fire marshal.
c. Battery powered emergency egress lights are mounted at various locations throughout the facilities as determined by the Fire Marshal. In the event that the emergency backup lighting fails, flashlights shall be placed in various accessible areas of the facilities.
d. Disaster Procedures have been created. All staff will be trained during orientation and yearly in these procedures.
e. Fire, tornado, bomb threat and intruder drills shall be conducted annually. The date, time, and type of drill shall be documented.

XIV. PERSONS WITH SPECIAL NEEDS

a. Pursuant to the Americans with Disabilities Act of 1990, LIFT CAA shall ensure that persons with disabilities are not excluded from services. Programs are required to integrate a person with a disability into agency services, unless providing separate services is the only way to offer equal opportunities for services.
b. Referrals must be offered when necessary; the following are written procedures for referrals of disabled persons who cannot be served on-site.
   1) Referrals for deaf or hearing impaired clients:
      i. A deaf or hearing-impaired individual will be admitted to the program following the standard intake procedure to the best of the agency's ability.
      ii. Sign language interpretation will be offered as services are available or, if applicable, by the person accompanying the client.
      iii. Staff shall consult the appropriate services that are hearing impaired accessible and present options to clients.
      iv. Staff will initiate the referral process, providing assistance in accessing referred services as well as follow-up to help ensure needs are met.
      v. In special cases involving domestic violence and the deaf and hearing-impaired, staff shall work with Adult Protective Services through the Department of Human Services in order to offer assistance to the client.
   2) Referrals for physically and/or mentally handicapped clients:
      i. A physically and/or mentally handicapped individual would be admitted to the program following the standard intake procedure to the best of the agency's ability.
      ii. Staff shall consult the appropriate services that are handicapped accessible and present options to clients.
      iii. Staff will initiate the referral process, providing assistance in accessing referred services as well as follow-up to help ensure needs are met.
      iv. In special cases involving domestic violence and the physically and/or mentally handicapped, staff shall work with Adult Protective Services through the Department of Human Services in order to offer assistance to the client.
   3) Referrals for blind or visually impaired clients:

i. A blind or visually impaired individual will be admitted to the program following the standard intake procedure to the best of the agency's ability.
ii. The agency will provide large print materials to clients who may be visually impaired.
iii. Staff shall consult the appropriate services that are visually impaired accessible and present options to clients.
iv. Staff will initiate the referral process, providing assistance in accessing referred services as well as follow-up to help ensure needs are met.
v. In special cases involving domestic violence and the blind or visually impaired, staff shall work with Adult Protective Services through the Department of Human Services in order to offer assistance to the client.

LIFT CAA Victim Services Programs will maintain current service agreements (to be renewed every three years) with available community services to offer access to a continuum of needed services for clients with special needs. If unable to establish a current service agreement with all appropriate resources in the community, efforts to do so or reasons/opinions why this is not or cannot be done will be documented. The programs will utilize existing Resource Guides as well as other available local, area, or state information to facilitate referrals for clients.

c. Service and companion animals should be allowed in facilities unless the animal poses a direct threat to the health/safety of others.
d. Auxiliary aids/services should be offered as necessary to ensure effective communication unless doing so would cause an undue burden (i.e., significant difficulty or expense) or fundamental alteration in services.
e. Alterations to existing buildings must be accessible to the maximum extent feasible. All newly constructed facilities must be accessible to persons with disabilities unless it is structurally impractical.

XV. PROGRAM ENVIRONMENT

The program environment shall meet the following conditions:

a. LIFT CAA's facilities are accessible by an all-weather road, have heating and air conditioning equipment adequate to maintain the temperature in areas utilized by clients at between 65ºF and 85ºF, and adequate ventilation and air circulation provided to assure an environment that will be comfortable for the clients.
b. LIFT CAA's facilities have water from an approved tested potable source, and commodes/ lavatories. The privacy of individuals shall be assured while using these facilities. All doors are easily opened from both sides.
c. LIFT CAA's facilities have adequate space in which to carry out the Victim Services Programs' goals and objectives, including outdoor areas and equipment when appropriate.
d. Facility sanitation is maintained to prevent offensive odors and insect infestation.
e. All facilities have emergency backup lighting.

f. Telephones are provided for the convenience of the staff or volunteers, and the necessary accommodation of clients.
g. The facilities have written policies and procedures addressing the use of any outdoor recreational space, including required supervision and the safety of children.
h. Smoking is not allowed in any indoor portion of any facility.
i. Toxic materials and dangerous substances, such as toxic cleaners, insecticides, and matches are stored in a non-client area, locked space where they are not accessible to children.
j. Combustible materials are stored in locked non-flammable containers.
k. The Poison Control Center's toll-free telephone number is posted and visible to staff and clients at all times.

XVI. TECHNOLOGY AND SYSTEM PLAN

LIFT CAA shall have a written plan regarding the use of technology to support and advance effective and efficient service and business practices. The plan shall include, but not be limited to:

a. Hardware and software
b. Security
c. Confidentiality
d. Backup policies
e. Assistive technology
f. Disaster recovery preparedness
g. Virus protection.

XVII. ADMISSION CRITERIA

a. The only criterion for admission into LIFT CAA's Victim Services Programs is victimization. Appropriate referrals will be made. Exit criteria will be contingent on the survivor's need for services or lack of participation. The survivor is free to leave the program at any time.
b. The criterion for admission of a minor child is that the child is admitted to the program with the parent/guardian (in most cases) when either or both is in need of safety due to domestic violence, sexual assault or stalking.
c. Exclusion criteria are that the victim is violent and/or abusive to staff, volunteer, parent, or other clients.

XVIII. PROGRAM MANAGEMENT, POLICIES AND PROCEDURES

a. LIFT CAA shall maintain written policies and procedures that describe each program service component, the rules clients are expected to follow for each component, and staff or volunteer duties.
    1) LIFT CAA does not operate a residential shelter facility; therefore, the agency/programs do not have a standard length-of-stay policy or policy for participation in housekeeping, food preparation, or other activities. LIFT CAA provides emergency housing through short-term hotel stays for victims in immediate danger or crisis. These stays are typically limited to a

few nights and are assessed on a case-by-case basis to ensure safety, with ongoing advocacy to assist the client in securing longer-term safe housing options through coordinated community referrals and partnerships.

b. Clients shall be given a copy of program rules and the provision of such shall be documented in the client record.
c. The programs shall have a written policy of the intent to comply with the Americans with Disabilities Act of 1990.

XIX. PROGRAM MISSION AND GOALS

a. LIFT CAA's Victim Services Programs shall have a written mission statement, and annually state in writing the programs' goals.
b. The annual program goals shall be approved by the agency's Board of Directors each year and shall be disseminated to staff and volunteers.

XX. ANNUAL PROGRAM EVALUATION

a. LIFT CAA shall conduct an annual evaluation of its Victim Programs services, facilities, and policies and procedures, covering the period between July 1 - June 30. The evaluation shall include an assessment to identify special populations of victims of sexual assault, domestic violence and stalking who are underserved or have special needs (included on the Advocacy and Supportive Services Feedback form). This annual evaluation shall be carried out according to the following plan of evaluation:
    1) Data to be reviewed shall include: the number of clients served, type of victimization, services provided, annual staff evaluations, and compilation/trending of responses to the Advocacy and Supportive Services Feedback form, surveys, and other programmatic information (such as reports submitted to funding sources, progress reporting, financial statements, etc.).
    2) The Victim and Youth Services Director will compile the data collected by staff, which assistance provided by LIFT CAA's Planning Department as needed. This evaluation data will be submitted to the Executive Director and Board of Directors for review and approval. Upon review and approval by the Board of Directors, the evaluation will be submitted to the Oklahoma Office of the Attorney General on or before December 31 each year. The Annual Evaluation made available to staff and volunteers, who will be able to ask questions and address any concerns.

XXI. CRITICAL INCIDENTS

All staff and volunteers are required to provide documentation and report all critical incidents.

a. A Critical Incident is defined as one occurrence or set of events that is not consistent with the routine care of a client, the routine services provided by or operations of LIFT CAA, or the safety/security of the facility. Incidents include accidents, unusual occurrences, or situations that might result in injury to a person or damage the property or equipment. Incidents may involve clients, employees, visitors and other persons. An incident may involve multiple individuals and or results. Critical incidents which shall be reported include, but are not limited to: adverse drug events; self-destructive behavior; deaths and injuries to clients, staff, volunteers, and visitors; incidents involving medication; neglect or abuse of a client; fire; unauthorized disclosure of information; damage to or theft of property belonging to a client or the facility; other unexpected occurrences; or events potentially subject to litigation.

b. Each critical incident shall be recorded and monitored as follows:
    1) agency name;
    2) name and signature of the person(s) reporting the critical incident;
    3) Client ID(s) or staff member(s), volunteers and/ or property, involved in the critical incident;
    4) the date;
    5) time of the critical incident;
    6) physical location of the critical incident, if known;
    7) the name of the staff or volunteer the incident was reported to;
    8) a description of the incident;
    9) severity of each injury, if applicable, which shall be indicated as follows:
        i. no off-site medical care required or first aid care administered on-site;
        ii. medical care by a physician or nurse or follow-up attention required; or
        iii. hospitalization or immediate off-site medical attention was required.
    10) resolution or action taken, date action taken and signature of the agency director or authorized designee.

c. Critical incidents that shall be reported to the Office of the Attorney General are reported as follows:
    1) Critical incidents requiring medical care by a physician or nurse or follow-up attention and incidents requiring hospitalization or immediate off-site medical attention shall be delivered via fax or mail, including electronic mail, to the Office of the Attorney General Victims Services Unit within forty-eight (48) hours, or if the incident occurs on a weekend or holiday, the next business day of the incident being documented.
    2) Incidents involving disaster at a facility, death or client abuse shall be reported to the Safeline at 1-800-522-7233 immediately via telephone. The notification shall be followed with a written report from the reporting agency within twenty-four (24) hours of the incident and delivered via fax or mail, including electronic mail, to the Office of the Attorney General Victims Services Unit.

XXII. PERSONNEL POLICIES AND PROCEDURES

a. LIFT CAA has written policies and procedures governing the conditions of agency employment, to include appropriate screening and background inquiries to ensure client safety and confidentiality.

b. Prior to employment, LIFT CAA shall obtain an Oklahoma State Bureau of Investigation (OSBI) criminal history name search of employees to also include a search of the registries maintained pursuant to the Oklahoma Sex Offenders Registration Act and the Mary Rippy Violent Crime Offenders Registration Act. At least annually thereafter, LIFT CAA shall conduct a name search of employees against the registries maintained pursuant to the Oklahoma Sex Offenders Registration Act and the Mary Rippy Violent Crime Offenders Registration Act.

c. LIFT CAA's policies and procedures shall be accessible to all personnel and each shall be informed of personnel policies and procedures, and any other materials regulating or governing the conditions of their employment. Staff will complete an attestation of receipt of the policies and procedures upon hire/beginning work within the Victim Services Programs, as well as any revisions to the policies and procedures that may occur.
d. Written policies and procedures shall ensure personnel are informed of any changes to these aforementioned materials.

XXIII. NON-DISCRIMINATION

The agency's policies and procedures shall include provisions for non-discrimination with regard to the agency's relationship with personnel in accordance with applicable state and federal laws.

XXIV. SELECTION OF PERSONNEL

The methods for selecting personnel shall be described in the policies and procedures manual, and shall include, but not be limited to:

a. The processes for recruitment, selection and appointment; and
b. Written criteria demonstrably related to the position being filled.

XXV. JOB DESCRIPTIONS, PERSONNEL

LIFT CAA shall have written job descriptions for personnel defining the duties of, and minimum qualifications for, each position. Job descriptions will be reviewed and revised as appropriate.

XXVI. PERSONNEL RECORDS

The agency shall maintain record(s) for each staff member or volunteer selected and utilized; documentation shall minimally include:

a. Job description;
b. Employment application or resume;
c. Documentation of current qualifications and training as required and defined in the job description;
d. Duty or work assignment;
e. Record of hours worked or hours of service performed;
f. Record of participation in training;
g. Staff or volunteer performance evaluation(s);
h. Emergency notification information.

XXVII. SUPERVISION OF PERSONNEL

LIFT CAA has established in writing lines of supervision for all personnel.

XXVIII. PERFORMANCE EVALUATION OF PERSONNEL

LIFT CAA shall have policies and procedures mandating the evaluation of personnel employment and service performance. These policies and procedures shall minimally include:

a. performance evaluations shall be completed at least annually, to include an evaluation of the Executive Director;
b. defined reason(s) for any evaluation other than annual;
c. performance evaluations shall be in writing and based on the staff member's or volunteer's job description;
d. each evaluation shall be individually discussed with the staff or volunteer;
e. personnel shall have a documented opportunity to respond, in writing, to each of their individual performance evaluations;
f. both staff or volunteer and supervisor shall sign and date the performance evaluation; however, the evaluation document shall state the staff's or volunteer's signature does not necessarily constitute agreement with the evaluation content.

XXIX. VOLUNTEER POLICIES AND PROCEDURES

a. LIFT CAA shall have written policies and procedures governing volunteer utilization to include appropriate screening and background inquiries to ensure client safety and confidentiality. The agency's policies and procedures will be accessible to all personnel and each shall be informed of such, and any other materials regulating or governing the conditions of their volunteer service. There are no specific criteria such as related experience or education required to become a volunteer; the programs accept all concerned citizens who would like to be of service in their community. To be accepted into the program(s) and prior to providing services, volunteers must first undergo a thorough screening process consisting of an intensive interview and comprehensive background check through the Oklahoma State Bureau of Investigation and AmericanChecked – which includes a check for any traffic violations, social security number verification, criminal offenses nationwide, sexual offenders list, and warrants for arrest. This also includes a name search of direct services volunteers against the registries maintained pursuant to the Oklahoma Sex Offenders Registration Act and the Mary Rippy Violent Crime Offenders Registration Act, which will also be conducted at least annually thereafter. The interview process begins with a brief overview of the program such as program goals, expectations, and volunteer responsibilities. Volunteers who pass the screening process must then complete mandatory pre-service training.
b. LIFT CAA's policies and procedures shall include provisions for non-discrimination with regard to the agency's relationship with volunteers in accordance with applicable state and federal laws. All personnel shall have access to the Policies and Procedures and be informed of any changes. It is the policy of LIFT Community Action Agency, Inc. that no volunteer shall on the basis of race,

color, national origin, religion, sex (including pregnancy and sexual harassment), age (40 or older), disability, political affiliation, protected veteran status, genetic information and testing, sexual orientation, gender identity, Family Medical Leave, participation in protected activity, or any other characteristic protected by law, be excluded from participation in or be denied the benefits of, or otherwise be subjected to discrimination under any program or activity which the agency operates or is applying for funding. The agency shall recruit volunteers who are representative of the diversity in the local community and clients served.

c. Volunteers shall be utilized to offer direct or indirect services, appropriately supervised, with knowledge relevant to the volunteer's job duties.
d. The programs shall maintain record(s) for each volunteer selected and utilized. Documentation will minimally include:
    1. Duty or work assignment;
    2. Record of hours worked or hours of service performed;
    3. Record of participation in training; and
    4. Emergency notification information.

XXX. SUPERVISION OF VOLUNTEERS

a. LIFT CAA shall have in writing lines of supervision for all volunteers.
b. LIFT CAA shall ensure each volunteer has the knowledge relevant to the volunteer's job duties and is supervised pursuant to program policies and procedures.

XXXI. ORIENTATION – GENERAL, PERSONNEL AND VOLUNTEERS

a. LIFT CAA Victim Services Programs shall provide a minimum of thirty (30) hours orientation training that incorporates the use of adult learning techniques, (i.e., scenarios, role playing, shadowing) to familiarize new personnel and volunteers providing direct services with the program which includes, but is not limited to:
    1) Program goals and services of each service component;
    2) Program policies and procedures;
    3) Confidentiality, to include verbal confidentiality whether inside or outside the facility and client records;
    4) Facility safety and disaster plans;
    5) First aid kits and fire extinguishers, their location, contents and use;
    6) Universal precautions;
    7) Client rights;
    8) Domestic violence and its effects on victims and children;
    9) Power and control tactics of abuse;
    10) Dangerousness and lethality assessment including strangulation and head trauma;
    11) Crisis intervention techniques;
    12) Sexual assault;
    13) Stalking;
    14) Victim advocacy;

15) Parenting and disciplinary techniques for children who have been exposed to domestic violence and trauma;
16) Active and empathetic listening techniques including hotline skills;
17) Accessing resources needed by victims and their families including how to ensure services and access resources for persons with special needs including cognitive disabilities or who are deaf or hard of hearing, non-English speaking persons, or undocumented immigrants to include basic information on U Visas and T Visas;
18) Safety planning for adults and age appropriate safety planning for children;
19) Basic child development;
20) Legal and ethical issues;
21) Cultural Sensitivity;
22) Effects of Trauma including posttraumatic stress disorder;
23) Victim's use of force; and
24) Documentation of services.

b. Staff and volunteers providing indirect services and children's activities are required to complete orientation as prescribed by the Executive Director and Victim and Youth Programs Director, which shall include training on confidentiality and facility safety and disaster plans.
c. Orientation for personnel must take place within thirty (30) days of employment or prior to unsupervised direct client contact and services.
d. Volunteer orientation must occur within six (6) months or prior to unsupervised, direct client contact and services. The Executive Director of a facility may waive orientation training if documented that the staff or volunteer has completed the requisite program training within the past year.
e. Program Directors shall attend New Director Orientation and training offered by the Oklahoma Office of the Attorney General, within the first six (6) months of employment.

XXXII. IN-SERVICE AND ONGOING TRAINING FOR PERSONNEL AND VOLUNTEERS

a. LIFT CAA shall mandate, at the minimum, sixteen (16) hours of annual training of all staff, to include:
    1) Confidentiality, to include verbal confidentiality whether inside or outside the facility and client records;
    2) Facility safety and disaster plans;
    3) First aid kits and fire extinguishers, their location, contents and use;
    4) Universal precautions;
    5) Client rights; and
    6) Legal and ethical issues.
b. The remaining hours of annual training shall be related to domestic violence, sexual assault, stalking, batterers intervention and administration as prescribed and approved by the Executive Director.

c. LIFT CAA shall mandate a minimum of sixteen (16) hours annual training of all volunteers providing direct services related to domestic violence, sexual assault, and stalking as prescribed and approved by the Executive Director.

d. Staff and volunteers who provide indirect services and do not meet the requirements for staff and volunteers providing direct services as defined in OAC 75:15-1-2 shall receive annual training as prescribed by the Executive Director, but do not have a minimum number of training hours required.

e. Documentation of training must include the topic of the training, the name of the trainer(s), the date of the training, the length of the training session, the sponsor of the training, and approval of the training by the Executive Director of the agency.

XXXIII. PERSONNEL TRAINING, CHILDREN'S SERVICES

Prior to providing any direct services, children's services personnel shall receive the prescribed orientation training and minimally have one (1) year employment or volunteer experience in a child care or service related field, or an equivalent combination of education, training and experience in child care or development issues.

XXXIV. PERSONNEL TRAINING, SEXUAL ASSAULT SERVICES

Prior to providing any direct services or CLEET training, all sexual assault services staff or volunteers shall receive a minimum of six (6) hours classroom training in addition to basic orientation which shall include but not be limited to:

1) Sexual abuse within the family (i.e., incest, sibling abuse, marital and domestic relationship rapes)
2) Sexual assault outside the family (i.e., stranger, non-stranger, abuse by professionals, sexual harassment and bullying)
3) Sexual assault within institutions (i.e., nursing homes, residential facilities, prisons, military)
4) Commercial sexual exploitation (i.e., prostitution, trafficking, pornography, escort services)
5) Non-traditional client populations (i.e., males, same sex, bisexual or transgender victims, non-English speaking, undocumented immigrants, victims with cognitive disabilities or who are deaf or hard of hearing)
6) Other topics to increase skills such as post-traumatic stress syndrome as it relates to rape trauma, rape trauma syndrome, self-injury and alcohol and drug use.

XXXV. PERSONNEL TRAINING, COURT ADVOCATES

Prior to providing services, Court Advocates shall receive the prescribed orientation training, and training in the following:

1) protective orders (i.e. the requirements for obtaining an ex-parte emergency protective order and permanent protective order and an understanding of what happens after a protective order is issued);

2) full faith and credit;
3) the court process, including safety planning during this time;
4) at least three (3) hours of accompanied court time with a trained court advocate that includes observation of an ex parte emergency protective order hearing and a final protective order hearing.

XXXVI. GOVERNING AUTHORITY

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

XXXVII. DUTIES OF THE GOVERNING AUTHORITY

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

XXXVIII. GOVERNING AUTHORITY, MEETING MINUTES

a. Minutes of the governing authority shall be kept in written form; reviewed at the next following meeting; corrected if such is approved; and signed by the presiding or authorized officer.
b. Meeting minutes shall include, but are not limited to, recording of:

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

XXXIX. GOVERNING AUTHORITY, ORIENTATION

a. LIFT CAA shall provide a minimum of two (2) hours orientation training to members of the governing authority which includes, but is not limited to:
   1) Program goals and services of each service component;
   2) Program policies and procedures;
   3) Underlying philosophy [OAC 75:15-1-1.1];
   4) Confidentiality, to include verbal confidentiality whether inside or outside of the facility and client records;
   5) Client rights and grievance procedure;
   6) Legal and ethical issues;
   7) Overview of domestic violence, sexual assault and stalking;
   8) Open Meeting Act and recording of meeting minutes;
   9) Open Records Act;
   10) Rules, including standards and criteria to ensure multi-cultural needs of clients are met, used in certifying programs;
   11) Roles and responsibilities of the Executive Director; and
   12) Roles and responsibilities of the governing Board of Directors.
b. Orientation training shall take place within ninety (90) days of election to the governing Board.
c. Members of the governing Board providing volunteer direct or indirect services to clients shall receive the prescribed orientation and training required for program personnel in addition to the orientation set forth in this section.

XXXX. CLIENT RIGHTS

a. Each client shall be afforded all constitutional and statutory rights of all citizens of the State of Oklahoma and the United States, unless abridged through due process of law by a court of competent jurisdiction. Each program shall ensure each client has the rights which are listed below:
   1) Each client has the right to be treated with respect and dignity. This shall be construed to protect and promote human dignity and respect for individual dignity.
   2) Each client has the right to a safe, sanitary, and humane living environment.
   3) Each client has the right to a humane psychological environment protecting the client from harm, abuse, and neglect.

4) Each client has the right to an environment that provides reasonable privacy, promotes personal dignity, and provides physical and emotional safety.
5) Each client has the right to receive services suited to the client's needs without regard to race, sex, color, age, national origin, genetic information, religion, degree of disability, or legal status.
6) Each client, on admission, has the absolute right to communicate with a relative, friend, clergy, or attorney, by telephone or mail, at the expense of the program if the client is indigent.
7) Each client shall have and retain the right to confidential communication with an attorney, personal physician, or clergy.
8) Each client has the right to uncensored, private communications including, but not limited to, letters and telephone calls. Copies of any personal letter, sent or received, by a client shall not be kept in the client’s record without the written consent of the client.
9) No client shall be neglected or sexually, physically, verbally, or otherwise abused.
10) Each client shall have the right to practice free exercise of religious beliefs, and be afforded the opportunity for religious worship that does not infringe on the health or safety of others. No client shall be coerced into engaging in, or refraining from, any personal religious activity, practice, or belief.
11) Each client has the right to be provided with prompt, competent, appropriate services and an individualized service plan. The client shall be afforded the opportunity to participate in the creation of the client's service plan. The client may consent, or refuse to consent, to the proposed services.
12) The records of each client shall be treated as confidential. This confidentiality remains intact even after the client's death.
13) Each client has the right to refuse to participate in any research project or medical experiment without informed consent of the client, as defined by law. A refusal to participate shall not affect the services available to the client.
14) Each client has the right to assert grievances with respect to any alleged infringement of these stated rights of clients, or any other subsequently statutorily granted rights.
15) No client shall ever be retaliated against, or subject to, any adverse conditions or services solely or partially because of having asserted her or his rights as stated in this section.
16) Upon request, each client has the right to review the client's own records. Upon written request, each client has a right to receive a copy of the client's own records or authorize an attorney or other person to do so. The program must provide a copy within a reasonable amount of time. The portion of the client's records regarding mental health or substance abuse treatment, may only be released pursuant to the provisions of 43A O.S. § 1-109 and 42 CFR shall apply.
17) Each client has the right to know why services are refused and can expect an explanation concerning the reason why the client was refused particular services.
18) Each client has the right to voluntary services that are self-determined.

19) Each client has the right to decide whether or not to participate in supportive services offered by the program.
20) Each client shall be given a copy of these rights and the provision of such shall be documented in the client record.
21) The programs shall have written policies to ensure each client has received explanation of these rights.
22) Client rights shall be visibly posted in client areas of the facilities.
23) The Office of the Attorney General, in any investigation or program monitoring regarding client rights, shall have unimpeded access to clients, program records, and program staff or volunteers.

XXXXI. CLIENT GRIEVANCE POLICY AND PROCEDURES

a. LIFT CAA has a written client grievance policy providing for, but not limited to, the following:
   1) Written notice of the grievance and appeal procedure provided to the client; and, if involved with the client, to family members or significant others;
   2) Time frames for the grievance policy's procedures, which allow for an expedient resolution of client grievances as follows:
      i. Non-transitional living and non-shelter services timeframes for resolution of grievances by program staff or volunteers shall be fourteen (14) days unless appealed;
   3) Name(s) of the individual(s) who are responsible for coordinating the grievance policy and the individual responsible for or with the authority to make decision(s) for resolution of the grievance. In the instance where the decision maker is the subject of a grievance, decision-making authority shall be delegated:
      i. The LIFT CAA Executive Director (Rebecca Reynolds Porter) is responsible for coordinating the grievance policy. The Victim and Youth Services Director (Dianna Atwood) and/or the Executive Director are responsible for and have the authority to make decision(s) for the resolution of the grievance.
      ii. If the Victim and Youth Services Director (Dianna Atwood) is the subject of the grievance, decision-making authority will fall directly to the Executive Director (Rebecca Reynolds Porter). If a grievance is raised against the Executive Director that cannot be resolved through the informal and formal action process with the Program Director, the grievance will be directed to the Chairman of LIFT CAA's Board of Directors (William Smith). The Board Chairman (with assistance as needed by the Board Personnel Committee) shall have the responsibility for hearing grievances on matters involving the Executive Director.
   4) Provide for notice to the client that he or she has a right to make a complaint to the Office of Attorney General's Victim Advocacy and Services Unit;
   5) Clients shall be given a copy of the grievance policy, including the right to make a complaint to the Office of Attorney General, and the provision of such shall be documented in the

client record including the phone number, mailing address, and email address of the Victim Advocacy and Services Unit of the Office of the Attorney General;

6) Annual review of the grievance policy and procedures, with revisions as needed;
7) The mechanism to monitor the grievance process and improve performance based on outcomes will consist of an internal feedback loop. The Victim and Youth Services Director, who will be responsible for documenting all program grievances and steps taken during the process, will regularly report to the Executive Director, supervising Associate Director (if applicable), and Human Resources Director regarding all grievances reported. The Director will detail the circumstances concerning the grievance, process, and outcome (including staff and client input), facilitating discussion over improvements that could be made to garner more positive outcomes or even avoid the situation in the first place. These reports will be used to inform the annual review of the grievance policy and procedures, including whether revisions are needed.

XXXXII. CODE OF PROFESSIONAL ETHICS

a. Pursuant to 74 O.S. §§ 18p-1–18p-6, employees and volunteers of LIFT CAA have an ethical obligation to their clients.
b. LIFT CAA has adopted a written Code of Professional Ethics. The Code encompasses behavioral expectations and underlying philosophy set forth in the corresponding sections ("Mission" and "Philosophy") on page 1 of this document.
c. The Code of Professional Ethics includes (at a minimum) the following ethical standards:
   1) Confidentiality and Privacy, including legal and ethical obligations to clients with respect to internal and external entities;
   2) Guiding Values, including empowerment and autonomy, self-determination, integrity, compassion, empathy, non-judgment, respect for people's rights and dignity, and client-centered practice;
   3) Professional Competence, including knowledge, skills, experience, evidence-based and trauma-informed practices, cultural responsiveness, ongoing education, scope of competence, and duty to report the unethical conduct of colleagues to supervisors;
   4) Professional-Client Relationships, including boundaries, and conflicts of interest; and
   5) Social Responsibility, including non-discrimination, and fostering anti-oppressive, equitable, inclusive, safe, trauma responsive, non-violent environments.

LIFT COMMUNITY ACTION AGENCY, INC.
LIMITED ENGLISH PROFICIENCY PLAN/POLICY

LIFT Community Action Agency, Inc. (LIFT) will take reasonable steps to ensure that persons with Limited English Proficiency (LEP) have meaningful access and an equal opportunity to participate in our services, activities, programs and other benefits. The plan/policy of LIFT is to ensure meaningful communication with LEP clients and their authorized representatives. The plan/policy also provides for communication of information contained in documents and forms applicable to LIFT. All interpreters, translators and other aids needed to comply with this plan/policy shall be provided without cost to the person being served, and clients and their families will be informed of the availability of such assistance free of charge.

Language assistance will be provided through use of competent bilingual staff, interpreters, and arrangements with local organizations providing interpretation translation services, technology, or telephonic interpretation services. All staff will be provided notice of this plan/policy and procedure, and staff that may have direct contact with LEP individuals will be trained in effective communication techniques.

LIFT will conduct a regular review of the language access needs of our client population, as well as update and monitor the implementation of this plan/policy and its procedures, as necessary.

PROCEDURES:

1. IDENTIFYING LEP PERSONS AND THEIR LANGUAGE

LIFT will promptly identify the language and communication needs of the LEP person. If necessary, staff will use a language identification flyer (or "I speak…Language Identification Guide" available online at https://www.lep.gov/translation#toc-language-identification-and-i-speak-cards and on employee bulletin boards) to determine the language. In addition, when records are kept of past interactions with clients/residents or family members, the language used to communicate with the LEP person will be included as part of the record.

2. OBTAINING A QUALIFIED INTEPRETER

Dawn McDaniel, HR Director, 580-326-3351 will be responsible for:

(a) Assisting with locating translation services including technology;

> Dawn McDaniel will secure assistance, if needed, in operating the online translation program in order to communicate with individuals who have limited English proficiency.
>
> > Dawn McDaniel
> > 209 N. 4th St.
> > Hugo, Oklahoma 74743
> > 580-326-3351
>
> LIFT can also enlist the professional services of https://www.worldlingo.com/ for translation services after gaining approval from the LIFT Executive Director. The list of languages for translation are listed at http://translate.google.com/.

(b) Contacting the appropriate bilingual staff member to interpret, in the event that an interpreter is needed, if an employee who speaks the needed language is available and is qualified to interpret;

(c) Obtaining an outside interpreter if a bilingual staff or staff interpreter is not available or does not speak the needed language.

www.worldlingo.com may provide qualified interpreter services. The agency's services are available upon a case by case basis and will be determined by Dawn McDaniel, 209 N. 4th St., Hugo, Oklahoma, 580-326-3351, and approved by the Executive Director.

Some LEP persons may prefer or request to use a family member or friend as an interpreter. However, family members or friends of the LEP person will not be used as interpreters unless requested by that individual and **after** the LEP person has understood that an offer of an interpreter at no charge to the person has been made by the agency. Such an offer and the response will be documented in the person's file. If the LEP person chooses to use a family member or friend as an interpreter, issues of competency of interpretation, confidentiality, privacy, and conflict of interest will be considered. If the family member or friend is not competent or appropriate for any of these reasons, competent interpreter services will be provided to the LEP person.

3. PROVIDING WRITTEN TRANSLATIONS

(a) When translation of vital documents is needed, LIFT will submit those documents for translation to http://translate.google.com/. Original documents being submitted for translation will be in final form with updated and accurate information.

(b) Facilities will provide translation of other written materials, if needed, as well as written notice of the availability of translation, free of charge, for LEP individuals.

4. PROVIDING NOTICE TO LEP PERSONS

LIFT will inform LEP persons of the availability of language assistance, free of charge, by providing written notice in languages LEP persons will understand. This will be done by translating this document using http://translate.google.com/ as needed. At a minimum, notices/signs will be posted at main points of entry and on employee bulletin boards.

5. MONITORING LANGUAGE NEEDS AND IMPLEMENTATION

On an ongoing basis, LIFT will assess changes in demographics, types of services or other needs that may require reevaluation of this plan/policy and its procedures. In addition, LIFT will regularly assess the efficacy of these procedures, including but not limited to mechanisms for securing interpreter services, equipment used for the delivery of language assistance, complaints filed by LEP persons, feedback from community organizations, etc.

Confidentiality Agreement

In consideration of being employed by LIFT Community Action Agency, Inc., the undersigned hereby agrees and acknowledges:

1. That during the course of my employ there may be disclosed to me certain confidential information of the Agency, said confidential information consisting of :
   a. Technical Information: e.g. methods, processes, systems, formulas, lists, research data, computer programs, etc.
   b. Business Information: e.g. customer lists, pricing data, sources of supply and marketing production, or merchandising systems or plans, etc.
   c. Client Information and other related information.

2. I shall not during, or at any time after the termination of my employment with the Agency, use for myself or others, disclose or divulge to others, any confidential information, or any other data of the Agency in violation of this agreement.

3. That upon the termination of my employ from the Agency:
   a. I shall return to the Agency all documents relating to the Agency, including but not necessarily limited to: manuals, correspondence, customer lists, computer programs, ledgers, teaching materials and aids, books, magazines, videos, forms, files, handbooks, and all other materials and all copies therefor relating in any way to the Agency's business, or in any way obtained by me during the course of my employ. I further agree that I shall not retain any copies of the foregoing.
   b. The Agency may notify any future or prospective employer of the existence of this agreement.
   c. This agreement shall be binding upon me and my personal representatives and successors in interest, and shall inure to the benefit of the Agency, its successors and assigns.
   d. The unenforceability of any provision to this agreement shall not impair or affect any other provision.
   e. In the event of any breach of this agreement, the Agency shall have full rights to injunctive relief together with monetary damages in addition to any other existing rights, without requirement of posting bond.

All printed materials, written or produced for LIFT Community Action Agency, Inc. operational, educational, or marketing activities are considered confidential and may not be given to, used at, or sold to other individuals or companies.

______________________	______________________	________________
Employee Signature	Employee Name	Date
______________________	______________________	________________
Agency Representative	Name/Title	Date
______________________	______________________	________________
Witness	Name	Date

SMOKE FREE AND TOBACCO FREE POLICY

PURPOSE/POLICY

To comply with applicable laws and provide a smoke-free and tobacco free working environment.

All working locations will be designated as non-smoking/tobacco free areas and signs will be posted to that effect.

The Agency provides a smoke-free and tobacco free workplace environment, and therefore smoking and tobacco of any kind is prohibited on its premises. This includes, but is not limited to, smokeless tobacco, chewing tobacco products, cigarettes, cigars, pipes, electronic cigarettes, personal vaporizers, and any other electronic nicotine delivery systems.

LIFT CAA DRUG AND ALCOHOL ABUSE POLICY/TESTING PROGRAM

Effective December 10, 2019

PURPOSE/POLICY

LIFT CAA is committed to being a drug-free workplace. All employees are absolutely prohibited from unlawfully manufacturing, selling, distributing, dispensing, receiving, transporting, possessing or using controlled substances (including medical marijuana) or alcohol in the workplace. Subject to the terms of this Program, it is a violation of the agency's policy to be under the influence of alcohol, unauthorized legal drugs, or illegal drugs, or to engage in the illegal use of other controlled substances while on duty, in the agency workplace, or at any other worksite to which an employee may be assigned. Additionally, the agency prohibits the possession and use of any substance (including medical marijuana), whether legal or illegal, prescription or over-the-counter, that impairs an employee's ability to perform his or her job in a safe manner.

This Program does not create a contract of employment. Employment with the agency remains "at will" and for no fixed period of time. As such, the employee may terminate his or her employment at any time and at his or her discretion. Likewise, the agency may terminate an employee's employment at any time and at its sole discretion, with or without notice or cause.

This Program applies to all contractors, employees and applicants for employment with the agency, including employees covered by Department of Transportation (DOT) testing program or any other testing program. Violations of any provision of this Program may result in disciplinary action, up to and including discharge. Compliance with the Program is a condition of continuing employment.

The agency reserves the right to change the provisions of this Program at any time, in accordance with the law.

DEFINITIONS

Agency property – means any agency workplace or any other worksite to which an employee may be assigned, including while in a vehicle.

Alcohol – means ethyl alcohol or ethanol.

Confirmation Test – means a drug or alcohol test of the original sample to substantiate the results of a prior drug or alcohol test on the same sample and which uses different chemical principles and is of equal or greater accuracy than the prior drug or alcohol test. Where a breathalyzer test is utilized, a confirmation test means a second sample test that confirms the prior result.

Drug – means amphetamines, cannabinoids, cocaine, phencyclidine ("PCP"), hallucinogens, methaqualone, opiates, barbiturates, benzodiazepines, synthetic narcotics, designer drugs, or a metabolite of any of the substances listed herein.

Medical Review Officer ("MRO") – means a qualified individual who is responsible for receiving results from a testing facility which have been generated by the agency's drug or alcohol testing program, and who has knowledge and training to interpret and evaluate an individual's test results together with the individual's medical history and any other relevant information.

Prescribed Drug – means any substance prescribed for individual consumption by a licensed medical practitioner in compliance with both federal and state laws.

Program – means this Drug and Alcohol Policy and Testing Program adopted by the agency.

Safety-Sensitive - means any job that includes tasks or duties that could affect the safety and health of the employee performing the task or others including, but not limited to, any of the following:

a. the handling, packaging, processing, storage, disposal or transport of hazardous materials;

b. the operation of a motor vehicle, other vehicle, equipment, machinery or power tool;

c. repairing, maintaining or monitoring the performance or operation of any equipment, machinery or manufacturing process, the malfunction or disruption of which could result in injury or property damage;

d. the operation, maintenance or oversight of critical services and infrastructure including, but not limited to, electric, gas, and water utilities, power generation or distribution;

e. the extraction, compression, processing, manufacturing, handling, packaging, storage, disposal, treatment or transport of potentially volatile, flammable, combustible materials, elements, chemicals or any other highly regulated component;

f. carrying a firearm; or

g. direct child care.

TYPES OF TESTING

The agency believes that drug and alcohol testing is a means of enforcing this Program. Such testing is intended to protect the health and safety of employees, clients, program participants and the public at large and serve as a deterrent to the abuse of drugs and alcohol by the agency's employees. Applicants and employees may be required to submit to drug and/or alcohol testing in the following situations:

1. Pre-Employment and Transfer/Reassignment Testing – The agency may require an applicant to undergo drug or alcohol testing and may use a refusal to undergo testing or a failed test result as a basis for refusal to hire the applicant. The agency may also require an employee who transfers to a different position or job, or who is reassigned to a different position or job, to undergo drug or alcohol testing.

2. Employee Reasonable Suspicion Testing – The agency may require an employee to undergo drug or alcohol testing at any time it reasonably believes that the employee may

be under the influence of drugs or alcohol, including, but not limited to, the following circumstances: (a) drugs or alcohol on or about the employee's person or in the employee's vicinity; (b) conduct on the employee's part that suggests impairment or influence of drugs or alcohol; (c) a report of drug or alcohol use while at work or on duty; (d) information that an employee has tampered with drug or alcohol testing at any time; (e) negative performance patterns; or (f) excessive or unexplained absenteeism or tardiness.

3. Employee Post-Accident Testing – The agency may require an employee to undergo drug or alcohol testing if the employee or another person has sustained an injury while at work or property has been damaged while at work, including damage to equipment.

4. Employee Random Testing – The agency may require an employee or all members of an employment classification or group to undergo drug or alcohol testing at random and may limit its random testing programs to particular employment classifications or groups.

5. Employee Scheduled, Fitness-for-Duty, Return from Leave and Other Periodic Testing – The agency may require an employee to undergo drug or alcohol testing if the test is conducted as a routine part of a routinely scheduled employee fitness-for-duty medical examination, or in connection with an employee's return to duty from leave of absence.

6. Employee Post-Rehabilitation Testing – The agency may require an employee to undergo drug or alcohol testing for a period of time following an employee's return to work after a positive test, or following participation in a drug or alcohol dependency treatment program. This does not guarantee that an employee may be permitted to return to work following such positive test or participation in a program.

TESTING METHODS AND COLLECTION PROCEDURES

Alcohol Tests

Initial and confirmation alcohol tests may be performed using any type of sample from which a measurement of alcohol content in the person's body can be made, including without limitation, breath, saliva, blood, or urine samples. The collection of samples will be performed under reasonable and sanitary conditions, with due regard to the privacy of the individual being tested, and in a manner reasonable calculated to prevent substitutions or interference with the collection or testing of a reliable sample. The sample collection will be documented, including labeling of the sample to reasonably preclude the probability of erroneous identification of test results and an opportunity for the employee or prospective employee to provide notification of any information that the employee or prospective employee considers relevant to the test (including but not limited to identification of current or recently used prescription or nonprescription drugs or other relevant medical information).

Alcohol testing facilities will use internal chain of custody procedures to maintain control and accountability of specimens from receipt through completion of testing, reporting of results, during storage (if applicable), and continuing until final disposition of specimens. Sample collection, storage, and transportation to the place of testing shall be performed so as reasonably to preclude the probability of sample contamination or adulteration.

All positive initial alcohol screening tests will be confirmed prior to any disciplinary action taken by the agency.

An employee or applicant whose confirmation alcohol test was conducted on breath analyzed by an evidential breath testing device (EBT) does not have the right to appeal a positive test result. An employee or applicant whose alcohol swab test was positive does not have the right to appeal a positive test result. An employee whose confirmation alcohol test was conducted by blood analyzed by gas chromatography has only the right to appeal a positive test result by requesting a re-test within two (2) hours of receiving notice of the failed test result in order to challenge the results of the failed test. The request must be made in a timely manner. The employee or applicant shall pay all costs of the re-test, unless it reverses the findings of the failed test. In such case, the agency will reimburse the individual for the costs of the re-test. The individual has no other right to appeal a failed alcohol test.

Drug Tests

After an employee or applicant has been identified for drug testing, samples of the tested individual's urine, hair, or saliva may be collected on agency property or at a designated collection site. The collection of samples will be performed under reasonable and sanitary conditions and with due regard to the privacy of the individual being tested. After the specimen is taken at the collection site for testing, it may be sent to a laboratory where it will be tested.

Collection and testing facilities will maintain a written record of the chain of custody of the sample from the time of the collection of the sample until the sample is no longer required.

An employee or applicant whose drug test result is positive has the right to request a confirmation test or re-test within twenty-four (24) hours of receiving notice of a positive test in order to challenge the results of a positive test. The employee or applicant shall pay all costs of the confirmation test or re-test, unless it reverses the findings of the challenged positive test. In such case, the agency will reimburse the individual for the costs of the confirmation test or re-test. The individual has no other right to appeal a positive drug test.

C●NFIDENTIALITY ●F TEST RESULTS

Records of all drug and alcohol test results and related information maintained by the agency shall be the property of the agency and, upon the request of the applicant or employee tested, will be made available for inspection and copying to the applicant or employee.

Records of all drug and alcohol test results and related information maintained by the agency may be released by the agency for any of the following purposes: (1) as admissible evidence by the agency or the individual tested in a case or proceeding before a court of record or administrative agency if either the agency or the individual tested is a named party in the case or proceeding; (2) in order to comply with a valid judicial or administrative order; or (3) to agency employees, agents, and representatives who need access to such records in the administration of the testing program.

Except in these specified circumstances, the agency will not release such records to any person other than the applicant, employee, or the MRO.

Neither the testing facility (including any agent, representative, or designee of the testing facility) nor the MRO shall disclose to the agency, based on the analysis of a sample collected from an applicant or employee for the purpose of testing for the presence of drugs or alcohol, any information relating to the general health, pregnancy, or other physical or mental condition of the applicant or employee.

Nothing in this Program shall preclude the agency from sharing drug or alcohol testing results of temporary employees or applicants for temporary employment with the temporary agency.

SEARCHES AND INSPECTION

For the purpose of assuring compliance with this Program and other agency policies, employees may be asked to submit to a search of any vehicle brought onto agency property (whether locked or unlocked), to submit to a search of any packet, package, purse, briefcase, lunch box, or other container brought onto agency property, or to submit to a search of desk, file, briefcase, locker, or other container provided by the agency – even if such briefcase, desk, locker or other container is locked. Refusal to consent to a search or inspection may result in disciplinary action, up to and including discharge.

PROHIBITED ACTIVITIES AND DISCIPLINARY ACTION

As part of this Program, the following activities are prohibited. Applicants will normally not be hired and employees will normally be subject to disciplinary action, up to and including discharge, for any violation of this Program, including, but not limited to, the following reasons:

Impairment – Being under the influence of any substance (including medical marijuana), alcohol, or illegal drugs, that impair the employee's sight, hearing, balance, reaction, reflex, or judgment while on agency property or while performing agency business is prohibited and may result in disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation.

Use and Possession – The use, sale, possession, transfer, or purchase of drugs (including medical marijuana) or alcohol on agency property or while performing any agency business is prohibited and will normally result in disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation. The agency prohibits the use, sale, possession, transfer, or purchase of any substance (including medical marijuana) that may impair an employee or cause the employee to be a safety risk. However, the proper and appropriate use of legal drugs by the appropriate person and in the appropriate method is not prohibited.

Prescription Drugs – Bringing a prescribed drug onto agency property by any person other than the one for whom it is prescribed is prohibited and may result in disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation. Prescription drugs may be used only in the manner, combination, and quantity prescribed. The employee, however, must not be impaired or be a safety risk while taking prescription drugs.

Marijuana - Although marijuana may be permitted by some states, including Oklahoma, for "medical" or "recreational" purposes, the agency is a federal contractor/federal grant recipient that is subject to the federal Drug-Free Workplace Act and, therefore, necessarily prohibits the use of marijuana, an illegal drug under federal law, by employees and prospective employees for any reason. In the event that the agency were to have a program or programs which were not subject to the federal Drug-Free Workplace Act or other similar federal restrictions, the agency will comply with applicable Oklahoma state laws and will not discriminate against employees who possess a valid medical marijuana license, except those employed in Safety-Sensitive positions or as otherwise provided by applicable laws.

Positive Test – An employee who tests positive for alcohol, illegal drugs, or illegally used chemicals will normally be subject to disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation. An applicant whose drug or alcohol test result is positive may be refused employment.

Refusal To Undergo Testing – Refusing to undergo drug or alcohol testing is prohibited and will normally result in disciplinary action, up to and including discharge, and such discharge may be considered misconduct for purposes of unemployment compensation. An applicant who refuses to submit to a drug or alcohol test may be refused employment. Adulteration of a specimen or of a drug or alcohol test is considered a refusal to test.

Refusal To Consent To Testing – Refusing to execute any consent, release, or other document in connection with this Program is prohibited and will normally result in disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation. An applicant who refuses to execute any consent, release, or other document in connection with this Program may be refused employment.

Refusal To Consent To Search – Refusing to consent to a search or inspection conducted pursuant to the provisions of this or other agency policies is prohibited and will normally result in disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation.

Tampering – In the event that it is determined that a sample has been diluted or otherwise tampered with, the employee may be, depending upon the circumstances, subject to disciplinary action, up to and including discharge, and such discharge will be considered misconduct for purposes of unemployment compensation. In the event that it is determined that an applicant's sample has been diluted or otherwise tampered with, the applicant may be refused employment.

RETURN TO WORK

Employees who are permitted to return to work after testing positive for drugs or alcohol, participating in a drug or alcohol treatment program, or violating any other provision of this Program will be required to execute a Return to Work Agreement. However, nothing in this

Program shall be construed to require the agency to allow an employee to return to work who has violated this Program. This Return to Work Agreement will include, among other items, a treatment program, an agreement to unannounced screening for substance abuse, and a statement of expected behavior.

LEGAL DRUGS
It will be considered an illegal drug and against agency policy to use prescription drugs other than in the manner, combination, and quantity prescribed or by any person other than the one for whom they are prescribed, or to use over-the-counter drugs other than in the manner, combination, and quantity as directed on the packaging.

The agency prohibits the possession and use of any substance, whether legal or illegal, prescription or over-the-counter, that impairs an employee's ability to perform his or her job in a safe manner. Employees adversely affected by their use of any legally obtained drug (prescription or over-the-counter) may not be allowed to perform their regular job in such a condition. Employees who are unable to work safely due to impairment resulting from legal drugs may be suspended without pay until the impaired condition has passed if the employee is unable to be temporarily transferred to another job until the impaired condition has passed.

LIFT CAA
Policy for Response to Workplace Related Incidents of Sexual Misconduct, Domestic Violence, and Dating Violence
(This policy applies to OVW funded staff.)

I. Purpose

LIFT CAA institutes this policy as part of its commitment to a safer and more supportive organizational climate and to the prevention and reduction of the incidence and effects of domestic violence, sexual violence, and stalking [hereinafter "violence"] at the workplace. LIFT CAA recognizes violence presents unique issues for its employees, volunteers, consultants, and contractors [hereinafter "employees"]. Violence can be workplace-related even if incidents occur elsewhere. It crosses economic, educational, cultural, age, gender, racial, and religious lines and occurs in a wide variety of contexts.

The purposes and goals of this policy are to:

- Support a comprehensive workplace education and training program to prevent violence and promote healthy relationships for employees and their families;
- Institutionalize responsive policies and procedures to assist and support employees who are impacted by violence;
- Create a supportive and healthful work environment that helps employees to avoid the use of violence in any context.

II. Definitions

- "Domestic violence" is a pattern of coercive behavior, including acts or threatened acts, that is used by a perpetrator to gain power and control over a current or former spouse, family member, intimate partner, or person with whom the perpetrator shares a child in common. Domestic violence includes, but is not limited to: physical violence, injury, or intimidation; sexual violence or abuse; emotional and/or psychological intimidation; verbal abuse; threats; harassment; stalking; or economic abuse and control.
- "Sexual violence" is a range of behaviors, including but not limited to: sexual harassment; a completed nonconsensual sex act (i.e. rape); an attempted nonconsensual sex act; abusive sexual contact (i.e. unwanted touching); and non-contact sexual abuse (e.g. threatened sexual violence, exhibitionism, verbal harassment). Some or all of these acts may also be addressed in LIFT CAA's Harassment Policy. Sexual violence is any sexual act or behavior that is perpetrated against someone's will when someone does not or cannot consent. Survivors of sexual violence may know the perpetrator(s), such as a coworker or a supervisor, and/or may be involved in a dating or marital relationship with the perpetrator, or the perpetrator may be unknown to the survivor. Consent is not given when a perpetrator uses force, harassment, threat of force, threat of adverse personnel action, coercion, or when the survivor is asleep, incapacitated, or unconscious.
- "Stalking" refers to harassing, intimidating or threatening conduct that causes the survivor to fear for his or her safety or the safety of a family member, or would cause a reasonable person in a similar situation to fear for his or her safety. Stalking conduct includes, but is not limited to: following or spying on a person; appearing at a person's home or work;

engaging in unwanted, harassing, or threatening phone calling, emailing, texting, etc.; waiting at places in order to make unwanted contact with the survivor or to monitor the survivor; leaving unwanted items, presents, or flowers for the survivor; and posting information or spreading rumors about the survivor on the internet, in a public place, or by word of mouth. Stalking may occur through use of technology including, but not limited to: email; voicemail; text messaging; and use of GPS and social networking sites.

- "Survivor" or "victim" is an individual who is currently subject to, or has in the past been subjected to, domestic violence, sexual violence, stalking or other forms of violence.
- "Perpetrator" is an individual who commits or threatens to commit an act of domestic violence, sexual violence, or stalking, including unwarranted violence against animals.
- "Protection or restraining order" allows a survivor to petition the court for protection from a perpetrator, as well as establish custody and visitation guidelines and provide for other forms of support, like rent or mortgage payments, which last for the duration of the order. Protection orders may also be issued in criminal cases as a condition of probation or condition of release particularly in a domestic violence, sexual violence, dating violence, or stalking related crime. In addition, some states have enacted laws that allow employers to apply for protection orders to prevent violent, harassment, or stalking of their employees.
- "Workplace-related incidents" of domestic violence, sexual violence, dating violence and stalking include acts, attempted acts, or threatened acts by or against employees, the families of employees, and/or their property, that imperil the safety or well-being of any person associated with an employee of LIFT CAA, regardless of whether the act occurred in or outside the organization's physical workplace. An employee is considered to be in the workplace while in, or using the resources of LIFT C.A.A's offices or facilities, using its equipment or vehicles, engaging in approved telework, on work-related travel, or otherwise conducting business on behalf of LIFT CAA. The availability and nature of the response to a work-lace-related incident may depend on the location at issue.
- "Workplace Safety Plan" is a strategy developed in collaboration with a victim and victim service provider to implement workplace safety options.

III. Persons Covered by this Policy

Persons covered by this policy include full, part-time or temporary employees funded by OVW, interns, contractors, consultants, or volunteers engaged by LIFT CAA's Safe Place Healing Hearts Program in any workplace location as defined above.

IV. Statement of Confidentiality

LIFT CAA recognizes and respects an employee's right to privacy and the need for confidentiality and autonomy. LIFT CAA shall maintain the confidentiality of an employee's disclosure regarding violence to the extent allowed by law, and unless to do so would result in physical harm to any person, and/or jeopardize safety within the workplace. When information must be disclosed to protect the safety of individuals within the workplace, LIFT CAA shall limit the breadth and content of such disclosure to information reasonably necessary to protect the safety of the disclosing employee and others, and to comply with the law. LIFT CAA shall provide advance notice to the employee who disclosed information, to the extent possible, if the disclosure must be shared with other parties in order to maintain safety in the workplace or elsewhere. LIFT CAA shall also provide the employee with the name and title of the person whom LIFT CAA intends to share the employee's statements, and shall explain the necessity and purpose regarding said disclosure.

When information must be disclosed to protect the safety of individuals within any location or event controlled by LIFT CAA, LIFT CAA shall limit the breadth and content of such disclosure to information reasonably necessary to protect the safety of the disclosing employees and others, and to comply with the law. LIFT CAA shall provide advance notice to the employee who disclosed information, to the extent possible, if the disclosure must be shared with other parties in order to maintain safety in any location or event controlled by LIFT CAA or elsewhere.

LIFT CAA shall also provide the employee with the name and title of the person to whom LIFT CAA intends to share the employee's statements, and shall explain the necessity and purpose regarding said disclosure.

V. LIFT CAA Responses to Violence

A. Responses to Victims

i. Non-Discrimination and Non-Retaliation

LIFT CAA will not discharge or in any manner discriminate or retaliate against an employee because of the employee's status as a victim of domestic violence, sexual violence, or stalking, if the victim provides notice to the organization of the status, or the organization has actual knowledge of the status.

LIFT CAA will not retaliate against a victim of domestic violence, sexual assault, or stalking for requesting leave or a reasonable accommodation (see Section V(A)(ii)), regardless of whether the request was granted.

ii. Leave and Other Reasonable Accommodations and Assistance

LIFT CAA recognizes that victims of domestic violence, sexual assault, stalking and dating violence may need time off to obtain or attempt to obtain a protection or restraining order or any other legal assistance to help ensure his or her health, safety, or welfare or that of his or her child.

An employee must provide reasonable advance notice to LIFT CAA of the need to take time off unless advance notice is not feasible. LIFT CAA may require the employee to provide documentation or other certification verifying that the employee was a victim of violence. To request leave, employee should contact their supervisor.

LIFT CAA will maintain the confidentiality of a person who requests leave under this policy, to the extent allowed by law.

iii. Work Performance

LIFT CAA recognizes that employees who are victims of violence may experience temporary difficulty fulfilling job responsibilities. If LIFT CAA becomes aware that an employee's work performance or conduct has been impacted by domestic violence, sexual assault, or stalking, LIFT CAA will offer support to the employee and work in collaboration with the employee to address the issues, in accordance with established policies within the workplace. LIFT CAA may develop a work plan with employee, provide referrals to support or advocacy agencies, and maintain a separate and confidential record of employee's status as a victim of domestic violence, sexual assault and stalking to ensure to victim that his or her rights and privileges of employment are not impacted or compromised as a result of the violence.

iv. Protection and Restraining Orders

LIFT CAA recognizes that a victim of violence may seek an order of protection, or may receive a protection or restraining order, as part of his or her efforts to become safe and as part of his or her workplace safety plan. LIFT CAA recognizes that the workplace may or may not be included on an order as a location from which a perpetrator must remain away. If an employee chooses to disclose the existence of a protection or restraining order to LIFT CAA, LIFT CAA may, wherever possible, assist the employee to enforce his or her order, shall archive said order in a confidential and separate file from employee's personnel file, and, if applicable, may assist employee to gather documentation from the workplace, such as emails or voice messages, that could support the employee's efforts in the justice system or otherwise to obtain or maintain safety from a perpetrator.

B. Reporting by Employees with Information About Violence

Employees who have information about or witness an act of violence perpetrated by another employee, or who have information about or witness violence against an employee, are encouraged to report all information to the Human Resource Director.

LIFT CAA will not retaliate against, terminate, or discipline any employee for reporting information about alleged incidents of violence, as defined in this policy that may have been committed by any other employee, including a member of management. Prohibited acts of retaliation include, but are not limited to, demotion or withholding of earned pay, as well as acts of personal retaliation, such as those related to an employee's immigration status or sexual orientation, for example.

An employee who believes he or she has been subjected to adverse action as a result of making a report pursuant to this policy should contact the Human Resource Director.

C. Responses to Employees Who Commit Violence

If LIFT CAA receives information that alleges or suggests that an employee has committed an incident of workplace-related violence, as defined in this Policy, or if any manager receives information that any employee has engaged in any incident of workplace related violence, then the matter shall be referred to the Human Resource Director for the purpose of investigating the information or allegation.

LIFT CAA shall conduct an immediate investigation of the information or allegation, which investigation shall be completed within 45 days of receipt of the information or allegation concerning the alleged incident of violence.

Every employee shall have a duty to cooperate with the investigation, and failure to do so will result in disciplinary action being taken against the uncooperative employee up to and including termination. Additionally, every employee has the duty to be truthful and must disclose all information known to the employee when requested to do so by any person designated by LIFT CAA to investigate an alleged incident of violence. Any employee who fails to be completely truthful or who withholds information shall be subject to disciplinary action up to and including termination.

At the conclusion of the investigation conducted by LIFT CAA, the investigator shall report their findings to the Executive Director. If the investigator concludes, by a preponderance of the evidence, that the employee has engaged in a workplace-related incident, as defined in this Policy, then that employee shall be subject to disciplinary action up to and including termination. Employees are prohibited from utilizing any workplace resources, such as work times, phones, email, computers, fax machines or other means to threaten, harass, intimidate, embarrass or otherwise harm another person.

An employee who is subject to a protection or restraining order, or a named defendant in a criminal action as a result of a threat or act of domestic violence, sexual violence, or stalking must notify the LIFT CAA Human Resources Department immediately regarding the existence of such criminal or civil action. Failure to disclose the existence of such criminal or civil actions in these circumstances will result in disciplinary action, up to and including termination from employment.

VI. Reporting by Employees Who Are Victims

Employees who are victims of domestic violence, sexual assault, and stalking, and employees who are concerned about coworkers who might be victims, are encouraged to provide a report to LIFT CAA. LIFT CAA has designated the Human Resource Director as the person to whom such reports should be made. LIFT CAA's designated employee shall provide community referrals and resources to employees in order to assist employees with concerns or experiences regarding violence.

VII. Reporting Violation of Policy

A person who wishes to report a violation of this policy should contact the Human Resource Director. LIFT CAA will not subject employees who report violence or report a violation of this policy to work-related or personal retaliation as described in Section V(B). Any allegations of violations of this policy will be immediately investigated in accordance with the timeline and procedure outlined in Section V(C).

LIFT Community Action Agency

Personally Identifiable Information or Confidentiality Breach Response Policy

In the course of conducting routine operations, LIFT Community Action Agency's Victim Services Programs may create, collect, use, process, store, maintain, disseminate, disclose, or dispose of Personally Identifiable Information (PII). This can include PII (stored electronically or in paper files) on individuals, including victims served, their families, their placement providers, Board Members, employees, and other people the agency/programs have a relationship with or may need to contact in the course of serving clients or conducting work. As defined in 2 CFR § 200.79, PII is information that can be used to distinguish or trace an individual's identity, either alone or when combined with other information that is linked or linkable to a specific individual.

The Victims Services Programs have Confidentiality Policies and Procedures to safeguard such information. The programs comply with all applicable laws, and PII collected is used fairly, stored safely, and not disclosed unlawfully. PII shall be limited to personnel who need access to conduct program work; appropriate security is in place to avoid unauthorized sharing of information. While such an event is unlikely, the Victim Services Programs have in place procedures to prepare for and respond to a breach of confidentiality or PII (actual or imminent), which are set forth in this policy.

In the event of an actual or imminent breach of security leading to the accidental or unlawful destruction, loss, alteration, unauthorized disclosure of, or access to PII, the Victim Services Program Director and Program Staff shall promptly assess the risk to people's rights/freedoms and develop a mechanism to report the breach to the impacted victim(s) as well as reporting to the awarding agency (District Attorneys Council, Office on Violence Against Women, and Oklahoma CASA Association) no later than 12 hours after the occurrence. The Program Director (with the assistance of program staff, as needed) will work with the awarding agency (District Attorneys Council, Office on Violence Against Women, and Oklahoma CASA Association) to properly de-escalate, refer, and respond to the situation. As part of this reporting process, the Victim Services Programs Director will complete and submit the "Breach of Personally Identifiable Information (PII) Report" to the District Attorney's Council no later than 12 hours after an occurrence of an actual breach or detection of an imminent breach.

The Victim Services Director shall take responsibility for ongoing compliance, in consultation with executive leadership of LIFT Community Action Agency. The policy will be reviewed at least annually to ensure data protection standards are being met and the programs/policy complies with all applicable laws, along with any requirements set forth by funding agencies. The Victim Services Director will provide training as needed to all program employees to better understanding of their responsibilities when handling sensitive data and PII.

CLIENT GRIEVANCE POLICY AND PROCEDURES – VICTIM SERVICES PROGRAMS
LIFT COMMUNITY ACTION AGENCY, INC.

I. Purpose
LIFT Community Action Agency (LIFT CAA) is committed to providing high-quality, trauma-informed services to all clients and ensuring that each individual is treated with dignity, respect, and fairness. Clients have the right to express grievances without fear of reprisal or interference. The purpose of this policy is to establish clear procedures for filing, reviewing, and resolving client grievances in accordance with the *Oklahoma Administrative Code (OAC) 75:15-17-4*.

II. Policy
Clients of LIFT CAA's Victim Services Programs shall have access to a formal grievance procedure designed to ensure concerns or complaints are addressed promptly, fairly, and without retaliation. All clients shall receive written notice of this grievance and appeal procedure at intake, and documentation of such notice shall be maintained in the client's record.

III. Procedures
a. Written Notice of Rights
At intake, clients will receive a copy of this policy and an explanation of their right to file a grievance or appeal decisions made by staff. If involved, family members or significant others may also receive written notice of the grievance process. The notice will include:
- A description of the grievance and appeal process;
- The names and contact information of staff responsible for coordination and resolution;
- The client's right to file a complaint with the Oklahoma Office of the Attorney General, Victim Advocacy and Services Unit, including contact information.

b. Timeframes and Resolution Process
All grievances shall be handled as quickly and confidentially as possible to ensure timely resolution.
- ***Initial Resolution:***
  Grievances shall be submitted in writing to the Victim and Youth Services Director within 14 calendar days of the incident or concern. The Director will review and attempt to resolve the issue within 14 calendar days of receiving the grievance.
- ***Appeal Process:***
  If the client is unsatisfied with the resolution, they may submit a written appeal to the Executive Director within 7 calendar days of receiving the initial response. The Executive Director will provide a written response within 14 calendar days.
- ***If the Grievance Involves the Victim and Youth Services Director or Executive Director:***
  If the grievance involves the Victim and Youth Services Director, it shall be directed to the Executive Director. If the grievance involves the Executive Director, it shall be referred to the Chairman of the Board of Directors, who, with assistance from the Board Personnel Committee, will review and determine the final resolution.

c. Grievance Coordinators and Decision Makers
- ***Coordinator:*** Executive Director (Rebecca Reynolds Porter)

- ***Decision Makers:***
  - Victim and Youth Services Director (Dianna Atwood)
  - Executive Director (Rebecca Reynolds Porter)
  - Board Chairman (William Smith), for grievances involving the Executive Director

d. Right to File with the Oklahoma Attorney General's Office

Clients have the right to make a complaint directly to the Oklahoma Office of the Attorney General's Victim Advocacy and Services Unit at any time. The contact information is as follows:

Victim Advocacy and Services Unit
313 NE 21st Street
Oklahoma City, OK 73105
Phone: (405) 521-3921
Email: victimservices@oag.ok.gov

This contact information will be provided to clients at intake and upon request, and documentation will be included in the client's record.

e. Documentation

All grievances, communications, findings, and resolutions will be documented and maintained in a confidential grievance file separate from client case records. Documentation will include:

- Date of grievance submission;
- Description of the complaint;
- Steps taken and communications made;
- Final decision and resolution date; and
- Signatures of both staff and client (if available).

f. Monitoring and Continuous Improvement

The mechanism to monitor the grievance process and improve performance based on outcomes will consist of an internal feedback loop. The Victim and Youth Services Director, who will be responsible for documenting all program grievances and steps taken during the process, will regularly report to the Executive Director, supervising Associate Director (if applicable), and Human Resources Director regarding all grievances reported. The Director will detail the circumstances concerning the grievance, process, and outcome (including staff and client input), facilitating discussion over improvements that could be made to garner more positive outcomes or even avoid the situation in the first place. These reports will be used to inform the annual review of the grievance policy and procedures, including revisions as needed.

g. Non-Retaliation

No staff member, volunteer, or contractor shall retaliate against any client or family member for filing a grievance or appeal. Retaliation will result in disciplinary action, up to and including termination.

h. Client Acknowledgment

All clients will be asked to sign an acknowledgment confirming they received a copy of the Grievance Policy and Procedures.

Rules – Victim Services Programs
LIFT Community Action Agency, Inc.

The following are prohibited activities and will be considered a breach of the standards of conduct, leading to discharge from LIFT CAA's Victim Services Programs:

1. The use of alcohol, illegal drugs, or the abuse of non-prescription and/or prescription drugs by clients and staff on the premises of any agency facility or function;
2. Smoking and tobacco use of any kind on the premises of agency facilities (includes, but is not limited to, smokeless tobacco, chewing tobacco products, cigarettes, cigars, pipes, electronic cigarettes, personal vaporizers, and any other electronic nicotine delivery systems);
3. Physical violence and other abuse between staff and/or clients, including physical discipline/punishment of children. All real and suspected child abuse will be reported to the Department of Human Services' Child Welfare Unit or other appropriate authority;
4. Disorderly conduct or any act which may endanger the safety or well-being of others and/or the agency;
5. Threatening, intimidating, coercing, harassing (in any form), using abusive or vulgar language, or interfering with clients or the performance of employees;
6. Unauthorized possession of agency, employee or client property, gambling, carrying weapons or explosives, or violating criminal laws on agency premises;
7. Engaging in acts of dishonesty, fraud, theft or sabotage, including damaging or destroying agency property through careless or willful acts;
8. Violating confidentiality of clients, staff or volunteers;
9. Falsifying an application for services or any other agency documents or records;
10. Willfully destroying or deleting any files and agency records;
11. Willfully disregarding or violating any agency policy, procedure, or rule; and
12. Engaging in such other practices as may be determined to be inconsistent with the ordinary and reasonable rules of conduct necessary to the welfare of the agency, its employees or clients.

WE will HELP YOU find SAFETY.

Services are provided with fairness and respect for the victim's dignity and privacy.

Services provided to residents of Choctaw, Pushmataha and McCurtain counties

DeeDee Atwood
Victim Services Coordinator
Lift Community Action Agency,Inc.
Dianna.Atwood@liftca.org
580-298-2921
24 HOUR HELP CALL OR TEXT
580-317-3905
580-372-0806 or
580-372-0816

This institution is an equal opportunity provider and employer

LIFT VICTIM ADVOCACY SERVICES

CONTACT:
DeeDee Atwood
Lift CAA
603 S. W. B Street
Antlers, OK 74523
580-298-2921

Dianna.Atwood@liftca.org

24 HOUR HELP

CALL OR TEXT

580-317-3905

580-372-0806 or

580-372-0816

The Promise of Community Action

Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.

Lift Community Action Agency

"This project is supported by VOCA Grant # 2021-VO-CA-Little Dixie CAA-101 awarded by the US Department of Justice through the Oklahoma District Attorneys Council."

Know Your Rights & SEEK HELP

LIFT VICTIM ADVOCACY SERVICES

CONTACT:
DeeDee Atwood
Victim Services Coordinator

580-298-2921

24 HOUR HELP CALL OR TEXT

580-317-3905

580-372-0806 or 580-372-0816

Notice of Rights

WHO IS ELIGIBLE?

Victims of any crime which include but are not limited to:

- Child physical abuse and neglect
- Elder abuse/neglect
- Sexual abuse
- Domestic and or family violence
- Arson
- Bullying
- Stalking
- Burglary
- Homicide
- Identity theft
- Court order violation

Services provided: Emergency services to victims such as resources, food, clothing and shelter, community outreach, victim advocacy, safety plans, court system advocacy, accompaniment to hospitals for medical examinations.

1. The right to request that charges be pressed against your assailant.
2. The right to request protection from any harm or threat of harm arising out of cooperation with law enforcement and prosecution efforts and to be provided with information on the level of protection available.
3. The right to be informed of financial assistance and other social services available, including information on how to apply for the assistance and services.
4. The right to file a petition for a protective order or, when the court is not open for business, an emergency temporary protective order.

LIFT VICTIM ADVOCACY SERVICES

"This project is supported by VOCA Grant # 2021-VO-CA-Little Dixie CAA-101 awarded by the US Department of Justice through the Oklahoma District Attorneys Council."

Victim Services Coordinator duties:

- Respond to the emotional and physical needs of crime victims
- Assist primary and secondary victims of crime to stabilize their lives after victimization
- Assist victims to understand and participate in the criminal justice system
- Provide the victims of crime a measure of safety and security
- Assistance with Victim Compensation Claim Forms and Victim Restitution Recovery Forms.

Lift Community

Action Agency, Inc.

Safe Place Healing Hearts Program

Office Locations:

Pushmataha County

603 S.W. “B” Street

Antlers, Ok. 74523

580-298-2921

Choctaw County

500 E. Rosewood

Hugo, Ok. 74743

580-326-5201

McCurtain County

312 W. Texas St.

Idabel, Ok. 74745

580-286-9348

www.liftcaa.org

The Promise of Community Action

Community Action changes people's lives,
embodies the spirit of hope,
improves communities,
and makes America a better place to live.
We care about the entire community,
and we are dedicated to
helping people help themselves
and each other.

FREE. 24/7. CONFIDENTIAL
NATIONAL DOMESTIC VIOLENCE
HOTLINE
1(800) 799-7233

LOCAL VICTIM ADVOCACY SERVICES

24/7

CALL or TEXT

580-372-0806

or

580-372-0816

Serving Choctaw,

Pushmataha, and

McCurtain Counties

This project was supported by Grant # 2017-WR-AX-0046 awarded by the Office on Violence Against Women, U.S. Department of Justice. The opinions, findings, conclusions, and recommendations expressed in this publication/program/exhibition are those of the author(s) and do not necessarily reflect the views of the Department of Justice, Office on Violence Against Women.

This institution is an equal opportunity provider & employer

Safe Place
Healing Hearts Program

Meeting the needs of rural victims of sexual assault, domestic violence, dating violence, and stalking in Pushmataha, Choctaw, and McCurtain Counties

Lift
Community Action Agency

Domestic Violence.

It's never this obvious.

Get Help. Get Answers. Make the Call.

24/7 Call or Text

580-372-0806 or 580-372-0816

You didn't deserve it. It's *NEVER* the victim's fault. No excuse for sexual assault.

24/7 Call or Text

580-372-0806 or 580-372-0816

ASSISTANCE AVAILABLE:

Services provided: Emergency services to victims such as resources, food, clothing, shelter, community outreach, victim advocacy, safety plans, court system advocacy, accompaniment for medical examinations, and transportation

Victim Advocate duties:

Respond to the emotional and physical needs of crime victims

Assist primary and secondary victims of crime to stabilize their lives after victimization

Assist victims to understand and participate in the criminal justice system

Provide the victims of crime a measure of safety and security

Assistance with Victim Compensation Claim Forms and Victim Restitution Recovery Forms

STALKING IS ONE OF THE FEW CRIMES WHERE EARLY INTERVENTION CAN PREVENT VIOLENCE & DEATH

Not romantic.....Not a joke.....

It's a crime.

24/7 Call or Text

580-372-0806 or 580-372-0816

Don't be that ONE. Get Help.

24/7 Call or Text

580-372-0806 or 580-372-0816

MISSION STATEMENT – VICTIM SERVICES PROGRAMS
LIFT COMMUNITY ACTION AGENCY, INC.

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

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

PHILOSOPHY OF SERVICE PROVISION – VICTIM SERVICES PROGRAMS
LIFT COMMUNITY ACTION AGENCY, INC.

The philosophy for service provision for victims of domestic violence, sexual assault is that: All persons have the right to live without fear, abuse, coercion, oppression, violence, and child abuse. There should be equality in relationships and survivors of domestic violence, sexual assault and stalking should be helped to assume power over their own lives. No one deserves to be victimized by assaultive, coercive, or abusive behavior, and survivors should be treated with dignity and respect; all people involved in violent crimes are affected – victims, children, families, partners, friends, the community, and perpetrators. Offending is a choice, and perpetrators of domestic violence, sexual assault and stalking are solely responsible for their behavior, and they should be held accountable for their behavior. A coordinated community response is the best approach to eliminating domestic violence, sexual assault, sex trafficking, and stalking in Oklahoma, with safety for victims/survivors and their dependents the primary focus; intervention and services shall be based upon the safety and well-being of individuals and communities. Services shall be provided in a non-judgmental, voluntary, non-coercive manner and take place in a safe, trauma-informed environment. Services should encourage self-determination (based on needs, preferences and values), autonomy, physical and emotional safety, and provide information that will enable independence. Services shall respect the spectrum of differences that exists among groups of people with definable and unique cultural backgrounds. Services shall be delivered from an approach that recognizes the impact of trauma and acknowledges the role of trauma in the lives of victims/survivors and their dependents.

LIFT CASA Program Goals

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

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

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

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

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

Goal #6: To improve overall program capacity to appropriately respond to the needs of abused and neglected children within Choctaw, McCurtain, and Pushmataha Counties.

Victim Advocacy Services Program Goals

Goal #1: To enhance and more efficiently deliver appropriate services to crime victims and their families in Choctaw, McCurtain, and Pushmataha Counties, in order to meet their emotional/mental health and physical needs, as well as ensure victim safety and security.

Goal #2: To raise victim, Provider, and community awareness of crime victims' services, rights, and resources available in Choctaw, McCurtain, and Pushmataha Counties.

Goal #3: To enhance collaboration and accountability among victim service providers within Choctaw, McCurtain, and Pushmataha Counties.

Safe Place Healing Hearts Program Goals

The overall aim of the Safe Place Healing Hearts Program will be to enhance the safety of rural victims of sexual assault, domestic violence, dating violence, and stalking. To accomplish this, the project will work towards the goal of expanding and more efficiently delivering appropriate services to victims of sexual assault, domestic violence, dating violence, and stalking in Choctaw, McCurtain, and Pushmataha Counties, in order to meet their emotional and physical needs, as well as ensure victim safety and security. Secondly, the project will work towards the goal of enhancing collaboration between and building the capacity of service providers in the target rural communities to appropriately respond to, improve the rate of prosecution, coordinate service delivery, and assist victims in cases of domestic violence, dating violence, sexual assault, and stalking.

Safe Place Healing Hearts Too Program Goals

The overall aim of Safe Place Healing Hearts Too will be to support comprehensive, community-based efforts to address the needs of children impacted by domestic violence, dating violence, sexual assault, and stalking in southeast Oklahoma. To accomplish this, the project will work towards the goal of developing, expanding and strengthening prevention strategies, intervention services and treatment targeting children ages 0-10 years who are victims of and/or exposed to domestic violence, dating violence, sexual assault, and stalking in Choctaw, McCurtain, and Pushmataha Counties. The project will work towards another goal of supporting a coordinated community response, by enhancing collaboration between and building the capacity of service providers in the target counties to appropriately respond to and assist child victims or those exposed to domestic violence, dating violence, sexual assault, and stalking.

LIFT Community Action Agency Victim Services Programs
Code of Professional Ethics

Purpose

The purpose of this Code of Professional Ethics is to establish clear behavioral expectations and guiding principles for all staff, volunteers, and representatives of LIFT Community Action Agency (LIFT CAA) Victim Services Programs. This Code reflects the ethical foundation of our work—centered on empowerment, integrity, respect, and the safety and autonomy of survivors of domestic violence, sexual assault, and stalking.

All employees and volunteers are expected to uphold these ethical standards in every aspect of their professional conduct to ensure the highest quality of trauma-informed, survivor-centered services.

I. Confidentiality and Privacy

- All staff and volunteers shall maintain the confidentiality of client information in accordance with federal and state laws, including 74 O.S. §18p-3 and VAWA §12291(b)(2).
- No personally identifying information may be shared without the informed, written consent of the client, except where disclosure is mandated by law (e.g., imminent risk of harm, mandated reporting of child abuse).
- Confidential discussions shall occur only in private spaces, and client records shall be securely maintained in locked or password-protected systems.
- Employees are responsible for safeguarding both physical and digital client information from unauthorized access, disclosure, or misuse.

II. Guiding Values

- **Empowerment and Autonomy:** Staff and volunteers shall honor the right of each client to make their own choices and support them in regaining control over their lives.
- **Self-Determination:** Staff and volunteers shall respect each client's inherent right to make their own decisions, recognizing that survivors are the experts in their own lives. Employees will support client choice without coercion, provide accurate information to

promote informed decision-making, and honor the client's pace in the healing and recovery process.

- **Integrity and Compassion:** All interactions with clients and colleagues shall reflect honesty, empathy, and professionalism.
- **Empathy:** Advocates shall strive to understand and validate each client's experience with compassion and non-judgment. Advocates will actively listen, demonstrate genuine care, and communicate understanding in ways that promote safety, trust, and emotional connection without crossing professional boundaries.
- **Non-Judgment and Respect:** Staff and volunteers shall treat all individuals with dignity, respect, and without discrimination.
- **Client-Centered Practice:** Services shall be guided by the client's self-identified needs, goals, and cultural values.

III. Professional Competence

- Employees and volunteers shall maintain professional competence through ongoing education, skill-building, supervision, and training in trauma-informed, evidence-based, and culturally responsive practices.
- Staff shall perform within the scope of their education, training, experience, and job responsibilities.
- Employees have a duty to report unethical or unprofessional conduct by colleagues to their immediate supervisor or the Program Director.
- Advocates shall receive appropriate orientation and supervision to ensure they perform assigned duties competently and ethically.

IV. Professional–Client Relationships

- Advocates shall maintain clear, professional boundaries with clients at all times.
- Personal, romantic, or financial relationships with current clients are strictly prohibited.
- Staff shall avoid any real or perceived conflicts of interest that could compromise client trust or program integrity.

- All interactions shall be conducted in a manner that supports client empowerment and does not exploit or manipulate the client relationship.

V. Social Responsibility

- Advocates shall contribute to a fair, inclusive, safe, and trauma-responsive environment that promotes safety and healing for all individuals.
- Employees shall not engage in any form of harassment, discrimination, or violence within the workplace.
- All team members shall strive to improve community awareness of domestic violence, sexual assault, and stalking through prevention, advocacy, and collaboration.
- Advocates shall model non-violent, respectful communication and uphold the principles of trauma responsiveness in all professional interactions.

VI. Accountability and Enforcement

- Adherence to this Code of Professional Ethics is a condition of employment and volunteer service.
- Violations of the Code may result in disciplinary action, up to and including termination.
- The Program Director and Executive Director are responsible for ensuring that all Advocates review, understand, and adhere to this Code annually.

2025 BOARD TRAINING PLAN

Community Action Agency: LIFT Community Action Agency, Inc.

Plan developed by: Rebecca Porter, Executive Director

Recommended Training Categories & Topics *Select the topics you plan to include in your agency's annual Board Training Plan.*			Planned Date for Training
ROMA	☑	Results Oriented Management and Accountability (ROMA Video or other ODOC required training material)	**9/9/2025**
ROMA	☑	ROMA Application: Performance based management concepts embodied in ROMA as the framework for all aspects of agency operations including program planning, resource allocation, service provision, program evaluation and theory of change	**2/11/2025** (Annual Report to ODOC)
ROMA	☑	Community Needs Assessment: * assessing, and respond to the causes and conditions of poverty in the community * board's specific role in prioritizing the results and deciding which needs the agency should address (in alignment with mission)	**1/14/2025** Community Needs Assessment Approval/Report (2025-27) ------------------------------- *6/11/2024 C.N.A. Review/ Survey Collection (25-27)* *10/8/2024 C.N.A. Update/ Prioritization of Needs* *12/2024 Community Mtgs.*
ROMA	☑	Planning: Developing the Community Action Plan (annual plan) and Strategic Plan (long-range plan). Evaluate last year's performance to determine what needs to be done differently this year	**2/11/2025** **12/9/2025**
ROMA	☑	Program Implementation – oversight of agency programs and activities throughout the year, receive and analyze periodic reports from agency staff with focus on progress toward achieving milestones	**All Board Meetings** (held 2nd Tuesday of each month)
ROMA	☑	Analyzing Data & Assessing Results among programs, clients and communities being served	**2/11/2025** (Annual Report to ODOC)
ROMA	☑	Agency Program evaluation: How to determine the relative "success" of the agency by comparing outcomes with performance expectations which were developed during the agency's planning cycle. How to use the agency's Community Needs Assessment, Community Action Plan and Strategic Plan throughout the ROMA cycle for continuous program evaluation and improvement.	**2/11/2025** (review of documents submitted with CSBG application & expected outcomes) **12/9/2025** (review of Projected to Actual Outcomes)
Financial Oversight	☑	Agency-wide Budget	**12/9/2025**
Financial Oversight	☑	CSBG Organizational Standards Fiscal Management	**9/9/2025**
Financial Oversight	☑	Financial Oversight: overall agency fiscal status, procedures, practices, and transactions	**9/9/2025**
Financial Oversight	☑	How to interpret an audit report	**8/12/2025** (conducted by Auditor)

Recommended Training Categories & Topics *Select the topics you plan to include in your agency's annual Board Training Plan.*			**Planned Date for Training**
	☑	How to interpret financial statements	**9/9/2025**
General	☑	Board of Directors' Roles and Responsibilities	**1/14/2025**
	☑	Board recruitment and retention	**4/8/2025**
	☑	Low income participation in board activities and members (Org, Standard 1.1)	**4/8/2025**
	☑	Evaluation of the Executive Director	**10/14/2025**
	☑	The Role of Board Minutes	**8/12/2025**
	☑	How boards can evaluate their own board's performance	**4/8/2025** (Risk & Self-Assessments)
Requirements	☑	History and future of Community Action and anti-poverty work	**5/13/2025**
	☑	Statutory and regulatory requirements (CSBG Act, other Federal, State or local statutes)	**5/13/2025**
	☑	CSBG IM82 Tripartite Boards	**1/14/2025**
	☑	CSBG Organizational Standards	**7/8/2025**
	☑	Board Roles & Responsibilities	**1/14/2025**
	☑	ODOC's CAA Implementation Manual, Requirement 113	**5/13/2025**
	☑	Open Meeting Act training	**8/12/2025**
Other	☑	*LIFT CAA History, Mission, Vision and Values Statement*	**5/13/2025**
	☑	*Eligibility, Recruitment, Selection, Enrollment and Attendance (ERSEA) Policies and Procedures (Head Start/Early Head Start/EHS-Child Care)*	**2/11/2025 & 7/8/2025**
	☑	*Affirmative Action Plan*	**No longer required per Amendment to the CSBG Implementation Manual and CSBG Monitoring Tool, to reflect compliance with Executive Order 14173**
	☑	*Victims Services Programs*	**1/14/2025 & 12/9/2025**
	☐		**Note: highlighted box or text denotes training has been completed on date listed.*

Attach additional pages if needed

Resources:

ODOC's CAA Implementation Manual
https://okcommerce.gov/assets/files/grants/CAA_Contractor_Implementation_Manual.pdf

Office of Community Services' IM 82
https://www.acf.hhs.gov/ocs/resource/im-no-82-tripartite-boards

Community Action Agency Board Members TOOLKIT:
http://www.cencomfut.com/toolkit.htm

CAPLAW Bylaws Toolkit, *Updated 2009*

2025 ROMA Plan

Enter Agency LIFT Community Action Agency, Inc. ***Date:*** ***1/16/2025***

ROMA Cycle	ROMA Action Item	Participant Manual Module	2025 Target Completion Date	Person(s) Responsible
Assessment	Review/revise current **MISSION** statement	2, Part 1	NA	Board, ED, AD's; Prog Dir; Staff; ROMA Coord
	Review last community **NEEDS** assessment to determine priority needs, Ensure that needs identified are properly labeled as family, agency, and community levels	2, Part 2	1/14/2025	ED; Staff; PD's; Board; ROMA Coord; Community Members; Focus Groups
	Evaluate the available resources in your community to address any service gaps or find collaborators	2, Part 2	01/01/2025-Ongoing	ED; Staff; PD's; Board; ROMA Coord; Community Members; Focus Groups
	Evaluate current program services and determine effectiveness to meet needs (based on recent program performance).	2, Part 2	01/14/2025-Ongoing	ED; Staff; PD's; Board; ROMA Coord; Community Members; Focus Groups
Planning	For the top 3-5 needs identified in your most recent CNA, develop a logic model. Fill in as you complete the ROMA action items. Once your planning logic models are completed, submit with your Community Action Plan.	7	2/11/2025	Planning Director; ROMA Coordinator
	Based on needs and program evaluation, identified during the assessment process, plan your measurable **OUTCOMES** to be achieved to meet the needs that are linked to the 6 NPI's.	3, Part 1	02/11/2025 Planning logic models/CAP Plan; 12/09/2025 Report to Board PMO	Planning Director; ROMA Coordinator
	Identify **SERVICES** and strategies to achieve outcome(s).	3, Part 2	01/01/2025-Ongoing	ED; Staff; PD's; Board; ROMA Coord; Community Members
	Determine **OUTCOME INDICATORS**	4	2/11/2025	Leadership; Program Staff; Planning Dept.
	Determine your projected success rates for each outcome indicator.	5	2/11/2025	Program Directors; Leadership; Staff
	Develop a system to track services and outcomes. Determine what documentation will be collected to measure each outcome, staff responsible and how often data will be collected. (**MEASUREMENT, DATA, and FREQUENCY**)	5	01/01/2025-12/31/2025	ROMA Coordinator
	Update Community Action Plan to include outcomes, strategies and specific data collection information.	3, Part 1	2/11/2025	Planning Director; ROMA Coordinator
Implementation	Implement revised Community Action Plan	4	01/01/2025-12/31/2025	Leadership; Staff; Board; Partners
	Determine frequency to monitor implementation of plan.	4	01/01/2025-12/31/2025	Program Directors; Leadership; Staff; Planning Dept;
	Determine the frequency for evaluating progress and report results to board.	4	02/2025/07-2025/10-2025/12-2025	Program Directors; Leadership; Staff; Planning Dept;
Achievement of Results	Measure your actual **RESULTS** for each outcome	5	12/9/2025	Program Directors; Leadership; Staff; Planning Dept;
	Update your planning logic models with the actual results, then resubmit to ODOC.	7	12/9/2025	Planning Director; ROMA Coordinator
	Analyze data; compare with performance targets/projected success rates determined during the planning phase.	5	12/9/2025	Planning Director; ROMA Coordinator
	Adjust performance goals as needed as evidenced by actual performance. Continue strategies that achieve desired performance goals. Revise or discontinue strategies that do not achieve desired performance.	5	01/01/2025-12/31/2025	Program Staff; ROMA Coordinator with input from leadership
	Update Community Action Plan.	4	2/11/2025	Planning Director; Leadership; Staff; PD's Board

Evaluation	Submit CSBG IS report.		2/11/2025	CSBG Administrator/ROMA Coordinator
	Reevaluate the community needs assessment process make changes (if needed) to ensure that later assessments follow the ROMA framework and guidelines	2, Part 2	NA	Planning Dept; Leadership; Board; Community Members; Staff; Partners
	Review the demographics of the population served. Identify if they have received single services, multiple services, or bundled services. Consider the connections among people, services, and outcomes.		02/11/2025-Ongoing for 2026 report	CSBG/Admin; CAPTAIN Data Entry Staff; Program Staff

ODOC Form Revision Date - 11/04/2019

Remember that the ROMA cycle is a on-going cyclical process.

This form is to help you ensure ROMA Implementation within your agency.

As changes are made to the target dates, an updated ROMA PLan should be submitted to your liasion.

ROMA Cycle was created by the National Peer-to-Peer ROMA Training and Certification Project

FY 2025 Community Needs Assessment Summary
LIFT Community Action Agency, Inc.

1. What date was the assessment conducted? The Community Needs Assessment began in March 2024. The community "piece" of the assessment (data collection, meetings, etc.) was completed in December 2024; data collection from Census and other sources was completed in January 2024. The report was approved at the January 14, 2025 Board of Directors meeting.

2. How were surveys conducted (phone, mail, personal contact, etc.)? Surveys were conducted using paper printouts from the survey in CapSystems. These surveys were distributed several ways. They were emailed to all staff and Board of Directors. Paper copies of the surveys were sent home with all Head Start, Early Head Start, and Early Head Start-Child Care students as well as to front-line staff who were asked to hand them out to clients.

Board Members, front-line staff, leadership, program directors and supervisors received an additional survey during the month of October 2024. This survey required respondents to rank the top three needs from a list of the top 10 needs pulled from the results of the Community Needs Assessment survey results. All respondents were also asked to provide rationale or qualitative data for each of their selections.

3. Were low-income individuals surveyed? (Organizational Standard 1.2) Specifically, low-income individuals with children enrolled in the agency's Head Start and Early Head Start programs were surveyed. This survey was advertised and available to all residents living within Choctaw, McCurtain, and Pushmataha Counties, each of which has significant percentages of low-income residents as evidenced by the high poverty rates. All community sectors, as required by the CSBG guidelines, were surveyed. A total of 337 completed surveys were inputted into the CapSystems online survey tool. One survey question (Question 14 from the Oklahoma Needs Assessment Standardized survey) asked respondents to select from ten possible choices the sector which best represented them. From the 337 responses, 67 or 19% selected low-income. As another choice was "Client of Agency", it is safe to assume that the actual number of respondents with low-incomes was much higher.

4. Were all five key sectors (community-based organizations, faith-based organizations, private sector, public sector and educational institutions) surveyed? If no, explain (Organizational Standard 2.2). Yes. The survey representation by each key sector was as follows: Community-based-3.86%; Faith-based-2.97%; Private sector-0.89%; Public sector-1.48% and Educational institutions-3.56%.

5. Were others surveyed? Yes; all residents were encouraged to complete the survey and attend the Public Meetings. Those addressed in previous paragraphs represent the population surveyed which is representative of the service area and resident demographics. In addition to the five key sectors, other sectors included: Client of Agency-18.99%; Agency Board Member-2.97%;

Agency Volunteer-0.89%; and General Public (having never received services from the agency)-64.39%. A total of 337 surveys were completed and entered into an online database.

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

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

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

Prioritized Need 1 – Housing

Decent, safe, and affordable housing units (rental and purchase) are a family/community level need. Housing is a critical community need because it provides stability and security for low-income families, reducing the risk of homelessness and improving overall quality of life. Access to affordable housing is directly linked to poverty alleviation, as it allows families to allocate more resources towards education, healthcare, and other essential needs, breaking the cycle of poverty. LIFT CAA is currently addressing this need through the provision of rental units, which includes rental units for seniors. The agency also provides numerous other housing and housing supportive services for service area residents. This prioritized need will be met by the agency.

> ***Level:*** Family/Community
> ***Service/Activity:*** LIFT CAA will build 5 new homes through the Housing Stability Program.
> ***FY 2025 Outcome:*** Increased safe, decent and affordable housing geared towards low-income families.
> ***FY 2025 Outcome Indicator:*** By 12/31/2025, 2 out of the 5 homes or (40%) will be completed and ready to sell.
> ***FY 2025 Strategies:***
> - Ensure construction stays on schedule and within budget through effective project management.

- Incorporate sustainable and energy-efficient features when possible to create healthy living environments and help lower utility costs for future homeowners.
- Develop marketing aimed at low-income families to ensure they are aware of the new homes being constructed.
- Provide homebuyer support and education to help low-income families become mortgage-ready.
- Conduct regular reviews to monitor progress and address any issues promptly.

Prioritized Need 2 – Transportation

Reliable and accessible transportation is a community/agency level need. The lack of accessible and reliable transportation limits opportunities for employment, education, healthcare, and other essential services, disproportionately affecting low-income residents and vulnerable populations. To address this, the agency provides local demand services through the LIFT Transit Program as well as non-emergency medical trips and transportation for other needs for older adults through SoonerRide and KEDDO (Kiamichi Economic Development District of Oklahoma) funding. Expanding transportation services could alleviate these burdens and improve overall access and mobility in the area. This prioritized need will be met by the agency.

Level: Community/Agency
Service/Activity: Increase after-hours transit services by providing an additional 24 hours of service per month (after 4 p.m. and on weekends) through the PICK mobile application.
FY 2025 Outcome: Enhanced accessibility and mobility for low-income community members, leading to improved access to employment, education, healthcare, and social activities.
FY 2025 Outcome Indicator: By 12/31/2025, the number of after-hours transit services provided will increase to 144.
FY 2025 Strategies:

- Hold meetings to discuss implementation planning and finalize agreement.
- Coordinate/hold staff training sessions on utilization of VIA software for ride scheduling and operability.
- Conduct public relations campaign to inform the community about the new after-hours transit services to be provided.
- Launch after-hours LIFT Transit services.
- Regularly monitor after-hours services operations, logistics, and performance, making adjustments as needed.

Prioritized Need 3 – Youth Services

Safe and reliable Youth Services programs/activities is a community level need. Youth services programming, such as mentoring, are essential for fostering positive development and providing guidance to at-risk youth, helping them build essential life skills and resilience. These programs are crucial in breaking the cycle of poverty by offering support and opportunities that empower young people to achieve academic and personal success, ultimately leading to better economic prospects. To address this need, LIFT CAA offers mentoring and supportive services through various programs. This prioritized need will be met by the agency, in collaboration with community partners.

Level: Community
Service/Activity: Develop/implement youth programming that provides a safe environment for children and teenagers, offering educational and social supports, recreational activities, and mentorship opportunities.
FY 2025 Outcome: Youth programming participants will experience enhanced social skills and increased engagement in safe and positive recreational activities, contributing to their overall well-being and development.
FY 2025 Outcome Indicator: By 12/31/2025, the implemented youth programs will provide services to 50 youth.
FY 2025 Strategies:

- Develop and implement services (through LIFT CAA or partner collaborations) that include activities such as educational supports, social skills development, recreational activities, and mentorship opportunities.
- Plan a variety of activities that cater to different interests and age groups.
- Collaborate with local schools and youth-serving groups to identify youth who would benefit from the programming.
- Partner with community organizations on the provision of services, as well as resources, volunteers, and other supports.
- Recruit volunteers to provide youth mentorship and support.
- Provide ongoing training for staff and volunteers to ensure they are equipped with the skills and knowledge to effectively support program participants.
- Conduct outreach to raise awareness of/promote youth programming provided and encourage participation.
- Involve families in the program through regular communication and events to support the overall development of the youth served.

Agency Need – Capacity Building

Capacity building to support expansion and infrastructure development is an agency level need. LIFT CAA requires additional office facilities to accommodate the growing number of program staff needed to support expanding services. As the agency introduces new programs to better serve the community, it is essential to provide adequate workspace for staff to operate efficiently and effectively. Increasing office facilities will enhance the agency's capacity to deliver high-quality services, foster collaboration and accessibility, and ensure a supportive environment for both staff and clients. This expansion is crucial for meeting the evolving needs of the communities served and achieving LIFT CAA's mission. This need will be met by the agency.

Level: Agency

Service/Activity: LIFT CAA will identify and obtain two additional office buildings to house new program staff.
FY 2025 Outcome: Increased access to services due to additional facilities obtained.
FY 2025 Outcome Indicator: By 12/31/2025, at least one facility will be obtained (through rental or purchase) to house agency staff.
FY 2025 Strategies:

- Evaluate the current and projected space requirements for new program staff to determine the size and type of facilities needed.
- Research local real estate market to identify potential office buildings for rent or purchase that meet the agency's requirements.
- Conduct site visits to evaluate the suitability of identified properties, considering factors such as location, accessibility, and amenities.
- Identify and secure funding sources to support the acquisition of additional office building.
- Verify that the new office building meets all safety and accessibility standards to provide a suitable environment for staff and clients.
- Obtain facility and provide public relations outreach to inform the communities.

The top three needs prioritized from the community needs assessment conducted in 2024 and subsequently approved by the Board of Directors at the January 14, 2025 Board Meeting were: Housing, Transportation, and Youth Services. The new needs assessment reflected a change from the prior C.N.A. This is attributed to the community seeing a boost in Economic Development and Substance Abuse Services.

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

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

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

As noted in the Logic Models for 2025, the prioritized needs which will be the focus for identifying and implementing strategies are: Housing, Transportation, and Youth Services.

2025 Community Action Plan (January thru December 2025)
LIFT (Lifting Individuals For Tomorrow) Community Action Agency, Inc.

Purpose:

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

Executive Summary: The purpose of this plan is to serve as a guide over the next 12 months for ensuring that the work of LIFT Community Action Agency, Inc. (LCAA) aligns with the CSBG Act as well as the communities needs as identified in the most recent 2025-2027 Community Needs Assessment and the 2023-2025 Strategic Plan.

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

The goal will be to focus resources towards achievement of outcomes identified in the C.N.A. report, Strategic Plan, Performance Management Outcomes excel workbooks and the FY25 logic models (all included as uploads). The logic models are representative of the communities' top three prioritized needs-Housing, Transportation and Youth Services. Additionally, the CAP and Logic Models address the Agency need to increase organizational capacity.

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

LIFT (Lifting Individuals for Tomorrow) Community Action Agency, Inc. was founded in 1968 when three local Community Action Agencies merged in order to better meet the needs of families with low incomes who resided in any one of the three very rural and poverty-stricken Southeast Oklahoma Counties. LCAA's primary service area includes Choctaw, McCurtain and Pushmataha Counties, a land area of over 4000 square miles with a population of 55,836 (July 1, 2023 U.S. Census Quickfacts estimates) which has remained stable since the 2020 Census (55,830). Nearly one in four individuals in the service area are living below the Federal Poverty Limits. This same source (U.S. Census July 1, 2023 Quickfacts) reflects that 12,596 individuals or 22.47% of the population lives below federal poverty income guidelines. This represents an increase from 2021 estimates which reflected 19.43% living below poverty. This shows that the increase in population is also representative of increased poverty. The agency, headquartered in Hugo, Oklahoma (Choctaw County) provides a wide array of services ranging from education, housing, social services, and emergency services to transportation and more all aimed at alleviating the conditions of poverty. LCAA is one of the top ten employers in the tri- county area with 243 full time staff and 27 part time staff as of December 31, 2023. The agency's annual budget is approximately $29 million (FY25 Board approved agency budget) and supports about 20 separate programs. In August of 2021, the Board formally approved the long-awaited name change from Little Dixie CAA to LIFT Community Action Agency, Inc. The new name better reflects the growth and direction of the agency.

The CAP represents, in large part, an extrapolation of data from recent and relevant agency and community-developed documents which includes the 2023-2025 Strategic Plan; 2025-2027 Community Needs Assessment Report; 2024 Customer Satisfaction Data; and analyzed data from CAPTAIN and other program-tracking databases. The data contained within these documents represent actual client counts and demographics, survey responses, and summaries from community and focus group discussions, etc.

Therefore, the CAP includes both quantitative and qualitative data. Some sections of the Community Needs Assessment report (approved by the Board of Directors on January 14, 2025) include qualitative data derived from interviews with Board members, service providers, residents, and staff. As part of the Strategic Planning process, the Community Needs Assessment Report was a resource that was used at length.

Stakeholders involved in the process of developing these documents included residents, staff, Board, other service providers, partners, and funders. The "key findings" that came out of these activities can be found throughout this 2025 Community Action Plan.
LCAA's 2025 CAP will be presented to the Board as a training and will be open for discussion during the regularly scheduled board meeting to be held March 11,2025.

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

LCAA's mission statement "*To improve the lives of low-income individuals and families through service and collaboration leading to self-sufficiency*" is the driver for all decisions and subsequent actions by representatives of the agency. The mission statement was approved by the Board in February of 2016 initially. It is reviewed as required by the Organizational Standards and was last revisited during the May 14, 2024 Board of Director's meeting. The Board members each reviewed the Mission Statement and concluded it met with the criteria as set forth in the CSBG regulations/guidance. The bulk of programs/services provided by the agency are targeted to families of low-income.
Most services require individuals/families meet low-income guidelines as an eligibility requirement. LCAA is first and foremost, a Community Action Agency. Therefore, the very identity of the agency is founded in addressing causes and conditions of poverty.

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

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

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

Assessment (demographic updates through December 2024 are inserted)
The community assessed represents LCAA's service area which includes Choctaw, McCurtain and Pushmataha counties. Collectively, these three rural Southeast Oklahoma counties have an average poverty rate of 22.47 percent (U.S. Census Bureau; July 2023 Poverty estimates). The population density is about 14.23 persons per square mile compared to the State's density of 57.7 persons per square mile. At the time of the assessment, about 65 percent of the population was white; 6.53 percent black; 8.20 percent two or more races and; 13.9% Native American with the remaining representing other races. Gender makeup is 51.07% female and 48.93% male. According to the U.S. Census ACS 2023 estimates, the combined population was 55,836. Compared to the 2019 5 year estimates, this represents a decline of 3,115 persons. The area has witnessed continuous population decline over the past three (30 years) census periods. This area

as described represents LCAA's service area which represents the community assessed for the most current Community Needs Assessment for January 1, 2025 through December 31, 2027.

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

The survey contained a question for respondents to self-identify which sector best described them. The available options included: Client of the Agency, Agency Board Member, Agency Volunteer, Representative of an Educational Institution, Representative of a Government Entity; Representative of a Private Organization; Representative of a Faith-Based Organization; Representative of a Community Based Organization; or General Public (someone having not received services from the agency). Surveys were completed and received from all sectors listed. A total of 337surveys were collected and entered into the survey feature within CapSystems. This database then generated the top needs ranked in ascending order for the top 10 identified needs. The top ten needs were shared with focus groups which included; leadership, front-line staff and board members to prioritize the needs to the top three. During the prioritization activity, focus group participants were asked to provide "rationale" or qualitative data as to why they selected and ranked/prioritized the three needs chosen. Counts were conducted on each respondents completed surveys and the need referenced most was identified as the number one prioritized need and this process was used to identify the top three.

Once needs had been prioritized, LIFT Community Action Agency conducted three community meetings (one per county in each county within the service area) in order to gain additional input from residents, local services providers, staff, board, and other stakeholders on the prioritized needs and resources within the service area. These meetings were also advertised via email, newspaper advertisements, posters, and through social media outlets. Meeting participants engaged in activities of identifying causes/conditions of poverty, existing resources, gaps in resources, and potential strategies for addressing each of the three needs. All of this data was collected and utilized to develop the 2025-2027 (January 1, 2025 through December 31, 2027) Community Needs Assessment Report, which represents one of the documents used to develop this FY25 Community Action Plan. It should be noted that an environmental scan was completed during the last quarter of 2022 for help with developing the new three year strategic plan.

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

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

A feature within the CAPTAIN software, the Service Integration Matrix (SIM) will assess if the client is eligible for other services than those originally sought. The SIM is ran internally (CAPTAIN Administrator and CAPTAIN Data Entry Staff) on every client served and follow up is conducted with clients if/when the SIM identifies client eligibility
or potential eligibility for other services. Currently, LIFT C.A.A. utilizes the Service Integration Matrix (SIM) to assist with case management. The SIM allows CAPTAIN users the ability to provide the client with additional services the client may be eligible for, based on the information reported. CAPTAIN data input staff email a computer- generated referral letter to the client. If the client is readily available, the letter can be given to them in person. This letter lists the possible services the client is eligible for and the contact information for those programs. By utilizing the SIM feature, LCAA program staff have the opportunity to educate and provide individuals/families with as many services as possible, thus improving customers chances of achieving self-sufficiency.

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

- Safe, decent and affordable housing units are a need identified need determined by the community needs survey. This is a family level need.
- Early Childhood Education to continue provision of preschool services is an identified need determined by the community needs survey. This is a community level need.
- Youth Services to bring more youth activities to our areas. This is a community level need.
- Emergency services to help families pay for utilities (heating/cooling costs) are an identified need determined by the community needs survey. This is a family level need.

- Transportation is an identified need determined by the community needs survey. This is a community level need.

<u>Prioritized Need 1 – Housing</u>

Decent, safe, and affordable housing units (rental and purchase) are a family/community level need. Housing is a critical community need because it provides stability and security for low-income families, reducing the risk of homelessness and improving overall quality of life. Access to affordable housing is directly linked to poverty alleviation, as it allows families to allocate more resources towards education, healthcare, and other essential needs, breaking the cycle of poverty. LIFT CAA is currently addressing this need through the provision of rental units, which includes rental units for seniors. The agency also provides numerous other housing and housing supportive services for service area residents. This prioritized need will be met by the agency.

Level: Family/Community

Service/Activity: LIFT CAA will build 5 new homes through the Housing Stability Program.

FY 2025 Outcome: Increased safe, decent and affordable housing geared towards low-income families.

FY 2025 Outcome Indicator: By 12/31/2025, 2 out of the 5 homes or (40%) will be completed and ready to sell.

FY 2025 Strategies:

- Ensure construction stays on schedule and within budget through effective project management.
- Incorporate sustainable and energy-efficient features when possible to create healthy living environments and help lower utility costs for future homeowners.
- Develop marketing aimed at low-income families to ensure they are aware of the new homes being constructed.
- Provide homebuyer support and education to help low-income families become mortgage-ready.
- Conduct regular reviews to monitor progress and address any issues promptly.

<u>Prioritized Need 2 – Transportation</u>

Reliable and accessible transportation is a community/agency level need. The lack of accessible and reliable transportation limits opportunities for employment, education, healthcare, and other essential services, disproportionately affecting low-income residents and vulnerable populations. To address this, the agency provides local demand services through the LIFT Transit Program as well as non-emergency medical trips and transportation for other needs for older adults through SoonerRide and KEDDO (Kiamichi Economic Development District of Oklahoma) funding. Expanding transportation services could alleviate these burdens and improve overall access and mobility in the area. This prioritized need will be met by the agency.

Level: Community/Agency

Service/Activity: Increase after-hours transit services by providing an additional 24 hours of service per month (after 4 p.m. and on weekends) through the PICK mobile application.

FY 2025 Outcome: Enhanced accessibility and mobility for low-income community members, leading to improved access to employment, education, healthcare, and social activities.

FY 2025 Outcome Indicator: By 12/31/2025, the number of after-hours transit services provided will increase to 144.

FY 2025 Strategies:

- Hold meetings to discuss implementation planning and finalize agreement.
- Coordinate/hold staff training sessions on utilization of VIA software for ride scheduling and operability.
- Conduct public relations campaign to inform the community about the new after-hours transit services to be provided.
- Launch after-hours LIFT Transit services.
- Regularly monitor after-hours services operations, logistics, and performance, making adjustments as needed.

<u>Prioritized Need 3 – Youth Services</u>

Safe and reliable Youth Services programs/activities is a community level need. Youth services programming, such as mentoring, are essential for fostering positive development and providing guidance to at-risk youth, helping them build essential life skills and resilience. These programs are crucial in breaking the cycle of poverty by offering support and opportunities that empower young people to achieve academic and personal success, ultimately leading to better economic prospects. To address this need, LIFT CAA offers mentoring and supportive services through various programs. This prioritized need will be met by the agency, in collaboration with community partners.

Level: Community

Service/Activity: Develop/implement youth programming that provides a safe environment for children and teenagers, offering educational and social supports, recreational activities, and mentorship opportunities.

FY 2025 Outcome: Youth programming participants will experience enhanced social skills and increased engagement in safe and positive recreational activities, contributing to their overall well-being and development.

FY 2025 Outcome Indicator: By 12/31/2025, the implemented youth programs will provide services to 50 youth.

FY 2025 Strategies:

- Develop and implement services (through LIFT CAA or partner collaborations) that include activities such as educational supports, social skills development, recreational activities, and mentorship opportunities.
- Plan a variety of activities that cater to different interests and age groups.
- Collaborate with local schools and youth-serving groups to identify youth who would benefit from the programming.
- Partner with community organizations on the provision of services, as well as resources, volunteers, and other supports.
- Recruit volunteers to provide youth mentorship and support.

- Provide ongoing training for staff and volunteers to ensure they are equipped with the skills and knowledge to effectively support program participants.
- Conduct outreach to raise awareness of/promote youth programming provided and encourage participation.
- Involve families in the program through regular communication and events to support the overall development of the youth served.

<u>Agency Need – Capacity Building</u>

Capacity building to support expansion and infrastructure development is an agency level need. LIFT CAA requires additional office facilities to accommodate the growing number of program staff needed to support expanding services. As the agency introduces new programs to better serve the community, it is essential to provide adequate workspace for staff to operate efficiently and effectively. Increasing office facilities will enhance the agency's capacity to deliver high-quality services, foster collaboration and accessibility, and ensure a supportive environment for both staff and clients. This expansion is crucial for meeting the evolving needs of the communities served and achieving LIFT CAA's mission. This need will be met by the agency.

Level: Agency
Service/Activity: LIFT CAA will identify and obtain two additional office buildings to house new program staff.
FY 2025 Outcome: Increased access to services due to additional facilities obtained.
FY 2025 Outcome Indicator: By 12/31/2025, at least one facility will be obtained (through rental or purchase) to house agency staff.
FY 2025 Strategies:

- Evaluate the current and projected space requirements for new program staff to determine the size and type of facilities needed.
- Research local real estate market to identify potential office buildings for rent or purchase that meet the agency's requirements.
- Conduct site visits to evaluate the suitability of identified properties, considering factors such as location, accessibility, and amenities.
- Identify and secure funding sources to support the acquisition of additional office building.
- Verify that the new office building meets all safety and accessibility standards to provide a suitable environment for staff and clients.
- Obtain facility and provide public relations outreach to inform the communities.

The top three needs prioritized from the community needs assessment conducted late in 2024 and subsequently approved by the Board at the January 14,2025 board meeting were Housing, Transportation and Youth Services. The new needs assessment reflected two changes from the prior C.N.A. The two previous Community Needs Assessments identified Substance abuse/use services and economic development along with Housing as the top three needs.

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

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

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

As noted in the logic models for 2025, the prioritized needs which will be the focus for identifying and implementing strategies are: Housing, Transportation and Youth Services as well as Agency Capacity Building.

Planning

In August 2024, LCAA began the process to create the new three-year (2023-2025) Strategic Plan. This process began with internal reviews and analysis of the existing 2020-2023 Strategic Plan, the current Community Needs Assessment, the 2021 and 2022 logic models, the performance measurement outcomes spreadsheet, and the Customer Satisfaction survey results from calendar year 2021. In addition, discussion and analysis occurred over program services provided as reported in CAPTAIN.

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

On November 12th, 2024, the Board of Directors reviewed the 2024 Community Action Plan and the 2024 logic models which identified needs that aligned with the top three needs from the Community Needs Assessment. They also reviewed the 2023-2025 Strategic Plan and were provided updates on the success of specific strategies and progress in meeting stated goals. On May 14, 2024, the Board reviewed the agency’s Mission and Vision statements and participated in activities to determine if the existing language met with the CSBG criteria as well as the goals/objectives of the agency and the needs of the community. The consensus was that the Mission Statement addressed CSBG criteria and no changes were suggested or made.

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

The strategic plan represents a long-term three-year plan used by the agency for decision making with identification of short term, intermediate and long term goals. It includes data from the 2022-2024 needs assessment and identifies the top needs to be addressed over the course of the three years. The CAP plan builds upon the Strategic plan, identifies short- term goals (needs to be addressed and the expected outcomes to be achieved) that the agency will focus on during this fiscal year (2025). Connections between the plans are evident across the needs sections. As there is a time lapse of nearly 12 months from the time that a new community needs assessment is completed and the expiration of the current 3-year strategic plan, this must be taken into account. In 2025, LIFT will begin the process of developing a new 3-year strategic plan. That plan will reflect the needs as identified in the 2025-2027 Community Needs Assessment Report.

The one constant between the new (2025-2027) Community Needs Assessment and the current 2022-2025 Strategic Plan is Housing (need for increased safe, decent, affordable housing options). The new C.N.A. reflects the other top needs as Youth Services and Transportation which is significantly different from the previous needs of Substance Abuse/Use services and Economic/Community Development. Both plans are very representative of the CSBG goals, mandates, organizational standards and LCAA's mission to address needs that will serve to help individuals/families on the path to self- sufficiency.

As 2025 was a new Community Needs Assessment year for LIFT CAA and the Community Needs Assessment was completed and approved in January 2025, the current Strategic Plan reflects only the "Housing" needs as identified for the top three. Strategies listed here in the FY2025 CAP plan are reflective of the most recent 2025-2027 Community Needs Assessment and the new strategic plan (when written/approved) will be reflective of the 2025-2027 C.N.A..

The FY24 final logic models with results are uploaded within the application in the pre- award excel workbook.

Evaluate last year's performance (2024) and determine what will be done differently this year (in 2025).

The Final Logic Models for 2024 were presented to the Board during the November 12th, 2024 Board meeting. Specific strategies identified in the logic models were discussed as well as results for each of the top three needs and the agency level need of Capacity Building. They are uploaded within the excel workbook titled Pre-Award Agency Questionnaire.

The presentation of results included outcomes/goals that had been achieved up through October 31, 2024. Therefore, two months was still remaining within the year to achieve stated outcomes. Reports pulled from CAPTAIN and other tracking methods showed that outcomes had been achieved or exceeded for two of the four needs (Substance Use and the Agency goal to build capacity). The economic development objective was to increase rentals at the Hugo Lake Cabins and the Hospitality House by 5% from 2023 rental activities. This was achieved at 75% of the goal; The housing goal was achieved at 81%. The objective was to have 70 of 80 homes weatherized by end of year. At the time of pulling the reports (10/31/2024) 57 or 81% of the goal had been achieved.

The 2025 planning logic models are included within the excel workbook upload titled Pre-Award Agency Questionnaire.

LCAA utilized ODOC's Logic Model Checklist to ensure that the 2025 Logic models include clear outcomes that match the prioritized needs in the C.N.A. which are Housing, Transportation, Youth Services, an Agency need for Capacity Building. The planning logic models are included within the excel workbook uploaded in the application titled Pre-Award Agency Questionnaire.

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

Program performance goals are set based on a variety of factors. First and foremost, LIFT Community Action Agency, Inc. uses the community needs assessment as a tool and guide to look for opportunities that address the needs as identified by the community. The planning department works with program staff, including leadership, supervisors, front- line and support staff to ensure there is a clear understanding of the programs and outcomes. That information is then written within the planning department but is representative of the data shared by those who operate the programs. The outcomes are designed to align with the program goals and objectives. For example, Rental Housing has a goal to increase opportunities for people to obtain safe, decent and affordable housing with an objective to build approximately 2 new units for families of low-income. Therefore, the outcome listed in the performance measurement outcome spreadsheet would align with this program outcome.

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

LIFT CAA operates programs that address the needs of youth, such as Head Start, Early Head Start, Early Head Start/Child Care Partnership, Early Learning Centers, YouthBuild, Healthy Start, and Drug Free Communities Support Program (ended September 29, 2024). LCAA will continue to seek funding to expand these programs and to develop additional programs that promote positive youth development.

Other programs focused on promoting positive youth development include the CASA (Court

Appointed Special Advocate) Program which utilizes trained CASA volunteers to be the voice for children in the court system and Healthy Start which serves women as well as infants and toddlers through age 18 months. Through this program, participants receive services aimed at improving health outcomes of newborns and decreasing infant mortality rates, which in large part, focuses on improving the health and encouraging healthy lifestyles of the mother. LCAA partners with members from the health community including OBGYN's, nurses and others to achieve the program goals.

More than 700 youth receive direct services through the agency's HS/EHS and Early Head Start/Child Care programs. Eligibility requirements for enrollment in these programs require that a significant percentage of the children enrolled represent households with low-incomes. These children receive educational services that serve to improve not only their cognitive skills but also social and emotional skills. While in the classroom, they receive healthy nutritious meals and snacks.

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

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

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

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

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

In addition, LCAA pursues numerous funding opportunities each year in which partnerships/formal MOU's are entered into with Southern Workforce Board as a coordinated effort to achieve the stated goals. LCAA and SWB have a long standing and good working relationship.

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

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

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

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

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

For the past fourteen years, LCAA has partnered with International Paper Foundation, civic organizations, residents and other community-based organizations locally to raise funds for the food baskets provided to families during the Thanksgiving and Christmas holiday seasons. On average, more than 50 families receive food baskets annually through these ongoing events which will continue through 2025.

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

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

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

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

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

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

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

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

LIFT Community Action Agency, Inc. is a member of the county coalitions in each county within the agency's service area. The coalitions represent every sector of the community. Members meet monthly and LCAA is well represented at each meeting. LCAA will continue to partner with other entities/organizations, establishing MOU's when applicable in order to address shared goals to improve the lives of families, especially those with low incomes and to address needs within the service area.

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

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

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

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

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

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

Success will defined as having achieved at least 75 percent of the stated outcomes as identified in the logic models. Success will also be measured by increased positive feedback from customers as reflected in the customer satisfaction surveys. Success will also involve increased or enhanced services and partnerships that directly address the prioritized needs (Housing, Transportation and Youth Services). And success will also involve the creation or enhancement of partnerships/collaboration efforts so as to ensure all available resources are being utilized for addressing community needs. LCAA will utilize CAPTAIN and other tracking systems to identify agency staff, board and volunteer training hours to assess agency and stakeholder capacity. Success in terms of agency capacity will securing additional facilities and/or expanding current facilities to accommodate growing programs/services.

Implementation of Services and Strategies

Sections of the CAP such as Logic Models, PMO spreadsheet, that clearly show specific strategies will be shared across programs, with leadership and the Board. These sections will serve as the "roadmap" to help program staff stay on track with working towards the goals and objectives. The entire CAP plan will be shared by email, in paper format, through discussion, etc. with leadership (including Board members), program directors, supervisors, front-line and support staff. This will ensure that all staff are aware of the expected outcomes identified within the CAP for FY2025 which will be a primary focus of agency activities over the year. It will be discussed in detail with Board members who will all be provided copies. Review and analysis of the CAP will occur no less than twice a year for outcome reports and quarterly through customer reports presented to staff and board.

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

LCAA operates several programs that provide case management including Lending, Head Start, Early Head Start, Early Head Start-Child Care Partnership, Healthy Start, Housing and more. Case management is provided to clients seeking loan funds to help them become loan eligible; services would include credit counseling, budgeting, financial coaching, etc.; Case management is provided to parents/primary caregivers of HS/EHS and EHS/CC youth by Family Advocates working with each family towards setting and achieving goals. Case management is also provided by Housing Coordinators with clients seeking housing services. In the area of housing, case management may involve provision of credit counseling as well as helping families work with creditors to reduce debt (in some cases, having debt written off); budgeting; saving; financial fitness; refinancing home loans to reduce interest rates and more. The housing counselors maintain regular contact with the customers to encourage them and help them "stay on track" so as to increase their chance to improve their current financial situation. The goal is to reduce debt, increase income and become more self-sufficient. Healthy Start clients receive case management through follow up activities provided by the care coordinators to ensure that health screening appointments were kept as well as other activities that serve to support the program goals. Other program participants receive case management via the applicable program staff which serves to facilitate continued participation.

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

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

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

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

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

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

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

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

Observations of Results and Reporting the Achievement of Results

Data will be collected by assigned/appropriate data collection staff in each program and for each need identified in the logic models. This data comes from client intake forms and is transferred into CAPTAIN and/or other tracking systems. Data/outcomes will be reviewed monthly by the CAPTAIN administrator. The CAPTAIN administrator shares reports with program staff on a monthly basis and with the Board no less than once per year. Logic models are included for both FY24 Final and FY25 Planning within the Pre- Award Agency Questionnaire excel workbook.

Information for the CSBG Annual report comes primarily from CAPTAIN reports. The information is used to help better understand who represents the agency's clients; to ensure services are being targeted and provided to the target audiences of individuals/families with low-incomes; as a tool for decision making and planning purposes. The CAPTAIN administrator will share annual report data with leadership, board and staff. Initial data input occurs at the program level by assigned and trained CAPTAIN data entry personnel. Financial modules are completed by the fiscal department. Additionally, the ROMA/CSBG Administrator works with program staff to set targets, etc.

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

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

Analysis of Data and Evaluation

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

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

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

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

Performance evaluation is ongoing throughout the year. However, a more formal evaluation is conducted towards the end of the year in preparation for completion of the CSBG Annual Report, Board Trainings/Reports; Review of the CAP and Strategic Plans, etc. The final formal performance evaluation for 2024 began in October of 2024 and started with a review of the logic models. The next step was to generate CAPTAIN and other reports to determine if the stated outcomes within the logic models had been met.

The logic models with results were shared with leadership, front-line staff, directors and the Board. Also, a review by staff over the performance measurement outcomes was completed. This occurred initially with the CAPTAIN administrator, planning director, front-line staff and leadership. Each program was reviewed and Program Directors as well as front line staff provided updates as to challenges, opportunities, etc. that were faced by their respective programs.

The Planning Director and the CAPTAIN Administrator held several in-depth discussions with program staff to determine if all outcomes that can be captured were being captured and if any additional data needed to be added for tracking. This is considered "Program Level Evaluation." Evaluation analysis reports over program outcomes were provided to the board on November 12, 2024 by the CAPTAIN Administrator. No significant changes will occur.

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

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

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

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

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

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

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

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

App#	Name	Case Type	Service	Service Date	Outcome	Date
00000030	CHOCTAW/PUSHMATAHA COUNTY YOUTH SERVICES	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000031	DEPARTMENT OF HUMAN SERVICES CHOCTAW COUNTY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5k. - Health Service Organizations	12/11/2024
00000032	DEPARTMENT OF HUMAN SERVICES MCCURTAIN COUNTY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5k. - Health Service Organizations	12/11/2024
00000033	DEPARTMENT OF HUMAN SERVICES PUSHMATAHA COUNTY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5k. - Health Service Organizations	12/11/2024
00000037	KIAMICHI TECHNOLOGY CENTER CHOCTAW COUNTY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5i. - Institutions of Post-Secondary Education/Training	12/11/2024
00000038	KIAMICHI TECHNOLOGY CENTER MCCURTAIN COUNTY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5i. - Institutions of Post-Secondary Education/Training	12/11/2024
00000044	SOS FOR FAMILIES	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000045	OSU EXTENSION CHOCTAW COUNTY	Community Partner	Community-Wide Partnerships	11/26/2024	B.5i. - Institutions of Post-Secondary Education/Training	11/26/2024
00000045	OSU EXTENSION CHOCTAW COUNTY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5i. - Institutions of Post-Secondary Education/Training	12/11/2024
00000046	OSU EXTENSION MCCURTAIN COUNTY	Community Partner	Community-Wide Partnerships	12/12/2024	B.5i. - Institutions of Post-Secondary Education/Training	12/12/2024
00000047	OSU EXTENSION PUSHMATAHA COUNTY	Community Partner	Community-Wide Partnerships	11/26/2024	B.5i. - Institutions of Post-Secondary Education/Training	11/26/2024
00000047	OSU EXTENSION PUSHMATAHA COUNTY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5i. - Institutions of Post-Secondary Education/Training	12/11/2024
00000064	HUGO POLICE DEPARTMENT	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000086	AMERICAN LEGION POST 8	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000089	ANTLERS PUBLIC LIBRARY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000093	BROKEN BOW HEALTH & REHAB	Community Partner	Community-Wide Partnerships	12/12/2024	B.5k. - Health Service Organizations	12/12/2024
00000094	BROKEN BOW NUTRITION CENTER	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000101	COLONIAL LODGE RETIREMENT CENTER	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000103	EAGLETOWN SENIOR CITIZEN CENTER	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000104	FINLEY LIBRARY	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000105	FINLEY NUTRITION CENTER	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000110	GOLDEN SENIOR CITIZEN CENTER	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000111	GRACEFULLY YOURS	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000112	HAND TO HAND FOOD BANK	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000113	HILLS NURSING HOME	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000114	CHOCTAW NATION SERVICE CENTER - HUGO	Community Partner	Community-Wide Partnerships	12/12/2024	Tribal Government	12/12/2024
00000118	MCCURTAIN COUNTY VETERANS MEMORIAL MUSEUM	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000120	MEMORIAL HEIGHTS NURSING HOME	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000121	MESSER SENIOR CITIZEN CENTER	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000122	NASHOBA COMMUNITY CENTER	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000123	PUSHMATAHA COUNTY HISTORICAL SOCIETY	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000127	SAWYER SENIOR CITIZEN CENTER	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000128	SHARING HOPE FOOD BANK	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000131	TOM SENIOR CITIZEN CENTER	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000135	WRIGHT CITY SENIOR CITIZENS CENTER	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024

00000142	HOUSING & URBAN DEVELOPMENT	Community Partner	Community-Wide Partnerships	12/12/2024	B.5g. - Consortiums/Collaborations	12/12/2024
00000143	HOUSING ASSISTANCE COUNCIL	Community Partner	Community-Wide Partnerships	12/11/2024	B.5g. - Consortiums/Collaborations	12/11/2024
00000146	MICHELE APLIN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000153	MARY BLANKENSHIP DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000159	STACEY BURCHFIELD DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000161	MELANIE CADY DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000167	TRACY COHEE DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000171	TERI DALLIS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000173	ELAINE DEAN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000174	SHIRLEY LEWIS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000175	KIM DEMAS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000176	BRENDA DERVIN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000179	RESHONE EGGLESTON DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000181	TAMMY FINES DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000188	AMBER GARCIA DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000191	JANELLE GILBERT DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000192	CYNTHIA GODWIN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000193	CHRISTINA GOOCH DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000194	BRENDA GREEN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000195	SANDRA GRIMSLEY DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000197	LISA HAMILTON DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000198	ROSANN HANES DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000203	ROSA HERNANDEZ DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000205	SONYA HILL DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000210	KIM JOHNSON DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000213	LAMARA JONES DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000216	KRISTIE LAMBERT DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024

00000219	SHELLY LEIGH DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000222	MARIA LOPEZ DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000223	MYNISHIA MALONE DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000224	CAROLYN MANN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000227	LASHAWN MARTIN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000229	EDIE MARTZALL DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000230	LUELLEN MCCLESKEY DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000239	CARRIE MORENO DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000242	HEIDI MULLER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000251	STACI POLLARD DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000252	CAROLYN PULLEN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000254	CAROL RANKIN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000255	PAM REDFORD DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000257	BRIDGET RICHARDS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000264	RACHELLE SANDERS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000265	THERESA SHIRLEY DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000266	VICTORIA SISSOM DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000267	LATOSHA SLOAN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000269	ANGELA SMITH DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000278	MELISSA TAYLOR DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000279	JULIE TUCKER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000280	KENYETTA TURNER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000281	YOLANDA TURNER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000282	KAMI TYLER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000284	CHRISTY VUNETICH DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000287	LISA WALSTON DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000288	TAMMY WARD DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024

00000289	KIMBERLY WATSON DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000290	TINA WEAVER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000295	SHERRY WILLIAMS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000335	OKLAHOMA STATE DEPARTMENT OF EDUCATION	Community Partner	Community-Wide Partnerships	12/31/2024	B.5d. - State Government	12/31/2024
00000336	CITY OF ANTLERS	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000337	CITY OF HUGO	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000340	OKLAHOMA ASSOCIATION OF COMMUNITY ACTION AGENCIES	Community Partner	Community-Wide Partnerships	12/11/2024	B.5l. - Statewide Associations or Collaborations	12/11/2024
00000343	OKLAHOMA HEALTH CARE AUTHORITY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5k. - Health Service Organizations	12/11/2024
00000349	SOUTHEASTERN OKLAHOMA STATE UNIVERSITY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5i. - Institutions of Post-Secondary Education/Training	12/11/2024
00000359	DEEP FORK COMMUNITY ACTION FOUNDATION	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000380	OKLAHOMA HOUSING FINANCE AGENCY	Community Partner	Community-Wide Partnerships	12/12/2024	B.5l. - Statewide Associations or Collaborations	12/12/2024
00000388	LIFT TRANSIT SYSTEM	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000392	CASA- LIFT	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000392	CASA- LIFT	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000395	MCCURTAIN MEMORIAL HOSPITAL AUXILIARY	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000396	MEN UNITED	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000396	MEN UNITED	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000410	HOUSEABOUTIT LITTLE ROCK, AR	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000411	UNIVERSAL HOUSING DEV CORP RUSSELLVILLE, AR	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000419	FAMILY RESOURCES OF N.O. INC NEW ORLEANS, LA	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000429	KIAMICHI FAMILY MEDICAL CENTER-IDABEL	Community Partner	Community-Wide Partnerships	12/12/2024	B.5a. - Non-Profit	12/12/2024
00000429	KIAMICHI FAMILY MEDICAL CENTER-IDABEL	Community Partner			B.5k. - Health Service Organizations	12/12/2024
00000436	PUSHMATAHA COUNTY COALITION	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000437	CHOCTAW COUNTY COALITION	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000438	MCCURTAIN COUNTY COALITION	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000444	CHOCTAW NATION	Community Partner	Community-Wide Partnerships	12/11/2024	Tribal Government	12/11/2024
00000445	PUSHMATAHA COUNTY MULTIDISCIPLINARY TASK FORCE	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000446	CHOCTAW COUNTY MULTIDISCIPLINARY TASK FORCE	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000447	MCCURTAIN COUNTY MULTIDISCIPLINARY TASK FORCE	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000448	PUSHMATAHA COUNTY COMMUNITY CRISIS RESPONSE TEAM	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000449	CHOCTAW COUNTY COMMUNITY CRISIS RESPONSE TEAM	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000450	MCCURTAIN COUNTY COMMUNITY CRISIS RESPONSE TEAM	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000451	PUSHMATAHA COUNTY COURTS	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000452	CHOCTAW COUNTY COURTS	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024

00000475	LIFT HEAD START	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000480	FEDERAL HOME LOAN BANK	Community Partner	Community-Wide Partnerships	12/12/2024	B.5j. - Financial/Banking Institutions	12/12/2024
00000490	GRETTA EVANS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000493	KARON TEURMAN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000496	MONTOYA BOAZ DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000524	TERRY PARK/CHOCTAW COUNTY SHERIFF	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000545	OKLAHOMA HEALTHCARE AUTHORITY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5k. - Health Service Organizations	12/11/2024
00000546	SPROUTS DEVELOPMENT	Community Partner	Community-Wide Partnerships	12/12/2024	B.5a. - Non-Profit	12/12/2024
00000547	PUSHMATAHA FAMILY MEDICAL CLINIC	Community Partner	Community-Wide Partnerships	12/12/2024	B.5a. - Non-Profit	12/12/2024
00000547	PUSHMATAHA FAMILY MEDICAL CLINIC	Community Partner			B.5k. - Health Service Organizations	12/12/2024
00000550	BROKEN BOW POLICE DEPARTMENT	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000553	PROJECT GAIN	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000557	UNITED STATES DEPT. OF AGRICULTURE	Community Partner	Community-Wide Partnerships	12/12/2024	B.5e. - Federal Government	12/12/2024
00000565	MEGAN HORN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000569	CHARLESIA KOSANKE DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000570	LATOYA BILLS	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000576	OKLAHOMA CASA	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000577	NATIONAL CASA	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000578	PUSHMATAHA COUNTY SHERIFF DEPARTMENT	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000579	MCCURTAIN COUNTY SHERIFF DEPARTMENT	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000580	KIDS KOTTAGE	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000581	WEE CARE PREGNANCY CENTER	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000620	CHOCTAW COUNTY LIBRARY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000624	NEIGHBORWORKS AMERICA	Community Partner	Community-Wide Partnerships	12/12/2024	B.5e. - Federal Government	12/12/2024
00000627	PENNEY RODGERS	Community Partner	Community-Wide Partnerships	12/11/2024	B.5f. - For-Profit Business or Corporation	12/11/2024
00000632	IDABEL PUBLIC LIBRARY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000646	CELESTINE WATSON DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000647	CRYSTEL BURDEN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000649	DESTINY SANDERS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000651	KATRINA PICKETT DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000656	MAGGIE MONROE DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000678	JENNIFER DUNCAN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000680	TANYA REVELS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024

00000694	CRAWFORD SEBASTIAN COMMUNITY DEVELOPMENT COUNCIL	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000695	NORTHWEST REGIONAL HOUSING AUTHORITY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000696	NORTHEAST COMMUNITY ACTION CORPORATION	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000697	NATIONAL RURAL HOUSING COALITION	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000698	SOUTHWEST REGIONAL HOUSING AND CDC	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000699	TIERRA DEL SOL HOUSING CORPORATION	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000700	ZUNI HOUSING AUTHORITY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000701	TRI-COUNTY INDIAN NATIONS CDC	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000702	INTER-LAKES COMMUNITY ACTION PARTNERSHIP, INC	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000703	COMMUNITY DEVELOPMENT CORPORATION OF BORWNSVILLE	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000704	PROYECTO AZTECA, INC	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000706	NATIONAL RURAL SELF-HELP HOUSING ASSOCIATION	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000708	HOUSE ON THE ROCK- MCCURTAIN COUNTY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5b. - Faith Based	12/11/2024
00000715	LIFT SELF-HELP HOUSING	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000737	CHASITIE WOLFE	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000738	AURIEL GREEN	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000742	SOUTHERN WORKFORCE BOARD	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000746	COMMUNITY RESOURCE TECHNICIAN, INC	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000748	LIBERTY RESTORATION COMMUNITY DEVELOPMENT	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000749	INTEGRITY HOMEBUYERS ASSOCIATION	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000750	HABITAT FOR HUMANITY ST. TAMMY WEST	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000752	HIGH PLAINS COMMUNITY DEVELOPMENT CORP.	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000755	HELPING HANDS NOW	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000756	NEIGHBORHOOD HOUSING SERVICES OF OKC	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000757	NEIGHBORHOOD HOUSING SERVICES OF WACO, INC	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000758	FAMILY DESTINY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000759	ED 360	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000770	JESSICA STEWART DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000772	AMANDA CLEEK DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000773	KALEIGH STRICKLAND DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000774	OKLAHOMA DISTRICT ATTORNEY COUNCIL	Community Partner	Community-Wide Partnerships	12/11/2024	B.5d. - State Government	12/11/2024
00000775	CHOCTAW COUNTY SHERIFF OFFICE	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000776	IDABEL POLICE DEPARTMENT	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000777	ANTLERS POLICE DEPARTMENT	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000778	MAGNOLIA CDC	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024

00000779	LAKE AREA CDC	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000784	CARE ONE ADVOCATE	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000785	AHAYAH COMMUNITY DEVELOPMENT CORP	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000786	B.R.A.C.E.S .	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000787	DECHELLES HOUSE	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000788	TANGI COMMUNITY DEVELOPMENT CORP	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000789	TAMMIE HOGAN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000791	ASHLEY HOWARD DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000792	BRENDA SUMPTER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000793	REGINA BIRDSONG DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000795	ALICIA MCKEE DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000796	ANYAAE GENTRY DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000797	XOCHILT MALDONADO DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000799	RAEKEISHA WATKINS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000800	TAMI JOHNSTON DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000801	CASSANDRA CARR DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000802	MARSHALYNN JEFFRIES DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000808	CATHY RUTHERFORD DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000809	CHERLANDRA FLETCHER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000810	YVETTE SNELL DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000811	RACHEL GOIN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000815	JEFFERY LUCAS	Community Partner	INFO: Use this branch when entering BULK #'s (run adhoc for total report counts)	02/14/2024		
00000815	JEFFERY LUCAS	Community Partner	INFO: Use this branch when entering BULK #'s (run adhoc for total report counts)	03/14/2024		
00000815	JEFFERY LUCAS	Community Partner	INFO: Use this branch when entering BULK #'s (run adhoc for total report counts)	05/15/2024		
00000817	FBC FREE CLINIC	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000818	GARVIN NUTRITION CENTER	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000819	HUGO HERITAGE RAILROAD AND MUSEUM	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000820	HISTORIC HEART OF IDABEL	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000821	PUSHMATAHA COUNTY HOSPITAL AUXILIARY	Community Partner	Community-Wide Partnerships	11/26/2024	B.5a. - Non-Profit	11/26/2024
00000822	IDABEL CHAMBER OF COMMERCE	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024

00000823	BROKEN BOW CHAMBER OF COMMERCE	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000824	DYNAMIC WORKFORCE	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000825	MAN POWER	Community Partner	Community-Wide Partnerships	12/11/2024	B.5f. - For-Profit Business or Corporation	12/11/2024
00000826	LIFT HEALTHY START	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000827	MCCURTAIN COUNTY HEALTH DEPARTMENT	Community Partner	Community-Wide Partnerships	12/11/2024	B.5k. - Health Service Organizations	12/11/2024
00000828	TYSONS IDABEL	Community Partner	Community-Wide Partnerships	12/11/2024	B.5f. - For-Profit Business or Corporation	12/11/2024
00000829	PSSI FOOD SAFETY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5f. - For-Profit Business or Corporation	12/11/2024
00000830	BROKEN BOW CITY HALL	Community Partner	Community-Wide Partnerships	12/11/2024	B.5c. - Local Government	12/11/2024
00000831	INTERNATIONAL PAPER	Community Partner	Community-Wide Partnerships	12/11/2024	B.5f. - For-Profit Business or Corporation	12/11/2024
00000832	MCCURTAIN FAMILY MEDICAL	Community Partner	Community-Wide Partnerships	12/11/2024	B.5f. - For-Profit Business or Corporation	12/11/2024
00000833	MCCURTAIN COUNTY NATIONAL	Community Partner	Community-Wide Partnerships	12/11/2024	B.5f. - For-Profit Business or Corporation	12/11/2024
00000834	MUSEUM OF THE RED RIVER	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000835	PINE CELLULAR	Community Partner	Community-Wide Partnerships	12/11/2024	B.5f. - For-Profit Business or Corporation	12/11/2024
00000836	WEYEHAEUSER IDABEL	Community Partner	Community-Wide Partnerships	12/11/2024	B.5f. - For-Profit Business or Corporation	12/11/2024
00000837	BREAD OF LIFE	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000838	BUCKNER INTERNATIONAL	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000839	GOODLAND ACADEMY	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000840	FIRST UNITED BANK AND TRUST	Community Partner	Community-Wide Partnerships	12/11/2024	B.5j. - Financial/Banking Institutions	12/11/2024
00000841	OKLAHOMA BUREAU OF NARCOTICS	Community Partner	Community-Wide Partnerships	12/11/2024	B.5d. - State Government	12/11/2024
00000842	PARENTS HELPING PARENTS	Community Partner	Community-Wide Partnerships	12/11/2024	B.5a. - Non-Profit	12/11/2024
00000843	BOGALUSA REBIRTH	Community Partner	Community-Wide Partnerships	12/26/2024	B.5a. - Non-Profit	12/26/2024
00000844	COMMUNITY TRAINING AND RESEARCH INSTITUTE	Community Partner	Community-Wide Partnerships	12/26/2024	B.5a. - Non-Profit	12/26/2024
00000845	DOWNTOWN NEIGHBORHOOD ASSOCIATION	Community Partner	Community-Wide Partnerships	12/26/2024	B.5a. - Non-Profit	12/26/2024
00000846	GUADALUPE ECONOMIC SERVICES CORPORATION	Community Partner	Community-Wide Partnerships	12/26/2024	B.5a. - Non-Profit	12/26/2024
00000847	HELPING HANDS TEAM	Community Partner	Community-Wide Partnerships	12/26/2024	B.5a. - Non-Profit	12/26/2024
00000848	JAMES VALLEY HOUSING INC	Community Partner	Community-Wide Partnerships	12/26/2024	B.5a. - Non-Profit	12/26/2024
00000849	JERICHO ROAD EPISCOPAL HOUSING INITIATIVE	Community Partner	Community-Wide Partnerships	12/26/2024	B.5a. - Non-Profit	12/26/2024
00000850	LOUISIANA HOME RESOURCES	Community Partner	Community-Wide Partnerships	12/26/2024	B.5a. - Non-Profit	12/26/2024
00000851	MILTON HOME BUYER	Community Partner	Community-Wide Partnerships	12/26/2024	B.5a. - Non-Profit	12/26/2024
00000852	SPIRIT LOVE FOUNDATION	Community Partner	Community-Wide Partnerships	12/26/2024	B.5a. - Non-Profit	12/26/2024
00000853	T.U.F.F KIDS	Community Partner	Community-Wide Partnerships	12/26/2024	B.5a. - Non-Profit	12/26/2024
00000854	WEST 30'S REDEMPTION COMPANY, INC.	Community Partner	Community-Wide Partnerships	12/26/2024	B.5a. - Non-Profit	12/26/2024
00000855	VENESSA OSBURN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000856	CINDY ROSE DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000857	MELISSA BEASON DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024

00000858	NORMA MALDONADO DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000859	JENNIFER SPEER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000860	MARIA REINHARDT DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000861	JAMIE ROBINSON DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000862	DAWN TEAGUE DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000863	JANIS HANSON DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000864	BARBARA STUBBS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000865	KAREN MAURO DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000866	EUSTOLIA MALDONADO DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000867	JOEY STEVENS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000868	JESSICA WALKER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000869	VALERIE WILLIAMS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000870	DESIREE WOMACK DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000871	TINA BRUNER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000872	ERICA BECERRA DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000873	MISTY REYES DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000874	SHAKITA ANDERSON DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000875	BARBARA JONES DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000876	STEPHANIE FREEMAN DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000877	NIKA SEIGLER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000878	GINGER GRAMMER DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000879	MESHELL MACON DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000880	TERRI FAILS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000881	EARNESTINE KHALID DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024
00000882	ANTONIA COATS DCH	Community Partner	Community-Wide Partnerships	12/31/2024	B.5f. - For-Profit Business or Corporation	12/31/2024

2025 ROMA LOGIC MODEL

Organization: LIFT Community Action Agency, Inc. **Program:** Housing ☒ Family ☒ Community ☐ Agency

Need	Service/ Activity	Outcome	Outcome Indicator	Results*	Measuresment Tool	Data Source, Data Collection Procedures, Personnel (Where, How, Who)	Frequency of Data Collection and Reporting
Families have a need for safe, decent and affordable housing.	LIFT will build 5 new homes through the Housing Stability Program.	Increased safe, decent and affordable housing geared towards low-income families.	By 12/31/2025 2 out of the 5 homes or (40%) will be completed and ready to sell.	100% 2/5 Homes have been completed in 2025 and ready to sell.	Number of homes built.	The Housing Director will track the progress of the construction of two homes during FY 2025 using project management software and regular site inspections. Data will be collected through construction reports, financial records, and stakeholder meetings to ensure timely completion and adherence to budget.	Data will be reported to the Board annually via the udated logic models which reflect the actual results achieved.

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

Proxy Outcome:

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

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

2025 ROMA LOGIC MODEL

Organization: LIFT Community Action Agency, Inc. **Program:** Transportation ☐ Family ☒ Community ☒ Agency

Need	Service/ Activity	Outcome	Outcome Indicator	Results*	Measuresment Tool	Data Source, Data Collection Procedures, Personnel (Where, How, Who)	Frequency of Data Collection and Reporting
Our Community has a need for increased transportation services.	Increase after-hours transit services by providing an additional 24 hours of service per month (after 4 p.m. and on weekends) through the PICK mobile application.	Enhanced accessibility and mobility for low-income community members, leading to improved access to employment, education, healthcare, and social activities.	By 12/31/2025 the number of after hours transit services provided will increase to 144.	156.25% We have exceded this goal by offering more service hours then anticipated.	Number of hours provided.	The Transit Director will track the utilization of after-hours transit services using the Ride With Via application, along with Transit Driver hours and reports. Data will be collected through ride logs, driver timesheets, and monthly service reports to monitor and evaluate the increased service provision.	Data will be reported to the Board annually via the udated logic models which reflect the actual results achieved.

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

Proxy Outcome:

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

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

2025 ROMA LOGIC MODEL

Organization: LIFT Community Action Agency, Inc. **Program:** Youth Services ☒ Family ☒ Community ☐ Agency

Need	Service/ Activity	Outcome	Outcome Indicator	Results*	Measuresment Tool	Data Source, Data Collection Procedures, Personnel (Where, How, Who)	Frequency of Data Collection and Reporting
Our Community has a need for safe and reliable Youth Activities.	Develop/implement youth programming that provides a safe environment for children and teenagers, offering educational and social supports, recreational activities, and mentorship opportunities.	Youth programming participants will experience enhanced social skills and increased engagement in safe and positive recreational activities, contributing to their overall well-being and development	By 12/31/2025, the implemented youth program will provide services to 50 youth.	100% 50 Youth have received Youth Servicves through programing.	Number of youth involved in youth programs geared towards enhanced social skills and increased engagement in safe and positive recretional activities.	Programmatic staff for youth services will track the utilization information using attendance records and activity logs. Data will be collected through sign-in sheets, program participation reports, and regular staff evaluations to ensure the goal of serving 50 youth per year is met.	Data will be reported to the Board annually via the udated logic models which reflect the actual results achieved.

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

Proxy Outcome:

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

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

2025 ROMA LOGIC MODEL

Organization: LIFT Community Action Agency, Inc. **Program:** ☐ Family ☐ Community ☒ Agency

Need	Service/ Activity	Outcome	Outcome Indicator	Results*	Measuresment Tool	Data Source, Data Collection Procedures, Personnel (Where, How, Who)	Frequency of Data Collection and Reporting
Our agency has a need for increased office facilities to house new program staff.	LIFT will identify and obtain two additional office buildings to house new program staff.	Increased access to services due to additional facilites obtained.	By 12/31/2025 atleast one facility will be obtained (through rental or purchase) to house agency staff.	100% The Antlers HUB was purchased in 2025.	Number of facilities obtained.	The Administrative Assistant/CSBG Administrator/Public Relations Specialist will track the acquisition of new facilities using real estate listings, purchase agreements, and facility inspection reports. Data will be collected through property records, financial documents, and regular progress updates to ensure the goal of obtaining at least one new facility by December 31, 2025, is met.	Data will be reported to the Board annually via the udated logic models which reflect the actual results achieved.

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

Proxy Outcome:

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

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

LIFT COMMUNITY ACTION AGENCY, INC.'S

Strategic plan

2023-2025

Board Approved:

December 13, 2022

EXECUTIVE SUMMARY

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

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

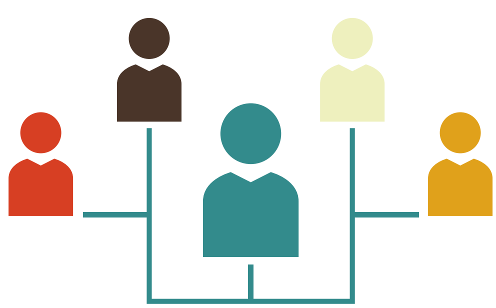
Key staff involved in facilitating the strategic planning process attended conferences and trainings presented by National Community Action Partnership staff. The presenters trained participants on how to incorporate ROMA and how to make sure the plan represents compliance with the Community Service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

The development of this plan involved multiple processes which included:

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

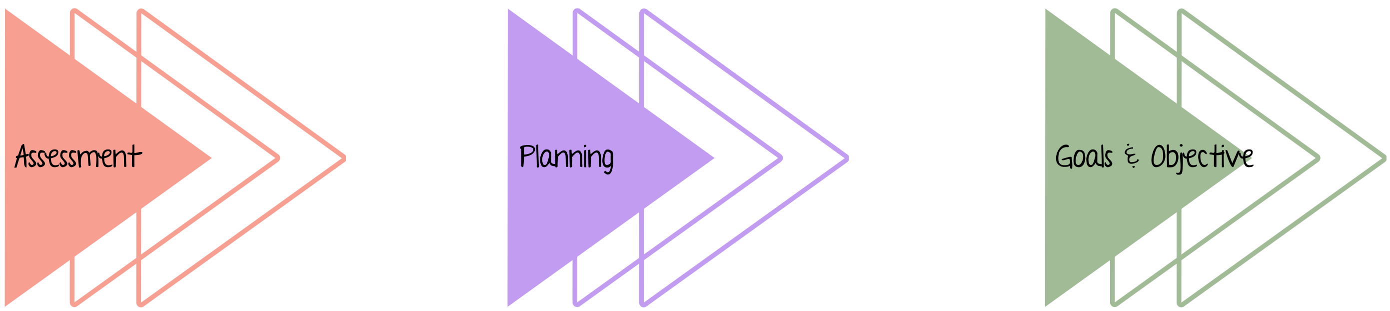
Each process resulted in reviewing and analyzing qualitative and quantitative data. These activities helped with the development of the strategies and benchmarks listed within this plan.

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



STRATEGIC PLANNING PROCESS

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



Surveys, Focus Groups, Needs Prioritization, Environmental Scans and Community Meetings

Review of agency mission, vision, values, SWOT Analysis, ROMA review and ORG Standards, Review of the current CNA, Environmental scan Stakeholder Interviews

Setting goals and determining objectives to establish the results to be achieved, determining specific outcome measures and deciding on a means to achieve the results.

Assessment

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

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

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

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

Planning

Agency Review	SWOT Analysis	Org Standards & ROMA	Community Needs Assessment
Revisited Agency Mission, Vision and Core Values: Conducted Stakeholder interviews	Conducted Strengths, Weaknesses, Opportunities and Threats activity with Board	Reviewed ROMA model and ORG Standards to ensure alignment with Strategic Plan	Reviewed 2022 CNA report. Conducted updated environmental scan

AGENCY REVIEW

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

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

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

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

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

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

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

SWOT ANALYSIS

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

Internal

Helpful

Harmful

Strengths:

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

Weaknesses:

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

External

Opportunities:

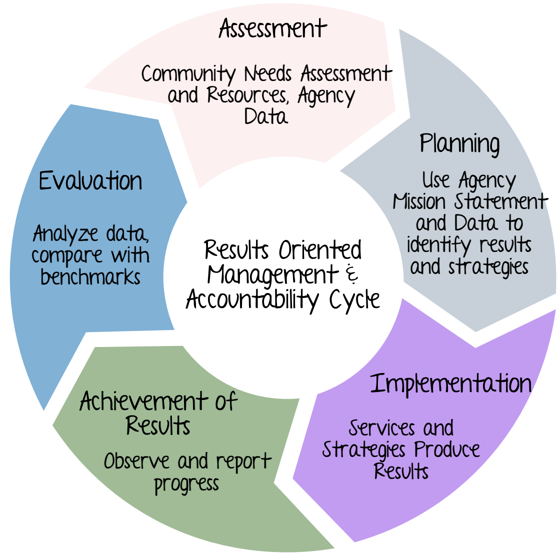
- Multiple Marketing platforms
- Partnerships
- Non-Profit Federal, State and foundation funding streams.
- Strong and large Volunteer base
- Community support and buy-in

Threats:

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

RESULTS ORIENTED MANAGEMENT & ACCOUNTABILITY (ROMA)

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



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

NATIONAL COMMUNITY ACTION NETWORK GOALS

Goal One:

Individuals and families with low incomes are stable and achieve economic security.

Goal Two:

Communities where people with low incomes live are healthy and offer economic opportunity.

Goal Three:

People with low incomes are engaged and active in building opportunities in communities.

ORGANIZATIONAL STANDARDS

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

Primary Org Standards for Strategic Planning

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

Other Org Standards related to Strategic Planning

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

COMMUNITY NEEDS ASSESSMENT

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

Top 3 Prioritized Needs Identified

Housing

Substance Abuse Services

Economic Development

506 Surveys Completed

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

Poverty Statistics

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

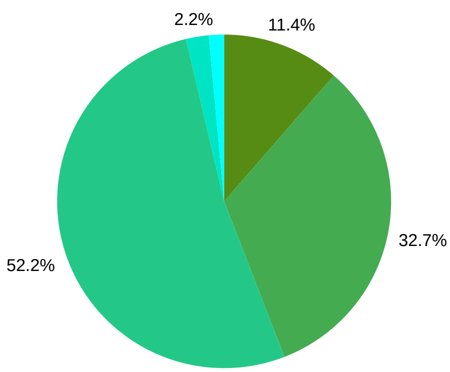
Top 10 Needs Identified

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

CUSTOMER SATISFACTION & INPUT

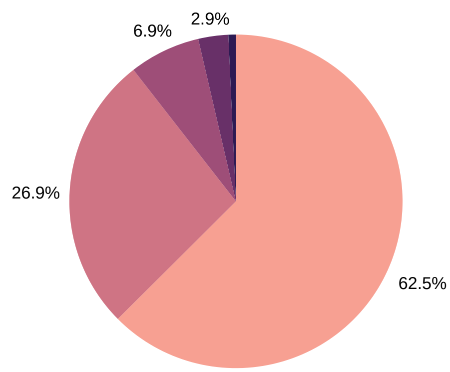
As part of the planning process, the Board reviewed the customer satisfaction data from 2022. Customer Satisfaction data and input is a critical piece to the overall Strategic Plan. The ongoing collection and analysis of customer satisfaction surveys will remain key to LIFT CAA's plan being representative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

County Breakdown



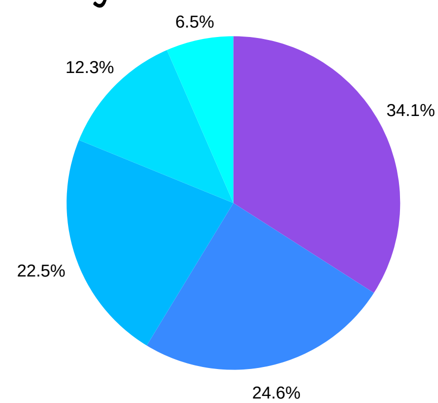
Bryan County - 1.7%
Choctaw County - 52.2%
Pushmataha County - 11.4%
McCurtain County - 32.7%
Other- 2.0%

Method of Awareness



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

Age Breakdown



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

Surveys Completed by each Program

125 HeadStart

69 VITA

21 Apartments

23 Emergency Assistance

18 WX

20 Other Programs

GOALS & OBJECTIVES

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

PRIORITY NEEDS

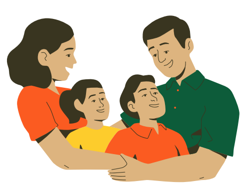
This strategic plan will identify activates and strategies for achieving the goals that align with the needs identified in the 2022 CNA report. The needs represent family, community and agency level needs. The focus of this Strategic Plan will be on program development and it's direct relation to improving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

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

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

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

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



Lift Community Action Agency

Goal 1: Family
To increase housing and housing supportive services for residents in our service area.

Goal 2: Community
Reduce substance use and abuse and improve community awareness.

Goal 3: Community
To improve our local economy and help families move towards self-sufficiency.

Goal 4: Ageny
To increase our capacity to better serve individuals and families of low-income.

#1 HOUSING

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

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

Objective 1	Objective 2	Objective 3
Increase number of new single and multifamily housing units.	Increase number of families receiving housing preservation.	Increase lending resources for mortgage loans.

Strategies	Measures & Benchmarks
Objective 1: Increase number of new single and multifamily housing units. • Submit grant applications for housing opportunities.(single family/multi-family) • strengthen relationships and partnerships with other housing entities. • Help families become loan eligible.	• Submit one federal application each year for housing construction funding. • Construct 3 multi-famaily units by December 2025. • Create and/or Strengthen partnerships/MOU's with 2 housing entities by December 2024. • Provide Housing Counseling to 200 families annually by the end of each calendar year.
Objective 2: Increase number of families receiving housing preservation. • Provide housing weatherization for families of low-income. • Assist families with obtaining minor/moderate housing rehab. • Provide housing education on maintenance and preservation of homes.	• Weatherize 36 homes annually during each calendar year. • Package 10 504 loans/grants annually during each calendar year. • Provide housing maintenance/preservation to 30 families annually during each calendar year.
Objective 3: Increase lending resources for mortgage loans. • Provide T&MA to non traditional lenders. • Assist lenders in making application for CDFI certification. • Assist lenders with locating funding resources.	• LIFT Board, loan and housing staff provide 12 T&MA trainings to SOCDC Board by December 31 2023 and ongoing as needed. • LIFT loan officer assist SOCDC in applying for CDFI certification. • Transfer/sale existing LIFT mortgage loans to SOCDC by June 30 2024. • SOCDC secures 1 Angel investor by December 2024. • SOCDC CDFI fully operational by December 2025.

#2 Substance Abuse

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

Goal

Reduce substance use and abuse and improve community awareness.

Objective 1

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

Objective 2

Establish and strengthen partnerships and collaborations in the community.

Objective 3

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

Strategies	Measures & Benchmarks
Objective 1: Increase community resources and access to substance use/abuse information and services. • Encourage partners to share information. • Create informational flyers/brochures with facts of substance use/abuse. • Utilize social media and other platforms to share information.	• Community based organizations collaborate with LIFT on 5 events annually each calendar year. • 500 informational flyers/brochures distributed to residents annually each calendar year. . • Share information and promote 10 events in local papers, social media and radio annually each calendar year.
Objective 2: Establish and strengthen partnerships and collaborations in the community. • Attend various community organizations meetings and explain purpose • Provide education of services and programs to organizations to promote awareness • Increase organization participation	• Three additional LIFT Employees serve on county coalitions annually each calendar year. • Conduct 6 awareness events at schools, jails and/or other community venues annually during each calendar year. • Collaborate with community based organizations to conduct three events that address substance use/abuse annually each calendar year
Objective 3: Provide education & case management to individuals/families impacted by substance use/abuse. • Provide case management. • Partner with law enforcement to gain access to inmates and other at risk individuals. • Collaborate with area schools to host drug prevention events	• Provide case management to 250 individuals through second chance by December 2024. • Provide life skills education classes to 15 inmates annually each calendar year. • Provide 500 youth with prevention awareness information annually each calendar year.

#3 Economic Development

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

Goal

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

Objective 1

Increase tourism activities to promote local economy.

Objective 2

Improve local tourist facilities.

Objective 3

Increase and improve reactional amenities.

Strategies	Measures & Benchmarks
Objective 1: Increase tourism activities to promote local economy. • Plan and host events. • Partner with community stakeholders. • Promote area attractions.	• Hold 4 recreational events at LIFT operated parks annually each calendar year. • Create 1 tourist planning committee representative of multiple organizations by December 2024. • Use social media to Promote 9 local tourist attractions annually each calendar year.
Objective 2: Improve local tourist facilities. • Secure funding for cabin/hospitality house improvements. • Partner with local community stakeholders.	• Rehab 4 house keeping cabins at Hugo Lake by December 31 2025. • Complete renovations at hospitality house by December 31 2024. • Secure donations from 5 local organizations/businesses by December 31 2025.
Objective 3: Increase and improve reactional amenities. • Make improvements at Hugo Lake Marina. • Repair infostructure at Hugo Lake Park • Increase amenities at Hugo Lake Park	• Replace/repair walkway leading to marina at Hugo Lake by December 31 2023 • Repair boat ramps and pavilions at 3 locations in Hugo Lake Park by December 31 2024 • Construct playground at Hugo Lake Park by December 31 2025

#4 Agency Growth

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

Goal

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

Objective 1	Objective 2	Objective 3
Improve employee satisfaction to reduce turnover	Increase employee capacity for enhanced service provision	Increase annual budget to address community needs

Strategies	Measures & Benchmarks
Objective 1: Improve employee satisfaction to reduce turnover • Employee appreciation events. • Improve working enviorment. • Stress reduction activities.	• Recognize 12 outstanding employees annually each calendar year. • Supervisors and staff participate in 1 EDI training quarterly during each calendar year. • LIFT office locations plan and carryout 1 stress reduction activity monthly each calendar year.
Objective 2: Increase employee capacity for enhanced service provision • Attend trainings/conferences. • Participate in webinars. • Staff attend leadership meetings.	• 10 employees attend 2 trainings/conferences annually each calendar year. • 250 employees participate in weekly webinars/teams meetings annually each calendar year. • 20 Program Directors attend 4 Program Directors meetings annually each calendar year. • Satisfaction levels from CSS will increase by 10% year over year.
Objective 3: Increase annual budget and other resources to address community needs • Seek funding opportunities. • Increase revenues. • Implement new accounting and HR could base software.	• Secure one new grant for new program start up or expansion of existing program annually each calendar year. • Agency program revenue increase by 5% by December 31 2025. (Baseline $22,483,114.) • Netsuite accounting and HR software fully operational by December 31, 2024.

PLAN IMPLEMENTATION & ACCOUNTABILITY

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

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

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

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

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

CONCLUSIONS

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

LIFT PROGRAMS & SERVICES

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

- Rent
- Utility
- Food Assistance

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

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

Lending:

- Business
- Residential

Multi-Family Housing:

- Apartments
- Senior Supportive Housing (HUD 202)

Retired Senior Volunteer Program
Rx for Oklahoma
Safe Place Healing Hearts Program
Second Chance Adult Re-entry
Self-Help Housing
Technical & Management Assistance
Tourism:

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

Transportation:

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

Tri-County Opioid Response Project
Victim Advocacy Services
Volunteer Income Tax Preparation
Weatherization
YouthBuild

NeighborWorks® CHARTERED MEMBER

Lift Community Action Agency

Risk Assessment Executive Summary

Risk Management Basics

This segment of the executive summary contains recommendations related to Risk Management Basics, including the assignment of responsibility for risk management, risk oversight, and risk committees.

Governance Risk

This segment of your executive summary contains priority recommendations to strengthen your board.

- Explore ways to convey and reinforce your agency's mission and purpose, such as through short videos, infographics, or even a draft 'elevator speech.' These tools will be valuable to your board as it works to fully understand what you do, and effectively convey your mission to other stakeholders.
- See the full report for suggestions to increase the engagement and dialogue during Finance Committee presentations.

Facilities and Building Security

This section of your executive summary contains priority recommendations based on your answers to the questions in the Facilities and Building Security Module.

- Review your evacuation plans to ensure that they are comprehensive; a list of elements that should be included in a thorough plan can be found in your full report for this module.

- Consider the value of requiring ID badges for all visitors. Explore affordable options and possible barriers to implementation. Solicit input from staff prior to implementing a new badge policy.

Human Resources and Employment Practices

This section of your executive summary notes priority recommendations based on your answers to the questions in the Human Resources and Employment Practices module.

Financial Reporting and Internal Controls

- See your full report for suggestions to improve financial reporting. Remember to also review Category 8 (Financial Operations and Oversight) of the COE Developed CSBG Organizational Standards to make sure that your team fully understands these expectations for community action agencies. As indicated in the narrative introduction, "The fiscal bottom line of Community Action is not isolated from the mission, it is a joint consideration."

- See your full report for suggestions to improve financial reporting. Remember to also review Category 8 (Financial Operations and Oversight) of the COE Developed CSBG Organizational Standards to make sure that your team fully understands these expectations for community action agencies. As indicated in the narrative introduction, "The fiscal bottom line of Community Action is not isolated from the mission, it is a joint consideration."

Contracts

This section of your executive summary features priority recommendations related to contracts and your nonprofit's contracting processes.

- Incorporated entities answer for their debts and liabilities. When your agency is asked to indemnify another, you are being asked to agree in advance of an incident to pay for the debts or liability of another party. As a general rule, an organization *receiving* a service should *not agree* to indemnify (or name as an additional insured) the organization *providing* a service.

Client and Participant Safety

This section of your executive summary contains priority recommendations based on your answers to the questions in the Client and Participant Safety module.

- You indicated that your organization does not provide instruction to staff concerning appropriate steps to take in emergency situations. We recommend that you remedy this gap by developing clear steps applicable to a wide array of accidents and incidents. Simple checklists, reminders, or info cards should be shared with staff across the organization.

- We recommend that you update your screening practices to ensure that you are exploring the issue of how applicants would exercise control over clients. Applicants also need to know the organization's guidelines for discipline and control. If the applicant appears to be unwilling -- or unable -- to adapt to the organization's guidelines for exercising control over service recipients, the organization would be well advised not to place the applicant in a position that requires supervising activities for service recipients.

Transportation

This section of your executive summary contains priority recommendations based on your answers to the questions in the Transportation module.

You indicated that your organization provides or sponsors transportation services or owns (or leases) vehicles. The following transportation issues were identified as concerns during the assessment. Look to the full report for details.

- Your organization may be directly or vicariously liable when volunteers or employees operate a vehicle on behalf of your organization. The conditions for each situation and the proper procedures are addressed in the full report.

- Rented, hired or borrowed vehicles can create some of the same exposures as vehicles that are owned by your organization. Be sure that you have policies governing the use of these vehicles and familiarize yourself with the insurance coverage guidelines in your operating area (state, region).

- Driver training is the best opportunity to verfiy the abilities of the people who will operate vehicles. In addition, it is the best way to communicate policies, procedures and expectations about transportation to a captive audience. We recommend instituting a driver training program as soon as possible.

- Remember that cargo is not typically covered under regular vehicle policy. Check with your broker to see if you have the appropriate policy for coverage (usually inland marine coverage).

Technology and Privacy Risk Management

This section of your executive summary contains priority recommendations based on your answers to the questions in the Technology and Privacy Risk Management module.

- We recommend that you adopt a Bring Your Own Device Policy that clarifies what agency information may and must never be accessed on personal devices, including whether employees may access Personally Identifiable Information (PII) on their personal devices.
- It is common practice to require users to change login practice on a regular basis. We recommend that you develop a policy as soon as possible that provides guidelines about the strength of passwords and the frequency of changes.
- We recommend that you consider developing a data classification policy. A template policy is available in *My Risk Management Policies*.
- You indicated that your agency does not have a data breach plan in place. We recommend that you address this gap as soon as possible. See the full report for this module for information on key components in a plan, as well as hyperlinks to NYS and other state breach notification laws.

Special Events

This section of your executive summary contains priority recommendations based on your answers to the questions in the Special Events module.

- Hosting special events may require risk management efforts not normally associated with the normal operations of your organization. Be sure to consider the various components of the event and risks associated with these components. Doing so will help the event be successful and have a positive impact for your organization.
- Documentation is an important part of risk management in all phases of activity. We recommend you begin documenting risk management activities as soon as possible.
- Documentation is critical to clarify expectations when working with other entities. Get agreements in writing when other parties are involved.
- An absence of personnel devoted to security (and other emergency situations) at your event creates a liability for your organization. You should implement appropriate staffing internally or contract the appropriate vendor to provide security.
- Although there may be time and other resource constraints that apply, selection, training, and supervision of 'day of' volunteers for your special event should reflect the magnitude of the risks associated with their use.
- You should be taking the necessary steps to address spectator safety as a part of your event.
- Vehicle operating and insurance concerns need to be addressed if you are transporting event participants yourself or by contracting an outside service.
- You should be using accident or incident forms to create documentation of the event. This documentation helps with review after the accident as well as fostering the ability to prevent similar incidents from happening going forward. Look to the full report for information on what your forms should include.

Crisis Management and Business Continuity Planning

This section of your executive summary contains priority recommendations based on your answers to questions in the Crisis Management and Business Continuity Planning module.

- To increase your confidence with respect to crisis planning, review the gaps in your crisis management plan identified in your full report for this module.

- We recommend that you establish a timetable and appoint a small task force to assemble existing components of business continuity planning into a true BCP.

Volunteer Risk Management

This section of your executive summary offers priority recommendations based on your answers to the questions in the Volunteer Risk Management module.

- You indicated that some, but not all, volunteers undergo an orientation prior to serving. We recommend that you require an onboarding or orientation process for all volunteers. Doing so increases the likelihood that volunteers will serve safely and effectively. In cases where it is difficult or impossible to provide an orientation, closer supervision or periodic in-service training should be provided.

- You indicated that you encourage volunteers to raise concerns but that you do not have a formal process for them to follow. It may be confusing or discouraging to a volunteer who has a complaint but does not know how to resolve it. We suggest establishing a formal process for volunteers to voice concerns with your organization.

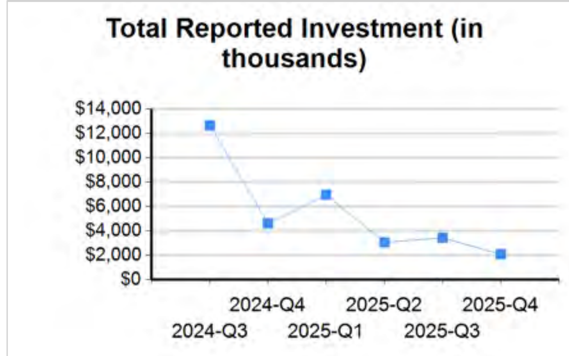
- Conducting exit interviews with departing volunteers offers many benefits. We recommend that you consider conducting exit interviews. See the full report for suggestions on components of an exit interview process as well as questions to include.

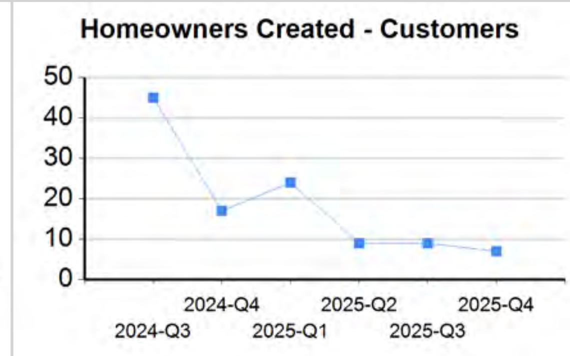
Fundraising and Resource Development

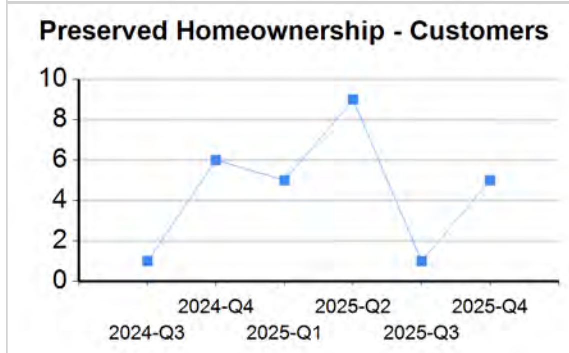
This section of your executive summary contains priority recommendations based on your answers to the questions in the Fundraising and Resource Development module.

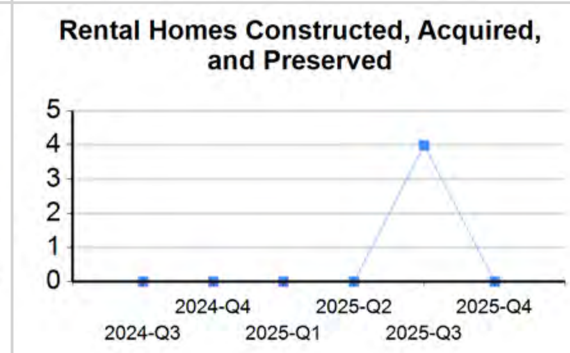
- Planning for the possibility that an individual donor will walk away from your nonprofit is sound risk management. See the report for insight on the reasons some donors walk away, and four tips for reducing the likelihood and potential impact of losing a major individual donor.
- You indicated that your nonprofit does not have practices in place to manage the risk of non-compliance with the CAN-SPAM Act. See the full report for additional information on this federal law, including resource links.
- Nonprofits that have minimal experience with government contracts may be caught off guard and unprepared for some of the risks associated with such funding, including inadequate funding for infrastructure, late payment/reimbursement, and complex reporting requirements. Thoughtfully consider the range of risks and 'what ifs' before you seek any government contract.
- You indicated that your nonprofit has not adopted goals with respect to the diversification of funding sources. Perhaps your agency has a single, highly reliable source of funding. Or your revenue streams have been judged adequately diverse. See the full report for a few risk tips related to the goal of diversifying funding sources.

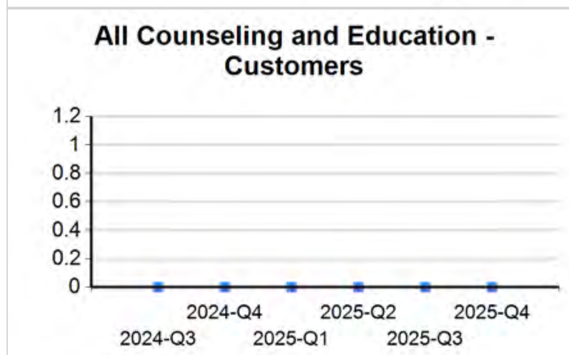
Total Reported Investment	**$2,081,098.79**
Homeowners Created - Customers	7
Preserved Homeownership - Customers	5
Rental Homes Constructed, Acquired, and Preserved	0
Created and Preserved Homes and Customers	**12**
Owner Occupied Repairs - Homes	30
Rental Homes, Repaired	0
Total Repaired - Homes	**30**
Group Education - Customers	0
One-on-one Counseling - Customers	0
One-on-one Counseling - Services	0
Foreclosure Mitigation Counseling, Home Not Retained - Customers	0
All Counseling and Education - Customers	**0**
Foreclosure Mitigation Counseling Intake - Customers	0
Rental Homes Portfolio, Owned and/or Managed	135











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

I. Clients & Financing	Homeowners Created					
	NWO Constructs New Unit for New Home Owner	NWO Sells a Unit it Had Purchased (with or without rehab) to New Home Owner	Directly Provides Self-Help Housing for New Home Owner	Plays Intermediary Role in Providing Self-Help Housing for New Home Owner	Counselor and/or Broker/Lender ONLY for New Home Owner	Total Homeowners Created
Investment	$0.00	$0.00	$0.00	$472,700.00	$1,078,473.56	$1,551,173.56
Homes	0	0	0	2	5	7
Customers	0	0	0	2	5	7

	Preserved Homeownership					
	Owner Occupied Rehab	Refinance not foreclosure	Reverse mortgage	Replacement	Foreclosure Mitigation Counseling (home retained)	Total Preserved Homeownership
Investment	$15,689.23	$0.00	$0.00	$0.00	$0.00	$15,689.23
Homes	5	0	0	0	0	5
Customers	5	0	0	0	0	5

II. Projects & Summary			Rental Homes								
	Owner-Occupied Repairs	For-Sale Homes Developed	Development Services	Constructed and Purchased	Rehabilitated and Refinanced	Repaired	Commercial Development	Commercial Lending	Special Projects	Financial Assistance and Supportive Services	Consumer Lending
Investment	$40,672.00	$472,700.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$864.00	$0.00
Homes	30	* 2	0	0	0	0					

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

Quarterly Production Summary Report

8251 - LIFT Community Action Agency

July 1 - September 30 2025

Midwest Region

III. Rental Homes Portfolio	
a. Owned	135
b. Managed not Owned	0
c. Number of units covered by project-based rental assistance program	0
d. Number of units covered by tenant-based rental assistance program	68

IV. Commercial Development Portfolio	
Number of Projects	0
Square Footage	0

Shared Equity and Cooperative Housing Portfolio	
Community Land Trust	0
Deed-Restricted Homeownership	0
Limited Equity Cooperative	0

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

VI. Counseling Results - Customers

Preserved Homeownership, Foreclosure Mitigation - Customers	
a. Mortgage refinanced	0
b. Brought mortgage current	0
c. Mortgage modified	0
d. Received second mortgage	0
e. Initiated forbearance agreement/repayment plan	0
f. Obtained partial claim loan from FHA lender	0
Preserved Homeownership, Foreclosure Mitigation - Customers (Total)	**0**

Foreclosure Mitigation Counseling, Home Not Retained - Customers	
a. Executed a deed-in-lieu	0
b. Sold property/chose alternative housing solution	0
c. Pre-foreclosure sale	0
d. Mortgage Foreclosed	0
e. Bankruptcy	0
f. Entered debt management	0
g. Counseled and referred for legal assistance	0
h. Other (final result not listed above)	0
Foreclosure Mitigation Counseling, Home Not Retained - Customers (Total)	**0**

Individual Counseling - Services	
a. Homeless Assistance	0
b. Rental Topics	0
c. Pre-purchase/Homebuying	0
d. Non-Delinquency Post-Purchase	0
e. Reverse Mortgage	0
f. Resolving or Preventing Forward Mortgage Delinquency or Default	0
g. Resolving or Preventing Reverse Mortgage Delinquency or Default	0
h. Disaster Preparedness Assistance	0
i. Disaster Recovery Assistance	0
Total Counseling Services	**0**

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

First Mortgages	
a. Total outstanding number of RLF loans	5
b. Total outstanding value RLF loans	$275,066.00
c. Number currently 30-59 days delinquent	0
d. Value currently 30-59 days delinquent	$0.00
e. Number currently 60-89 days delinquent	2
f. Value currently 60-89 days delinquent	$150,567.00
g. Number currently 90 days or more delinquent	0
h. Value currently 90 days or more delinquent	$0.00
i. Delinquency Rate (90 days or more)	0.00 %

Subordinate Mortgages	
j. Total outstanding number of RLF loans	0
k. Total outstanding value of RLF loans	$0.00
l. Number currently 30-59 days delinquent	0
m. Value currently 30-59 days delinquent	$0.00
n. Number currently 60-89 days delinquent	0
o. Value currently 60-89 days delinquent	$0.00
p. Number currently 90 days or more delinquent	0
q. Value currently 90 days or more delinquent	$0.00
i. Delinquency Rate (90 days or more)	0.00 %

Revolving Loan Fund (RLF), Non Amortized	
a. Total number of outstanding non-amortized loans (excluding forgivable)	0
b. Total value of outstanding non-amortized loans (excluding forgivable)	$0.00

IX. Home Ownership Customers: Education and Counseling Hours

0 Hours		>0 and <4 Hours		=>4 and <8 Hours		=>8 Hours	
# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients
0	0	0	0	0	0	7	100.00 %

YTD Production Summary Report

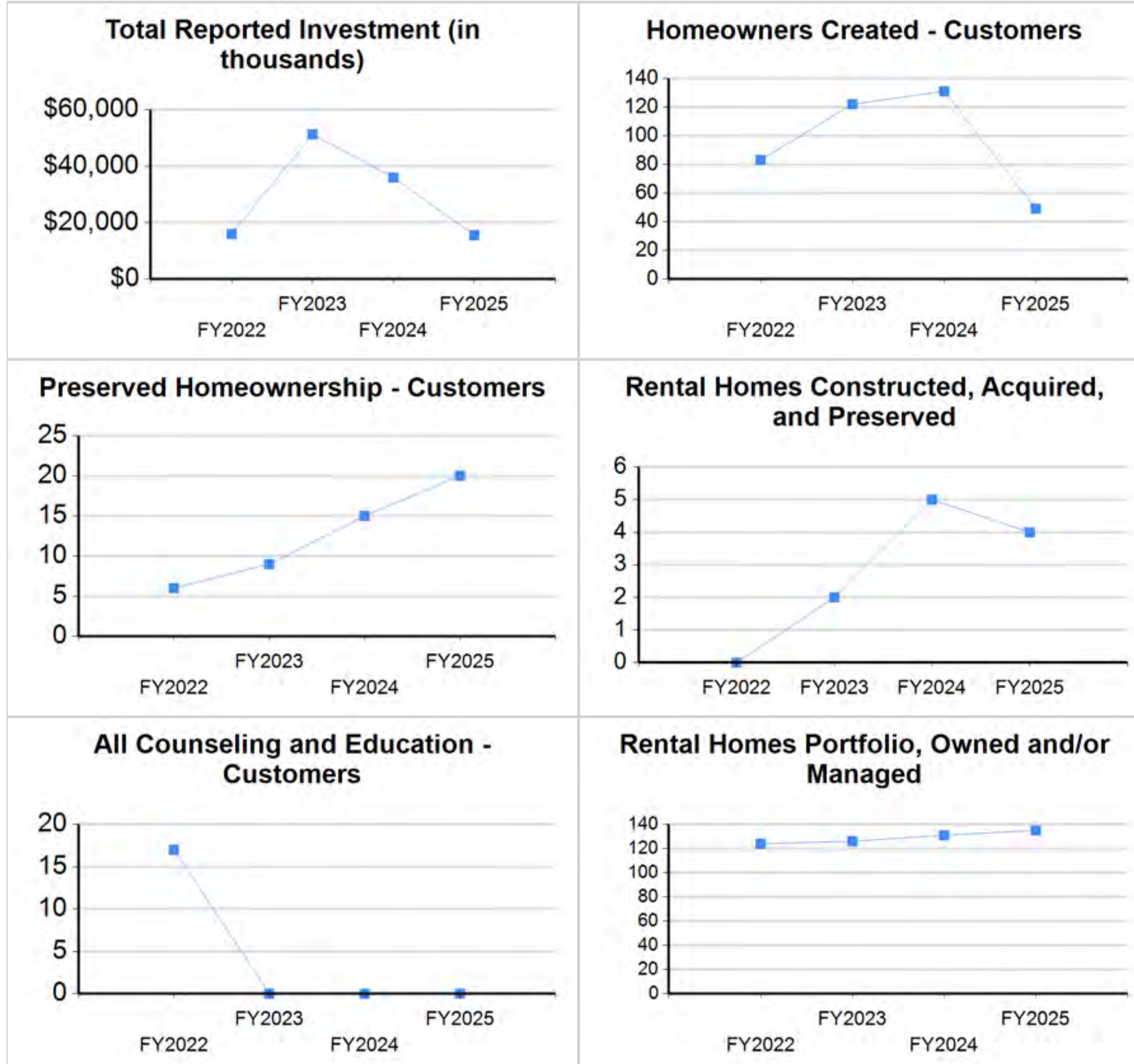
8251 - LIFT Community Action Agency

October 1 - September 30 2025

Midwest Region

Total Reported Investment	**$15,538,834.79**
Homeowners Created - Customers	49
Preserved Homeownership - Customers	20
Rental Homes Constructed, Acquired, and Preserved	4
Created and Preserved Homes and Customers	**73**
Owner Occupied Repairs - Homes	71
Rental Homes, Repaired	0
Total Repaired - Homes	**71**
Group Education - Customers	0
One-on-one Counseling - Customers	0
One-on-one Counseling - Services	0
Foreclosure Mitigation Counseling, Home Not Retained - Customers	0
All Counseling and Education - Customers	**0**
Foreclosure Mitigation Counseling Intake - Customers	0
Rental Homes Portfolio, Owned and/or Managed	135

Production Goals	FY 2024 Projections	FY 2025 Projections
Homeownership Promotion Clients	90	81
Homeownership Preservation Clients	40	12
Rental Units Developed	5	4
Rental Units Preserved	0	0



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

I. Clients & Financing	Homeowners Created					
	NWO Constructs New Unit for New Home Owner	NWO Sells a Unit it Had Purchased (with or without rehab) to New Home Owner	Directly Provides Self-Help Housing for New Home Owner	Plays Intermediary Role in Providing Self-Help Housing for New Home Owner	Counselor and/or Broker/Lender ONLY for New Home Owner	Total Homeowners Created
Investment	$0.00	$0.00	$650,782.01	$2,478,324.00	$8,179,614.24	$11,308,720.25
Homes	0	0	3	13	33	49
Customers	0	0	3	13	33	49

	Preserved Homeownership					
	Owner Occupied Rehab	Refinance not foreclosure	Reverse mortgage	Replacement	Foreclosure Mitigation Counseling (home retained)	Total Preserved Homeownership
Investment	$87,673.54	$0.00	$0.00	$0.00	$0.00	$87,673.54
Homes	20	0	0	0	0	20
Customers	20	0	0	0	0	20

II. Projects & Summary			Rental Homes								
	Owner-Occupied Repairs	For-Sale Homes Developed	Development Services	Constructed and Purchased	Rehabilitated and Refinanced	Repaired	Commercial Development	Commercial Lending	Special Projects	Financial Assistance and Supportive Services	Consumer Lending
Investment	$93,083.00	$3,197,897.00	$0.00	$767,000.00	$0.00	$0.00	$0.00	$68,678.00	$0.00	$15,783.00	$0.00
Homes	71	* 17	0	4	0	0					

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

III. Rental Homes Portfolio	
a. Owned	135
b. Managed not Owned	0
c. Number of units covered by project-based rental assistance program	0
d. Number of units covered by tenant-based rental assistance program	68

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

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

VI. Counseling Results - Customers

Preserved Homeownership, Foreclosure Mitigation - Customers	
a. Mortgage refinanced	0
b. Brought mortgage current	0
c. Mortgage modified	0
d. Received second mortgage	0
e. Initiated forbearance agreement/repayment plan	0
f. Obtained partial claim loan from FHA lender	0
Preserved Homeownership, Foreclosure Mitigation - Customers (Total)	**0**

Foreclosure Mitigation Counseling, Home Not Retained - Customers	
a. Executed a deed-in-lieu	0
b. Sold property/chose alternative housing solution	0
c. Pre-foreclosure sale	0
d. Mortgage Foreclosed	0
e. Bankruptcy	0
f. Entered debt management	0
g. Counseled and referred for legal assistance	0
h. Other (final result not listed above)	0
Foreclosure Mitigation Counseling, Home Not Retained - Customers (Total)	**0**

Individual Counseling - Services	
a. Homeless Assistance	0
b. Rental Topics	0
c. Pre-purchase/Homebuying	0
d. Non-Delinquency Post-Purchase	0
e. Reverse Mortgage	0
f. Resolving or Preventing Forward Mortgage Delinquency or Default	0
g. Resolving or Preventing Reverse Mortgage Delinquency or Default	0
h. Disaster Preparedness Assistance	0
i. Disaster Recovery Assistance	0
Total Counseling Services	**0**

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

First Mortgages	
a. Total outstanding number of RLF loans	5
b. Total outstanding value RLF loans	$275,066.00
c. Number currently 30-59 days delinquent	0
d. Value currently 30-59 days delinquent	$0.00
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f. Value currently 60-89 days delinquent	$150,567.00
g. Number currently 90 days or more delinquent	0
h. Value currently 90 days or more delinquent	$0.00
i. Delinquency Rate (90 days or more)	0.00 %

Subordinate Mortgages	
j. Total outstanding number of RLF loans	0
k. Total outstanding value of RLF loans	$0.00
l. Number currently 30-59 days delinquent	0
m. Value currently 30-59 days delinquent	$0.00
n. Number currently 60-89 days delinquent	0
o. Value currently 60-89 days delinquent	$0.00
p. Number currently 90 days or more delinquent	0
q. Value currently 90 days or more delinquent	$0.00
i. Delinquency Rate (90 days or more)	0.00 %

Revolving Loan Fund (RLF), Non Amortized	
a. Total number of outstanding non-amortized loans (excluding forgivable)	0
b. Total value of outstanding non-amortized loans (excluding forgivable)	$0.00

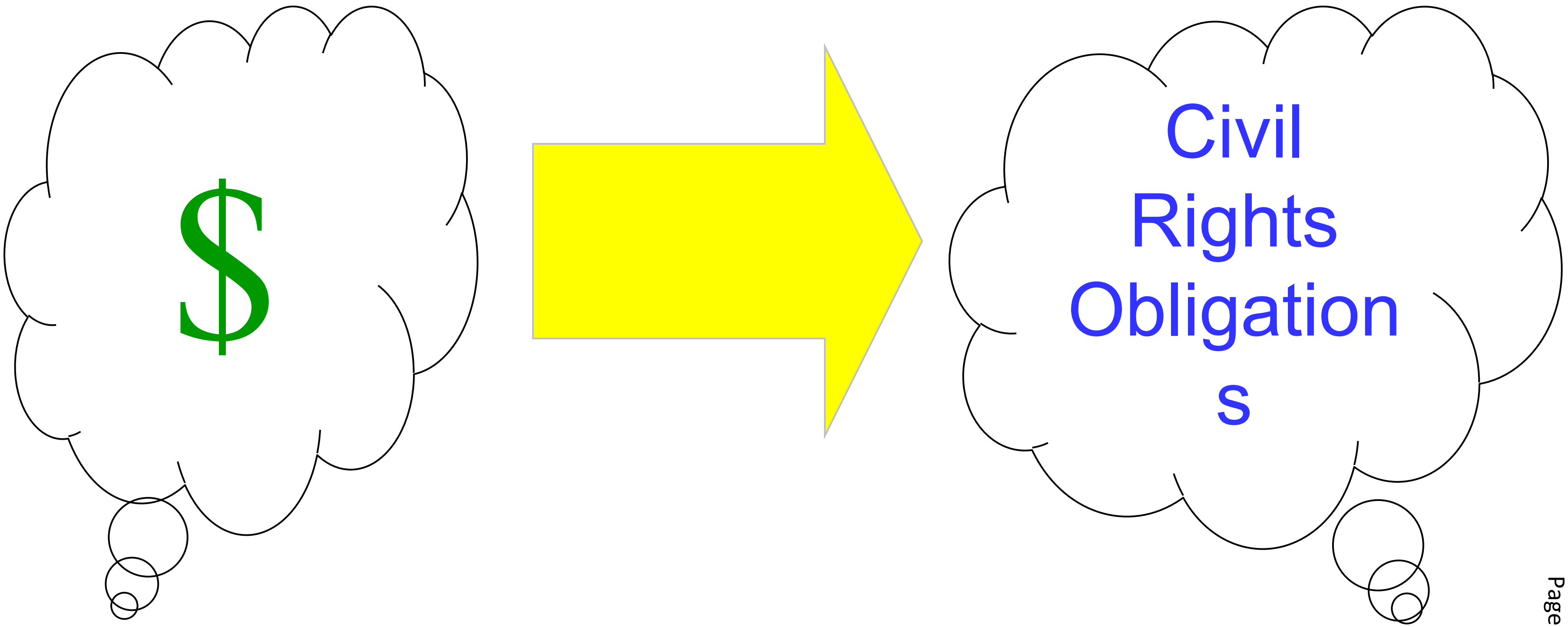
VIII. Inventory For-Sale / Days on the Market

Inventory For-Sale Homes	
Number of unimproved owned buildings	1
Number of owned undeveloped lots	0
Number of units under construction	0
Number of completed, unsold units held in portfolio	37
Number of for-sale units sold	1
Average days on the market	90

X. Home Ownership Customers: Education and Counseling Hours

0 Hours		>0 and <4 Hours		=>4 and <8 Hours		=>8 Hours	
# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients	# Clients	% Total Clients
0	0	0	0	0	0	49	100.00 %

Office for Civil Rights, Office of Justice Programs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Civil
Rights
Obligation
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The Office for Civil Rights Enforces

- **Title VI of the Civil Rights Act of 1964 (*race, color, national origin*)**
- **Program Statutes (e.g., Safe Streets Act, Victims of Crime Act, Violence Against Women Act, JJDPA) (*race, color, national origin, sex, religion, disability, sexual orientation, and/or gender identity*)**
- **Section 504 of the Rehabilitation Act of 1973 (*disability*)**
- **Title II of the Americans with Disabilities Act of 1990 (*disability*)**
- **Age Discrimination Act of 1975 (*age*)**
- **Title IX of the Education Amendments of 1972 (*sex in education programs*)**

Victims of Crime Act –
Nondiscrimination Provision

No person shall on the ground of race, color, religion, national origin, handicap, or sex
be excluded from participation in,
denied the benefits of,
subjected to discrimination under,
or denied employment in connection with,
any undertaking funded in whole or in part
with sums made available under this chapter.

34 U.S.C. § 20110(e).

Violence Against Women Act Reauthorization Act of 2013

No person in the United States shall, on the basis of **actual or perceived** race, color, religion, national origin, sex, **gender identity,** (as defined in paragraph 249 (c)(4) of title 18, United States Code), **sexual orientation,** or disability be excluded from participation in, be denied the benefits of, or be subjected to dis-crimination under any program or activity funded in whole or in part with funds appropriated for grants, cooperative agreements, and other assistance administered by the Office on Violence Against Women.

https://www.justice.gov/archives/ovw/file/29386/download

Violence Against Women Act Reauthorization Act of 2013 cont.

If sex segregation or sex-specific programming is **necessary to the essential operation of a program,** nothing in this paragraph shall prevent any such program or activity from consideration of an individual's sex. In such circumstances, grantees may meet the requirements of this paragraph by providing **comparable services** to individuals who cannot be provided with the sex-segregated or sex-specific programming.

34 U.S.C. 12291(b)(13)

Violence Against Women Act Reauthorization Act of 2013 cont.

- **Sex-Segregated Programming**
  - When males and females receives services in separate settings
- **Sex-Specific Programming**
  - When a recipient designs programming differently for males and females

Beneficiaries choose the appropriate program based upon gender identity.

Violence Against Women Act Reauthorization Act of 2013 cont.

- **Necessary to the Essential Operation of a Program**
  - Fact-specific inquiry, consider:
    - Nature of the service
    - Consequences to beneficiaries of making sex-segregated or sex-specific
    - Literature on efficacy
    - Impact on transgender clients

Reasons may not be trivial, based solely on convenience, or rooted in stereotypes

Violence Against Women Act Reauthorization Act of 2013 cont.

- Fact-specific inquiry, consider:
  - Nature, quality, and duration of the service
  - Relative benefits of different therapeutic modalities
  - Geographic location

Violence Against Women Act Reauthorization Act of 2013 cont.

- **What is Gender Identity?**

- "Actual or perceived gender-related characteristics" (from Matthew Shepard-James Bird Hate Crimes Prevention Act)

- A person's internal view of the individual's gender

- May or may not correspond to sex assigned at birth

- Transgender, male, and female are examples of gender identities

Violence Against Women Act Reauthorization Act of 2013 cont.

Serving Transgender Clients

- Assign clients to service which corresponds to the gender with which the client identifies
- Consider transgender victim's health and safety in making housing assignments
- Transgender client's own views regarding personal safety deserve serious consideration
- Do not isolate or segregate
- Do not make burdensome demands for identity documents
- Do not inquire into surgery or other medical interventions

Who is subject to these laws?

- Any “PROGRAM OR ACTIVITY” that receives financial assistance from the DOJ.
- Program or Activity means all of the operations of an organization receiving federal financial assistance, such as the entire department or office within a state or local government.
- Examples:
  - If a state Department of Public Safety receives federal funding and subawards the funding to local community based organizations, all of the operations of the Department of Public Safety are covered, along with the operations of the local community based organizations.
  - If a victim service agency receives federal funds and uses the funds to operate particular programs, all of the activities of the center are covered, and not just the federally-funded programs.
  - If a project of a county sheriff’s department receives federal funds, the entire sheriff’s department is covered, but not the other departments in the county.

Protected Classes

Race
Color
National Origin
Religion
Sex
Disability
Age
Sexual Orientation
Gender Identity

The statutes that the OCR enforce prohibit discrimination in:

- Employment Practices
- Delivery of Services

Examples of discrimination in the delivery of services

- A funded domestic violence clinic has a blanket policy of only providing services to female victims of domestic violence, and not male victims
- A law enforcement agency fails to take steps to ensure effective communication with a deaf individual during an interrogation.
- A culturally-based sexual assault services program that is primarily designed to provide services to Hispanic individuals turns away a non-Hispanic individual seeking services.

Disability

- Section 504 of the Rehabilitation Act of 1973 prohibits discrimination on the basis of disability by recipients of federal funding.

- Title II of the Americans with Disabilities Act of 1990 prohibits discrimination on the basis of disability and applies to public entities, whether or not they receive federal funding.

- American with Disabilities Act Amendment Act of 2008 is an act to “restore the intent and protections of the ADA of 1990.” Congress found that definition of handicapped individual had not been interpreted consistently with Section 504.

Under Section 504 and Title II of the ADA:

Handicapped person means any person who

- **has a physical or mental impairment which substantially limits one or more major life activities**
- **has a record of such an impairment, or**
- **is regarded as having such an impairment**

Disability Discrimination Analysis

- DOJ funding recipients must provide reasonable accommodations to the known physical or mental limitations of an otherwise qualified individual with a disability unless a recipient can demonstrate it would be an undue hardship or would fundamentally alter the service or activity.
- Every case requires individualized analysis – individuals with disabilities are not a homogenous group even those with the same disability.

Example:

- A shelter for abuse victims receives federal funds.
- The shelter has a blanket policy that residents can not be taking any prescribed psychotropic medication while staying at the shelter.
- **IS THIS AN ACCEPTABLE POLICY?**

Answer:

- NO!
- By having a blanket exclusionary policy, the shelter has discriminated against individuals who may have a mental disability that may be controlled by medication.
- An individualized assessment must be done of the resident.

Section 504 of the Rehabilitation Act of 1973

A recipient with 50 or more employees and receiving Federal financial assistance from the Justice Department of $25,000 or more must

- **designate a Section 504 compliance coordinator**
- **adopt grievance procedures**
- **notify program participants, beneficiaries, applicants, employees, unions, organizations with collective bargaining agreements, that recipient does not discriminate on the basis of disability**

Religion

Definitions

All aspects of religious practice as well as belief

42 USC § 2000e(j)

Includes sincerely held moral or ethical beliefs

29 CFR § 1605.1

FAITH-BASED ORGANIZATIONS (FBOs)

- Government agencies must remove barriers for FBOs applying for aid
- Government agencies providing financial assistance must not discriminate either in favor of or against FBOs

DOJ Regulations issued for FBO guidance 28 C.F.R. pt. 38

- FBOs must not use direct federal funding to engage in <u>explicitly religious activities</u>
  - Explicitly religious activities must be separate in time or location from federally-funded activities, and must be voluntary for those participating in the federally-funded activities.
- FBOs may not discriminate against <u>beneficiaries</u> based on religion, a religious belief, a refusal to hold a religious belief, or a refusal to participate in a religious practice.

FBO Regulations and Employment

Funded FBOs do not forfeit Title VII's exemption from religious discrimination in employment.

"Some Department programs, however, contain independent statutory provisions requiring that all grantees agree not to discriminate in employment on the basis of religion. Accordingly, subgrantees should consult with the appropriate Department program office to determine the scope of any applicable requirements."

28 CFR 38.5(e)

Certificate of Exemption

- DOJ has determined that on a case-by-case basis, the Religious Freedom Restoration Act may allow subgrantee FBOs to hire based on religion. An FBO must certify:
- It will offer all federally-funded services to all qualified beneficiaries
- Explicitly religious activities will be voluntary and kept separate from federally-funded activities; and
- It is a religious organization that sincerely believes that abandoning its religious hiring practice in order to receive federal funding would substantially burden its religious exercise.

Requirements for FBOs

FBOs must give written notice to beneficiaries and prospective beneficiaries that:

- FBO will not discriminate on the basis of religion, a religious belief, a refusal to hold a religious belief, or a refusal to participate in a religious practice;
- FBO may not require beneficiaries to participate in any religious activities;
- FBO will separate in time and location any privately funded religious activities from federally funded activities; and

Requirements for FBOs (cont.)

- If a beneficiary objects to the religious character of the FBO, the FBO will undertake reasonable efforts to identify and refer the beneficiary to an alternative provider that is acceptable to the beneficiary.
- Alternative provider must be in reasonable geographical proximity to the FBO and offer services comparable in substance and quality.
- FBO must maintain a record of the referral. If the FBO is unable to identify an alternative provider, it shall notify the SAA or the DOJ.

New Notice and Referral Requirements for FBOs (cont.)

- FBO must provide this written notice **<u>prior</u>** to the provision of services.
- A sample notice is contained at Appendix A to 28 C.F.R. pt. 38.
- A sample beneficiary referral request is contained at Appendix B to 28 C.F.R. pt. 38.

Are these practices acceptable?

- An atheist participant in a victims of crime support group run by a funded faith-based organization is required to participate in an opening prayer session before the group begins.
- A woman seeking services at a local nonprofic shelter for battered women is not allowed to pray her rosary in her room while she is a resident of the shelter.

NO!

- The first would be an impermissible requirement to participate in religious exercises or program with faith content.

- The second would be denial of access to religious services, pastoral counselor, special dietary needs, or items of a person's faith.

National Origin Discrimination

Includes discrimination on the basis of *Limited English Proficiency* (*LEP*).

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

To avoid discrimination against LEP persons, recipients must

- Take ***reasonable steps*** to ensure ***meaningful access*** to the programs, services, and information the recipients provide, ***free of charge***.

- Establish and implement ***policies and procedures*** for language assistance services that provide LEP persons with meaningful access.

What are reasonable steps?

Four Factor Analysis

1. The ***number or proportion*** of LEP persons served or encountered in the eligible service population.
2. The ***frequency*** with which LEP individuals come in contact with the program.
3. The ***nature and importance*** of the program, activity, or service provided by the program.
4. The ***resources*** available to the recipient.

What are language services?

Provide oral language services

Insure Interpreter Competency

Usually family members, friends, and uncertified co-workers are not appropriate, particularly judicial proceedings.

and

Provide translation of written materials

Safe Harbor Provision

If 5% or 1,000 (whichever is less) of population is LEP, VITAL documents must be translated

However, if 5% represents fewer than 50, then written notice of free written translation upon request must be provided).

What is Meaningful Access?

A prosecutor’s office requires that a Korean-speaking LEP victim of abuse bring her own interpreter to all appointments with the office.

Have this person been afforded meaningful access?

What is Meaningful Access?

No.

This is a failure of the organization to fulfill its obligation to provide a qualified interpreter for the LEP individual at no cost.

What should a written LEP Policy have?

Five Elements

- A process for identifying LEP persons who need language assistance
- Information about the available language assistance measures
- Training for staff
- Notice to LEP persons
- Monitoring and updating the LEP policy

No Retaliation

On what bases do recipients have to comply with the laws?

- Statute
- Contract
- Regulation

Contract - Assurances

The applicant certifies that:

The applicant understand that the federal statutes and regulations applicable to the award (if any) made by the Department based on the application specifically include the statutes and regulations pertaining to civil rights and nondiscrimination, and, in addition –

(a) the Applicant understands that the applicable statutes pertaining to civil rights will include section 601 of the Civil Rights Act of 1964 (42 U.S.C. § 2000d); section 504 of the Rehabilitation Act of 1973 (29 U.S.C. § 794); section 901 of the Education Amendments of 1972(20 U.S.C. § 1681); and section 303 of the Age Discrimination Act of 1975 (42 U.S.C. § 6102);

Contract – Assurances continued

(b) the Applicant understands that the applicable statutes pertaining to nondiscrimination may include section 809(c) of Title I of the Omnibus Crime Control and Safe Streets Act of 1968 (34 U.S.C. § 10228(c)); section 1407(e) of the Victims of Crime Act of 1984(34 U.S.C. § 20110(e)); section 299A(b) of the Juvenile Justice and Delinquency Prevention Act of 2002 (34 U.S.C. § 11182(b)); and that the grant condition set out at section 40002(b)(13) of the Violence Against Women Act (34 U.S.C. § 12291(b)(13)), which will apply to all awards made by the Office on Violence Against Women, also may apply to an award made otherwise;

Contract – Assurances continued

(c)the Applicant understands that it must require any subgrantee to comply with all such applicable statutes (and associated regulations); and

(d)on behalf of the Applicant, I make the specific assurances set out in 28 C.F.R. §§ 42.105 and 42.204.

Regulation

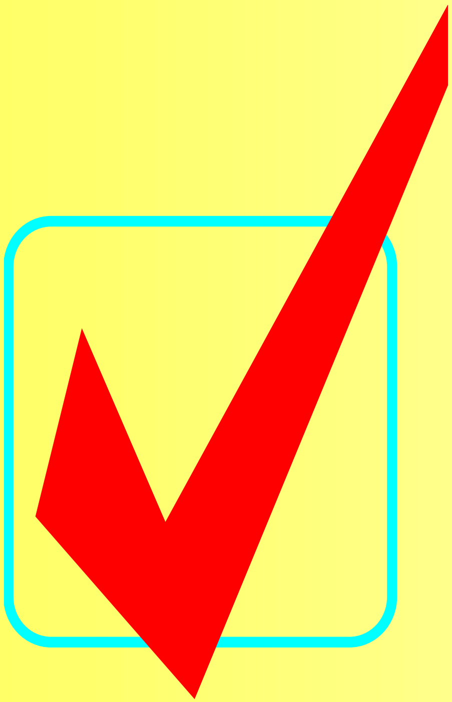
- In the event a Federal or State court or Federal or State administrative agency makes a **FINDING OF DISCRIMINATION** after a due process hearing on the ground of race, color, religion, national origin, disability, sexual orientation, gender identity, or sex against a recipient of funds, the recipient will forward a copy of the finding to the Office for Civil Rights, Office of Justice Programs.
- The recipient will provide an **EQUAL EMPLOYMENT OPPORTUNITY PLAN** if required to maintain one, where the application is for $25,000 or more.

28 C.F. R. pt. 42, subpts. D, E.

OJP's Civil Rights Enforcement

- **EEOPs** (Equal Employment Opportunity Plans)
- **Complaints**
- **Findings**
- **Compliance Reviews**

What is an EEOP?



- **Comprehensive document which analyzes:**
  - **an agency's workforce in comparison to its relevant labor market data**
  - **all agency employment practices to determine their impact on the basis of race, sex, or national origin**
- **A tool used to identify possible problem areas where discrimination may be occurring**

Does an agency have to prepare an EEOP?

Depends on . . .

- Funding (Safe Streets Act, VOCA, VAWA, or JJDPA)
- Status of Organization (*e.g.*, nonprofit)
- Amount of single award
- Number of employees

If / Then	Does the recipient need to submit a Certification Form to OCR?	Does the recipient need to develop an EEOP?	Must the recipient submit an EEOP Utilization Report to OCR?
Recipient is a Medical or Educational Institution, Indian Tribe, or Nonprofit	YES	NO	NO
Largest individual grant received is less than $25,000	YES	NO	NO
Recipient has less than 50 employees	YES	NO	NO
None of the above	YES	YES	YES

Prepare and Submit EEOP and Certification at https://ojp.gov/about/ocr/eeop.htm

Subgrantee Civil Rights Obligations

Subgrantees must comply with civil rights laws including:

- Completing an EEOP Certification Form and submitting this form and EEOP (if required) to the OCR.
- providing notification to employees and beneficiaries that the agency does not discriminate and that employees and beneficiaries have a right to file a complaint with the DAC or the DOJ Office of Civil Rights.
- having a Section 504 Coordinator if it meets the employee and funding threshold.
- providing meaningful access to their services to LEP individuals.
- complying with the regulations relating to FBOs (28 C.F.R. pt. 38).
- Having written procedures for receiving and processing discrimination complaints from employees and beneficiaries of the services the agency provides

Resources

- **Preparing and EEOP** Step-by-step instructions for preparing an EEOP Short Form online at https://ojp.gov/about/ocr/eeop.htm
- **LEP Information**: www.lep.gov – Tips and tools for different types of agencies on how to comply with requirements to provide services to LEP persons.
- **Disability Information:** www.ada.gov – Disability Rights Section of DOJ's Civil Rights Division has many resources to assist recipients in understanding the requirements of the ADA
- **OCR Online Training:** https://ojp.usdoj.gov/about/ocr/assistance.htm - OCR has posted training presentations on our website addressing a variety of civil rights topics

Office for Civil Rights

(202) 307-0690
TTY (202) 307-2027

www.ojp.usdoj.gov/ocr

Q & A

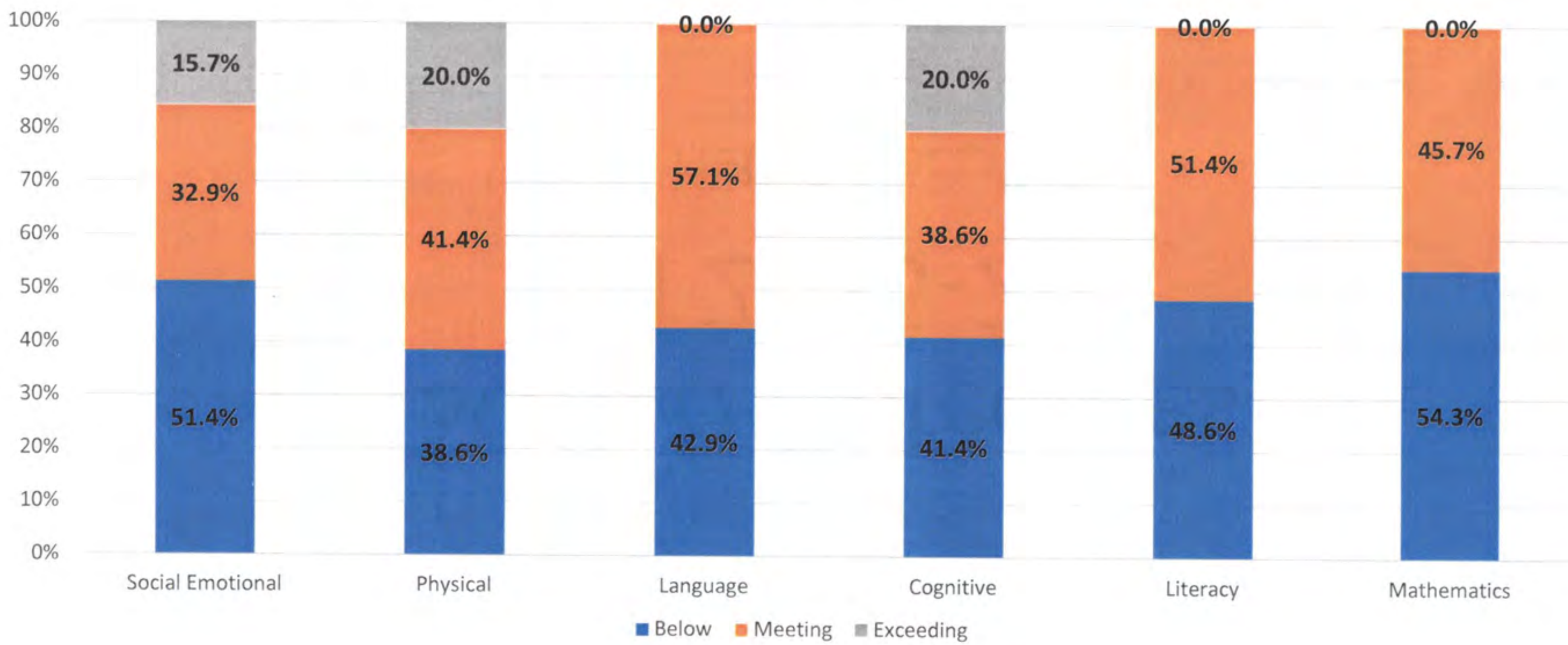
Self-Assessment

- What was one highlight from today's presentation on the application of civil rights laws to recipients of Federal financial assistance?
- What is one new piece of information that you will take back with you to your work?

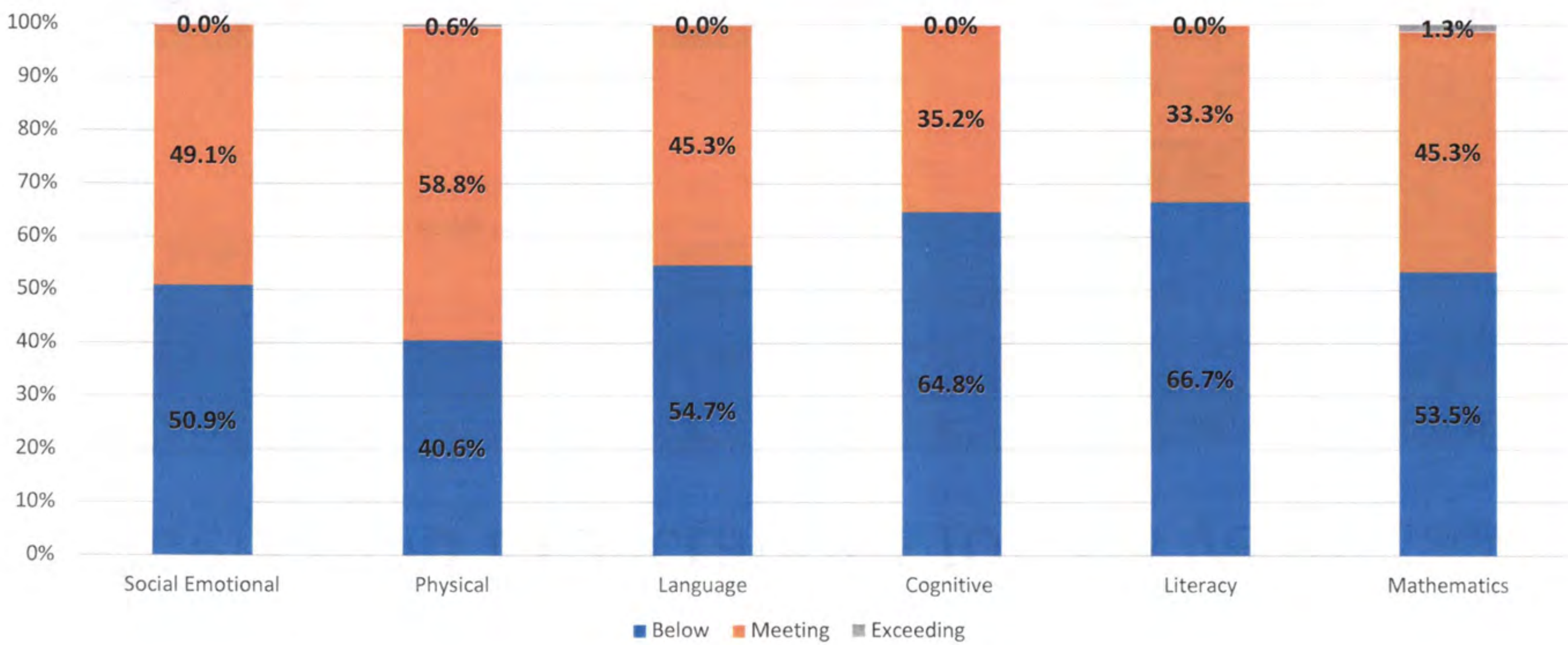
TSGOLD Outcomes
Fall 2025-26

Widely Held Expectations

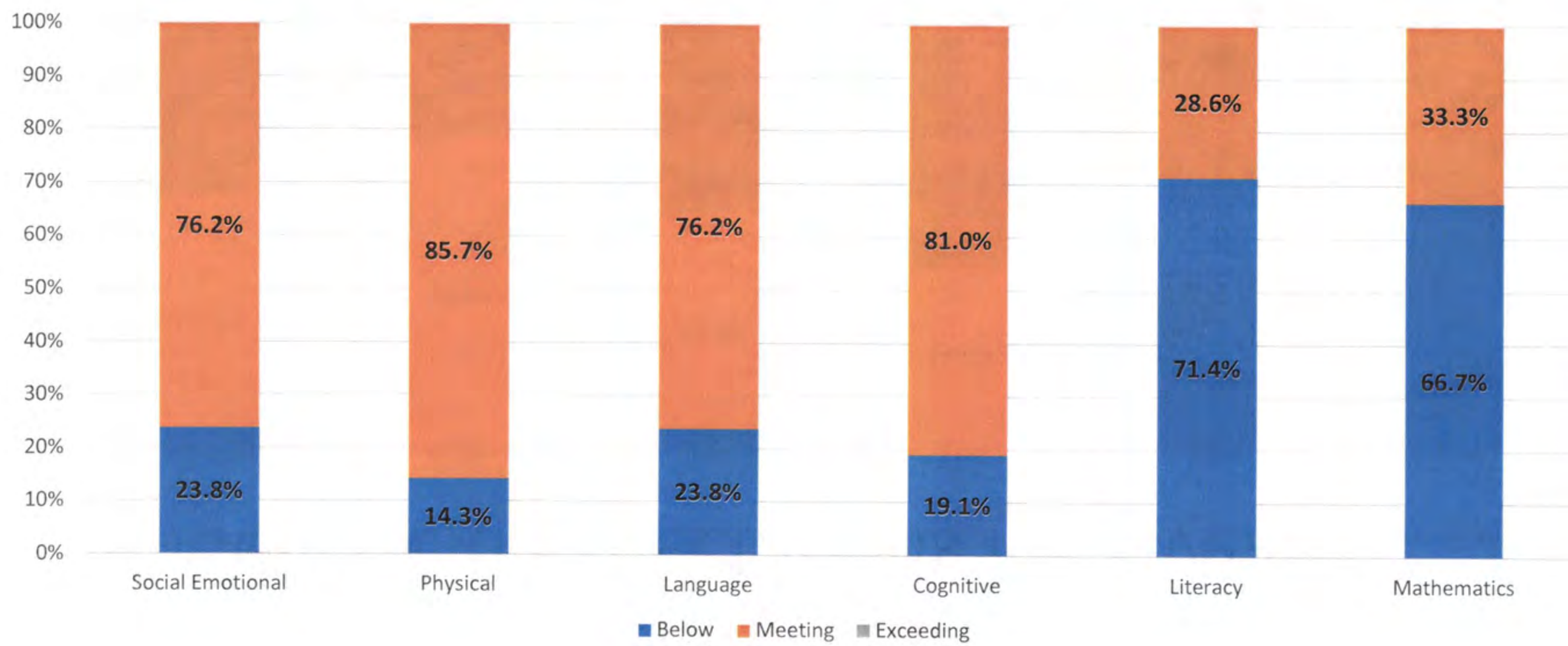
Head Start
Widely Held Expectations for 4 years (70)



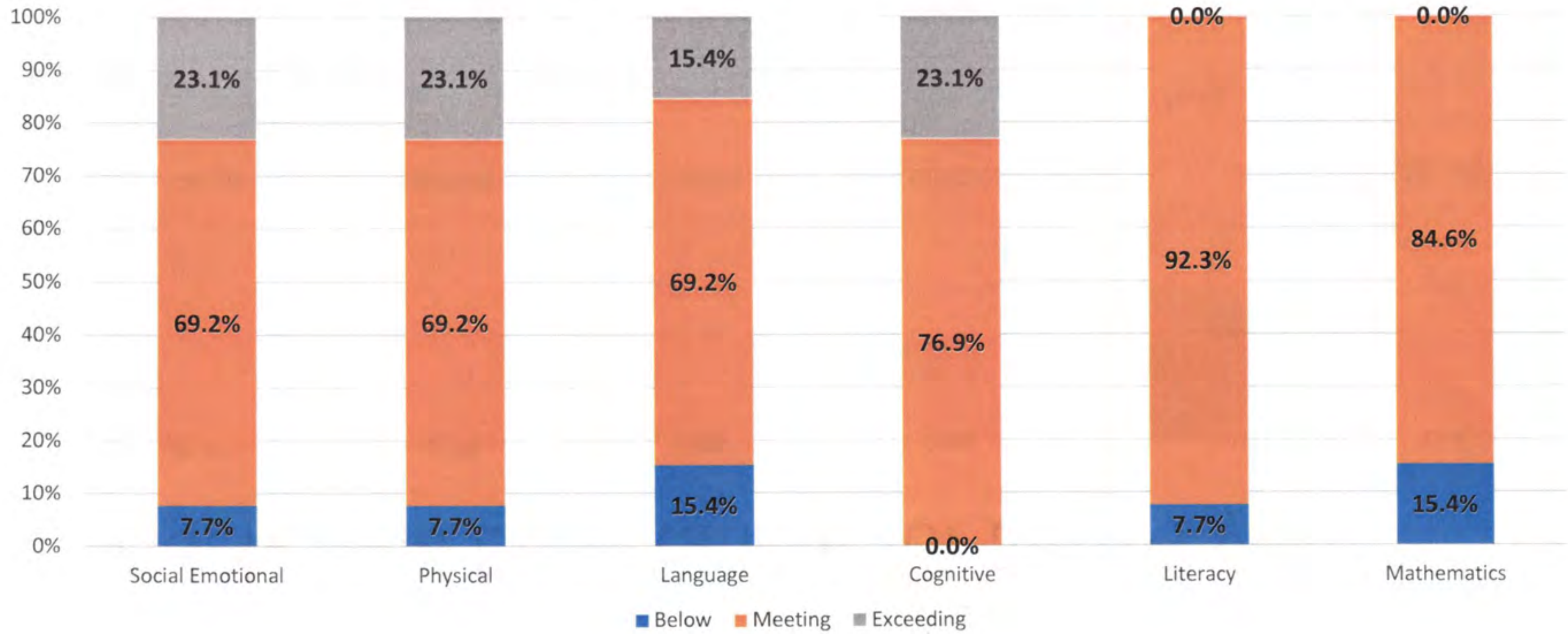
Head Start
Widely Held Expectations for 3 years (159 children)



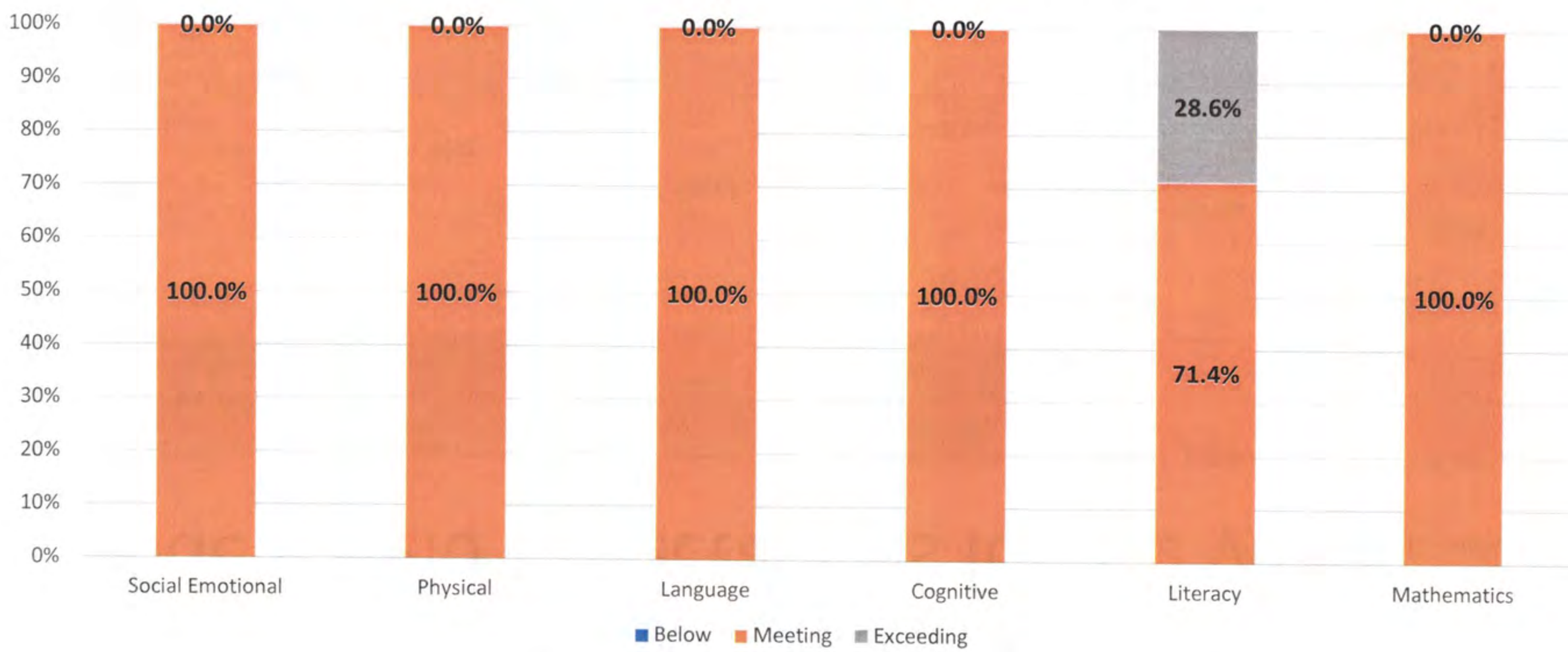
Early Head Start
Widely Held Expectations for 2-3 years (21 children)



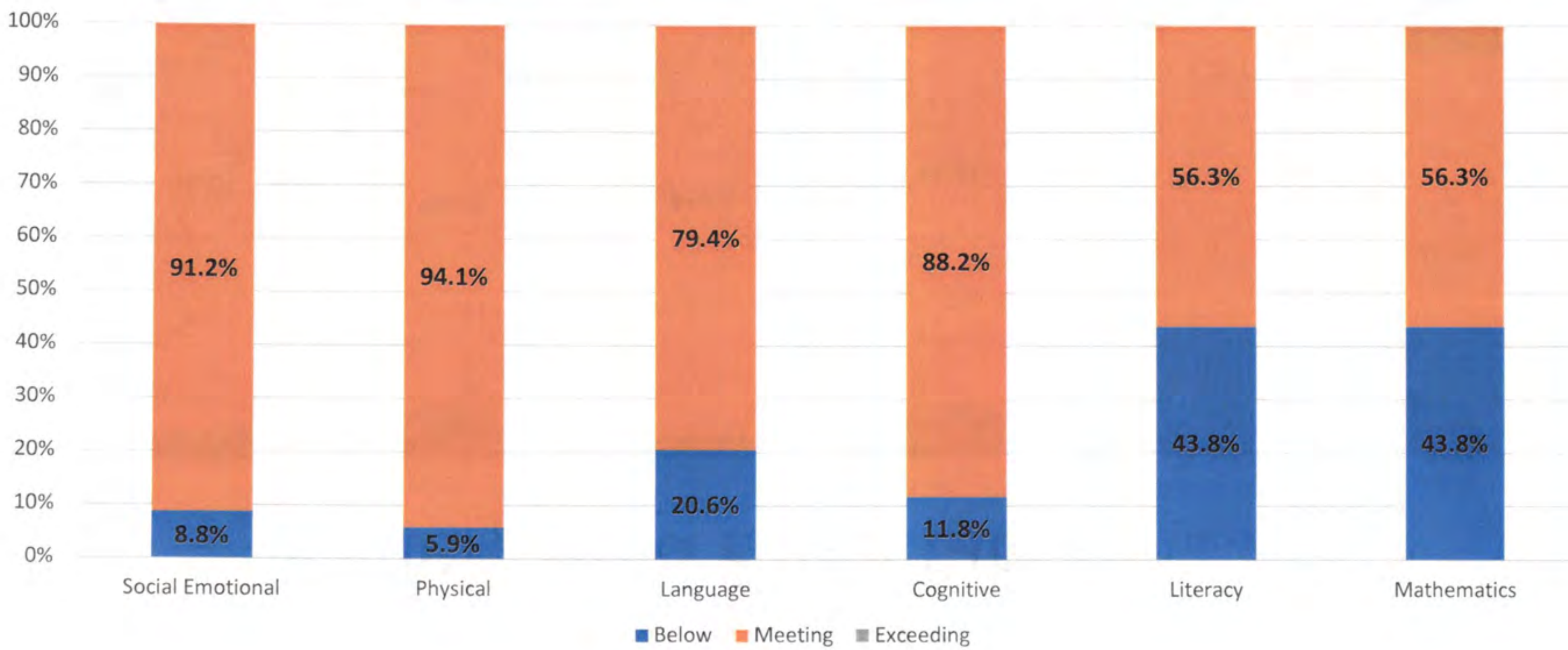
Early Head Start
Widely Held Expectations for 1-2 years (13 children)



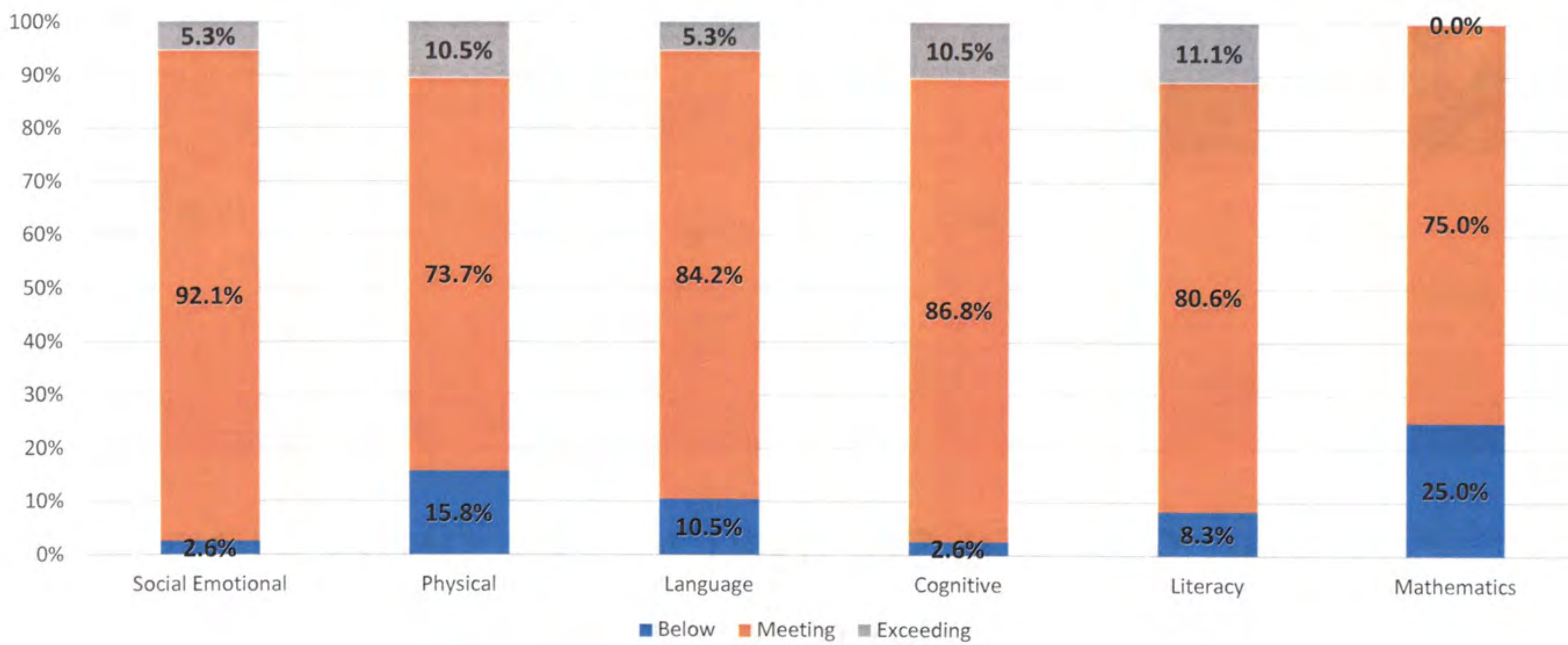
Early Head Start
Widely Held Expectations for Birth-1 years (7 children)



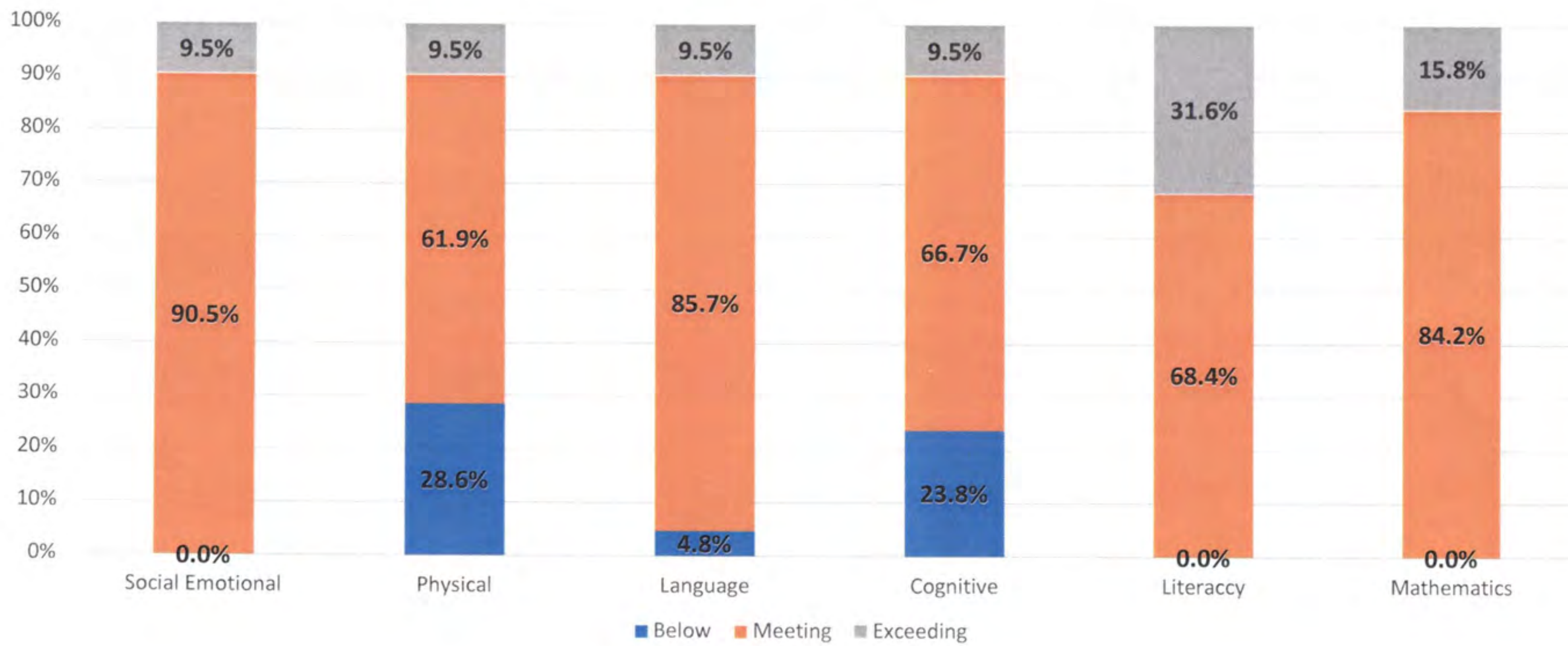
Early Head Start-Child Care
Widely Held Expectations for 2-3 years (34 children)



Early Head Start-Child Care 1-2 years Widely Held Expectations (38 children)



Early Head Start-Child Care Birth-1 years Widely Held Expectations (21 children)



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Hugo and Idabel Oklahoma

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

October 21, 2025
MINUTES

LIFT Community Action Agency's Head Start/Early Head Start/EHS-CC Policy Council met on Tuesday, October 21, 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 10:32 a.m. by Darla Galyon, HS/EHS/EHS-CC Director. A quorum was established. Members present: Keri Smith; Antlers HS, Heather Ainsworth; Boswell I, Steve Woldanski; Boswell II, Crystal Barrick; Broken Bow I, Travi Anna Wright; Horace Mann III, Destiny Morgan; Hugo EHS, Brandi Hobbs; Idabel I, Lasha Miller; Soper I, Hailey Ensey; Soper II, Bessi Black and Clinton Crawley; Community Representatives.

Guest present: Susan Ware; Hugo II grandparent.

HS/EHS/EHS-CC staff present included: Darla Galyon; HS/EHS/EHS-CC Director, Jordan Mack; HS/EHS/EHS-CC Assistant Director, Mattie McKee; EHS-CC Assistant Director, Lori Henry; HS/EHS/EHS-CC Secretary, Ronda Spear; Health Assistant Specialist, Lauren Barger; Nutrition Specialist, Susie Mashburn; Education Specialist, Sara Moore; Professional Development Specialist, Brittany Bailey; ERSEA Specialist, Christina Merritt; Family/Community Engagement Specialist, and Tori Williams; Health Specialist.

Consideration and Possible Action to Accept the minutes from the September 16, 2025 meeting. Copies of the minutes were provided to the council for review. Bessi Black made a motion to accept the minutes as presented, Keri Smith seconded, all voted in favor, motion passed.

Nomination and Election of Policy Council Vice-Chairman for the 2025-2026 School Year: Darla Galyon , HS/EHS/EHS-CC Director explained that the previous chairman had moved out of the are and then explained the roles and responsibilities of the position and then asked for nominations/volunteers: Bessi Black volunteered and with there being no other volunteers/nominations, Steve Woldanski made a motion to approve and Heather Ainsworth seconded the motion, all voted in favor, motion passed.

Consideration and Possible Action to Enter into Executive Session to Discuss the Employment, Transfer, Hiring, Appointment, Promotion, Demotion or Disciplining of employees: Kaitlin Cooper-Antlers EHS Caregiver; Katijo Ripley-Antlers HS Special Needs Aide; Jacy Eaves- Soper HS Special Needs Aide; C'Miya Williams- Boswell HS Special Needs Aide, 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 Heather Ainsworth, all voted in favor, motion passed.

Consideration and Possible Action to Approve the Acceptance of the Preschool Development Grant Birth Through Five Parent and Family Engagement Award from Oklahoma Partnership for School Readiness foundation, Inc.- $52,500: Darla Galyon , HS/EHS/EHS-CC Director explained that through this project, the Family Resource Center will distribute Developmental Skill Building Kits for children and parent kits for caregivers during three community events- in each of our service counties: Choctaw, McCurtain and Pushmataha. These events will strengthen family engagement by providing families with practical resources and meaningful connections to services. The children kits will include educational toys such as staking blocks, shape sorters, puzzles and lacing beads. The parent kits will include parenting resource booklets on child development and positive parenting practices, local resource directories to strengthen access to services, tools to support daily routines. Together, these kits and evens will provide a structured, accessible, and engaging way for families to access, understand, and interact with early childhood resources. Heather Ainsworth made a motion to approve and Lasha Miller seconded, all voted in favor, motion passed.

Strategies to Reduce Food Insecurity Pilot Project Contract Award for Oklahoma State Department of Health- $20,000: Darla Galyon , HS/EHS/EHS-CC Director stated that this project designed to both alleviate immediate food insecurity and promote long term nutrition well-being for families with children under the age of 12. Through a coordinate suite of services- including a Weekend Backpack Food Program, quarterly Family Cooking and Nutrition Classes, Mobile Food Market events, and onsite food access at the Family Resource Center- LIFT CAA will expand food access, build nutrition knowledge and skills, and strengthen family resilience. These services will be managed by existin Family Resource Center Staff with strong community ties and experience in outreach, case management, and program coordination.

Consideration and Possible Action to Approve Head Start/Early Head Start/EHS-Child Care Policy Council Operating Procedures and Conflict Resolution/Impasse Policy: Jordan Mack, HS/EHS/EHS-CC Assistant Director provided copies and reviewed with the Policy Council the Operating Procedures; the purpose is serving as a link to parents, grantees, public and private organizations and the communities served; the membership, as representatives of Head Start families and as community representatives; offices duties, including Chairperson, Vice-Chairperson, and Secretary; committees, such as Parent Committees, Grievance Committees, and special committees as needed. Jordan Mack also explained that the Impasse Policy is a conflict resolution policy between the Policy Council and the Governing Board.

Consideration and Possible Action to Approve LIFT Head Start Policy Council Regular Meeting Dates for 2025-2026: Darla Galyon; HS/EHS/EHS-CC Director explained to the council that the LIFT Governing Board meets on the 2nd Tuesday of each month, and that HS/EHS/EHS-CC Policy Council has always met the following Tuesday (3rd Tuesday) of each month. A copy of the meeting dates was provided. After reviewing and discussing the 2025-2026 Calendars a motion was made by Steve Woldanski and seconded by Lasha Miller, all voted in favor and the motion passed.

Consideration and Possible Action to accept HS, EHS, EHS-CC, SAF, OECP, USDA, and Non-Fed August, 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. Lasha Miller made a motion to accept, seconded by Travi Anna Wright, all voted in favor, motion passed.

Presentation of September, 2025 Financial Statements and Credit Card Distribution Reports: Darla Galyon, HS/EHS/EHS-CC Director presented the September, 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 November 18, 2025 meeting.

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

Other Reports/Announcements:

Recruitment & Enrollment Update/Enrollment and Attendance Report-Brittany Bailey, ERSEA Specialist: Brittany Bailey reported that as of today, 10/21/2025, that 227 children are currently enrolled in Head Start for the 2025-2026 School Year and attendance was 93.5%. Recruitment is an ongoing process and are still be accepted and processed. Early Head Start currently has 42 children enrolled and attendance was 88.8%. Early Head Start-CC currently has 96 children enrolled and attendance was 89.00%.

USDA Meals and Snack Report-Lauren Barger: Lauren Barger, Nutrition Specialist provided a copy and an overview summary of meals and snacks served for September, 2025.

Governing Board Report: Mattie McKee- Mattie McKee reported the Governing Board met on October 14, 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.

P**rogram Summary Report-Darla Galyon** presented the HS/EHS/EHS-CC Program Summary for the council to review.

Family Resource Center Update-Ashley Gaddy-The Family Resource Center provided a comprehensive monthly update that covers a range of key areas including training initiatives, client intakes, and upcoming projects and events. These updates serve as a valuable communication tool to keep parents and partners informed and engaged. In addition to logistical and operational highlights, the center emphasizes parent engagement by sharing opportunities for families to participate in programs and activities. The FRC offers guidance on how community members can get involved, fostering an environment that supports family well-being and community collaboration.

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):

Darla Galyon , HS/EHS/EHS-CC Director explained the roles and responsibility of the Policy Council Rep serving as a Governing Board Liaison. Shade Dill volunteered to be the Policy Council Liaison to the Governing Board and with there be no other nominations/volunteers, Lasha Miller made a motion to approve and Heather Ainsworth seconded the motion, all voted in favor and the motion passed.

There being no other business to come before the board, Lasha Miller made a motion to adjourn and Heather Ainsworth seconded the motion, all voted in favor and the meeting ended at 11:51 a.m.

____

Kylie Wilcox-Chairperson
Bessi Black-Vice-Chairperson
Heather Ainsworth-Secretary

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

November 18, 2025
MINUTES

LIFT Community Action Agency's Head Start/Early Head Start/EHS-CC Policy Council met on Tuesday, November 18, 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 10:32 a.m. by Darla Galyon, HS/EHS/EHS-CC Director. A quorum was established. Members present: Keri Smith; Antlers HS, Christie James; Horace Mann II, TraviAnna Wright; Horace Mann III, Gene Taylor; Hugo IV, Brandi Hobbs; Idabel I, Leslie Palmer; Rattan, Hailey Ensey; Soper II, Bessi Black, Consuelo Splawn and Shade Dill; Community Representatives.

HS/EHS/EHS-CC staff present included: Darla Galyon; HS/EHS/EHS-CC Director, Jordan Mack; HS/EHS/EHS-CC Assistant Director, Mattie McKee; EHS-CC Assistant Director, Lori Henry; HS/EHS/EHS-CC Secretary, Susie Mashburn; Education Specialist, Sommer Springfield; Assistant Education Specialist, Sara Moore; Professional Development Specialist, Brittany Bailey; ERSEA Specialist, Jaely Martin; Assistant ERSEA Specialist, Christina Merritt; Family/Community Engagement Specialist, and Ashley Stinson; Disability/MH Specialist.

Consideration and Possible Action to Accept the minutes from the October 21, 2025 meeting. Copies of the minutes were provided to the council for review. Shade Dill made a motion to accept the minutes as presented, Keri Smith seconded, all voted in favor, motion passed.

Consideration and Possible Action to Enter into Executive Session to Discuss the Employment, Transfer, Hiring, Appointment, Promotion, Demotion or Disciplining of employees Stefie McSwain-Idabel Special Needs Aide, and Kayla Moore-Idabel Special Needs Aide, 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 Gene Taylor, all voted in favor, motion passed.

Consideration and Possible Action to accept HS, EHS, EHS-CC, SAF, OECP, USDA, and Non-Fed September, 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. Leslie Palmer made a motion to accept, seconded by Gene Taylor, all voted in favor, motion passed.

Presentation of October, 2025 Financial Statements and Credit Card Distribution Reports: Darla Galyon, HS/EHS/EHS-CC Director presented the October, 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 December 16, 2025 meeting.

Presentation of the 2025 Head Start/Early Head Start/EHS-CC Widely Held Expectations and School Readiness Training: Susie Mashburn, Education Specialist provide a handout along with a power point presentation and discussion.

Policy Council Training On: The Open Meeting Act and Mission, Vision and Values: Sara Moore, Professional Development Specialist provided and overview and discussion the Open Meeting Act and Mission, Vision and Values for Policy council members present.

Other Reports/Announcements:

Recruitment & Enrollment Update/Enrollment and Attendance Report-Brittany Bailey, ERSEA Specialist: Jordan Mack reported that as of today, 11/18/2025, that 235 children are currently enrolled in Head Start for the 2025-2026 School Year and attendance was 88.4%. Recruitment is an ongoing process and are still be accepted and processed. Early Head Start currently has 44 children enrolled and attendance was 87.3%. Early Head Start-CC currently has 103 children enrolled and attendance was 89.00%.
Governing Board Report: Mattie McKee- Mattie McKee reported the Governing Board did not meeting in November, but would be meeting December 9, 2025.
USDA Meals and Snack Report-Lauren Barger: Jordan Mack, HS/EHS/EHS-CC Assistant Specialist provided a copy and an overview summary of meals and snacks served for October, 2025.
Data Analysis-Jordan Mack- Darla Galyon, HS/EHS/EHS-CC Director gave an overview of the data assessed for September, 2025
OHS Communications and Guidance-Darla Galyon presented and reviewed all OHS Communications and Guidance received since the last council meeting.
P**rogram Summary Report-Darla Galyon** presented the HS/EHS/EHS-CC Program Summary for the council to review.
Family Resource Center Update-Ashley Gaddy-The Family Resource Center provided a comprehensive monthly update that covers a range of key areas including training initiatives, client intakes, and upcoming projects and events. These updates serve as a valuable communication tool to keep parents and partners informed and engaged. In addition to logistical and operational highlights, the center emphasizes parent engagement by sharing opportunities for families to participate in programs and activities. The FRC offers guidance on how community members can get involved, fostering an environment that supports family well-being and community collaboration.

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 no New Business

There being no other business to come before the board, Bessi Black made a motion to adjourn and Travi Anna Wright seconded the motion, all voted in favor and the meeting ended at 11:19 a.m.

____

Kylie Wilcox-Chairperson
Bessi Black-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: 10/17/25

Name of Person being nominated for Employee of the Month: DAWN MCKEE

Name of Person submitting the nomination: AMY WILSON

X Is a hard worker ____

X Respects others ____

____ Is on time ____

X Is organized ____

X Keeps a positive attitude ____

X Encourages other people ____

X Is willing to help others ____

____ Makes a good first impression ____

____ Follows all workplace rules ____

X Uses resources wisely ____

____ Has good work attendance ____

X Represents the agency well ____

____ Is a loyal employee ____

____ Handles crisis well ____

X Goes above and beyond the call of duty ____

X Works well with others (team player) ____

_____ Is creative ____________________

_____ Likes to learn new things ____________________

_____ Is a good listener ____________________

X____ Communicates well____________________

X____ Dependable ____________________

X____ Respectful, considerate of others ____________________

_____ Safety conscious ____________________

X____ Good problem solving skills ____________________

X____ Other ____________________

_____ Other ____________________

_____ Other ____________________

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

There are many things I can not comment on as I do not work in the same building, however I would like to comment on what I do know about.

Dawn and the WX crew have done a fantastic job of "rolling with changes" and there have been changes. Dawn makes sure that the WX paperwork is in tip top shape and does a outstanding job communicating with accounting.

Anyone reading this who works for LIFT should now I am hard to impress. Well the speed and ease with which Dawn manages the vast amount of paperwork is very much appreciated by accounting staff. Her own willingness to audit, find and fix errors invaluable.
Dawn is a hard worker, responds to communication quickly and is always willing to be a "test subject" to assist in the set up of new processes or procedures in Netsuite.

Submit nominations by the 30th of the month for consideration. Submit nominations to Kathy James at the Administration Office, by mail (209 N. 4th St., Hugo, OK 74743), by fax (580-326-2305), or by email (kathy.james@liftca.org). Nominations are judged by a five-member committee. If the person you nominate is not selected, it is okay to nominate that person again the following month if you feel he/she is deserving of the award.

Community Action Agency

Employee of the Month Nomination

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

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

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

Date: 10/2/2025

Name of Person being nominated for Employee of the Month: Jessica Watts

Name of Person submitting the nomination: Dionne Frankum

X Is a hard worker Always looking for something to do

X Respects others

X Is on time usually early

X Is organized Keeps building #4 organized and on task

X Keeps a positive attitude

X Encourages other people Jessica makes sure everyone feels welcome in our office and is helpful to all

X Is willing to help others

X Makes a good first impression

X Follows all workplace rules mostly :)

X Uses resources wisely She is like the FBI, if we can't find something she tracks it down

X Has good work attendance always at work and hates to take off

X Represents the agency well

X Is a loyal employee

X Handles crisis well Very good at handling crisis situations

X Goes above and beyond the call of duty

X Works well with others (team player) one of the best team players

LIFT Community Action Agency

_____ Is creative ______________________________

_____ Likes to learn new things ______________________________

X____ Is a good listener ______________________________

X____ Communicates well______________________________

X____ Dependable I can always depend on Jessica

X____ Respectful, considerate of others ______________________________

X____ Safety conscious ______________________________

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.

Jessica is the backbone of building #4. She keeps all of our appointments and reminds us if we forget. If we need a resource for a client she usually has one found within 10 minutes. We appreciate all her hard work. She is also always the one up for a little mischief and is usually the ringleader of any office shenanigans.

Submit nominations by the 30th of the month for consideration. Submit nominations to Kathy James at the Administration Office, by mail (209 N. 4th St., Hugo, OK 74743), by fax (580-326-2305), or by email (kathy.james@liftca.org). Nominations are judged by a five-member committee. If the person you nominate is not selected, it is okay to nominate that person again the following month if you feel he/she is deserving of the award.

Community Action Agency

Employee of the Month Nomination

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

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

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

Date: 8/28/2025

Name of Person being nominated for Employee of the Month: Ashley Gaddy

Name of Person submitting the nomination: Paige Smith

____ Is a hard worker ____
X Respects others She demonstrates respect and professionalism in every interaction.
X Is on time Always shows up on time and ready to work.
____ Is organized ____
X Keeps a positive attitude She makes the workplace better through her effort and attitude.
____ Encourages other people ____
X Is willing to help others She is always willing to help her coworkers without being asked.
____ Makes a good first impression ____
____ Follows all workplace rules ____
____ Uses resources wisely ____
____ Has good work attendance ____
X Represents the agency well She leaves a lasting positive impression on the people she serves.
____ Is a loyal employee ____
X Handles crisis well Handles difficult situations calmly and professionally.
X Goes above and beyond the call of duty She goes above and beyond to ensure task are done with excellence.
X Works well with others (team player) She collaborates effectively and contributes positively to the team.

Lift
Community Action Agency

_____ Is creative

_____ Likes to learn new things

_____ Is a good listener

X Communicates well She communicates clearly and effectively with others.

X Dependable She is highly dependable and can always be counted on to get the job done.

X Respectful, considerate of others She shoes thoughtfulness and respect in every interaction.

_____ Safety conscious

_____ 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.

I am nominating Ashley Gaddy for Employee of the Month because she consistently goes above and beyond in everything she does. She is dependable, hardworking, and always willing to lend a hand to her coworkers and the community. Ashley' s positive attitude is contagious and helps create a supportive, uplifting work environment. She takes initiative, handles challenges with professionalism, and always strives to give her best effort. Ashley also builds strong connections within the community and is dedicated to making a positive difference. She truly represents what it means to be a dedicated and valued employee, and I believe she deserves to be recognized for the impact she makes every day.

Submit nominations by the 30th of the month for consideration. Submit nominations to Kathy James at the Administration Office, by mail (209 N. 4th St., Hugo, OK 74743), by fax (580-326-2305), or by email (kathy.james@liftca.org). Nominations are judged by a five-member committee. If the person you nominate is not selected, it is okay to nominate that person again the following month if you feel he/she is deserving of the award.

Program Summary
Head Start/Early Head Start/Early Head Start-Child Care Programs
November 2025

Eligibility, Recruitment, Selection, Enrollment & Attendance

During the month of November there were 48 children, age birth to 3, that were provided services in the Early Head Start centers and 104 children served, age birth to 3, in the Early Head Start – Child Care locations. Services were provided for 234 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 October, we had 130 parents that participated in Parent Meetings. Family Advocates are continuing goals with families through the Family Partnership Agreements. Centers continue to invite parents and community members to participate in Parent Ready to Read by having story time with the children; there were 68 participants, with 11 being father figures.

Father Involvement

The dad's day activities for the month of October were various pumpkin decorating activities, making apple pies, and ghost activities. For the month of October Dad's Day, there were 170 people, which participated in dad's day activities with 82 being father figures. In addition, 31 dads/father figures participated in parent meetings for October. Since the beginning of the 2025-2026 school year, we have had 348 father figures participate in family engagement activities.

Nutrition

In the month of November, the nutrition team has been busy getting ready for our upcoming federal review, in the month of November we have been learning a new software system called kidkare that is a required software through the state of Oklahoma, that we have to participate in since we participate in the CACFP (Child and Adult Care Food Program). We also participated in the health advisory meeting that is held twice a year reporting on children's BMI numbers. We are prepping and getting ready to start our second round of annual kitchen checks.

Health

Most all of the 45-day screening for health is complete, with more to come as children continue to enroll in Head Start. Immunizations are going well, with only a few that need caught up. Some children have exemptions from immunizations. 220 out of 234 have passed hearing screening, with 14 having failed; they either have tubes, will either be rescreened or referred to an audiologist. 214 out of 234 have passed vision screenings. Of the 20 that failed, 5 passed a rescreen, 13 need a professional exam, and 2 received glasses. Currently there is only 2 children with a high lead level and parents are aware and is waiting on the doctor to rescreen. Early Head Start and Early Head Start-Child Care are currently in good shape with immunizations and are working on completing necessary exams. We will have 9 students who are aging out. If you know of any children that would like to attend please let us know and we will contact them. Well child exams/physical/dentals are doing well. We currently have 85% of physicals completed. Some are still in the 90-day timeframe. Dentals are at 78%, several of those are scheduled later this month and in December.

We have finished up our first round of folder checks. We currently keep staff updated with the newest safety info available. We are providing training to our centers on active supervision and health and safety on a regular basis. We are sending out information handouts on the Flu and RSV. We also are reminding parents not to kiss or pick up infants without permission due to cold and flu season being here. We have only had a very few cases of RSV/Flu.

We are still a training site for the American Heart Association and Oklahoma State Fire Service Training Center. We currently have 2 people in the office that can teach CPR.

Education

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

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

Professional Development

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

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

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

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

Disabilities/Mental Health/Transition

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

In November, our outreach efforts were strategically designed to increase awareness and enrollment for Head Start, Early Head Start, and Early Head Start–Child Care programs through a combination of community engagement, partnership development, and digital marketing initiatives.

Community Engagement and Partnerships:

We continued our monthly radio advertising campaign across three local stations to maintain consistent visibility and reach families throughout the region. Our team actively participated in local county coalition meetings, which provided opportunities to strengthen relationships with community partners, share program updates, and collaborate on strategies to support families in need. Additionally, we hosted an outreach booth at the LIFT Family Fun Resource Day in Antlers, where families were able to learn about our programs, ask questions, and receive enrollment materials. Preparations were also made for upcoming booths at community events in Idabel and Hugo, ensuring continued presence in key areas. Throughout the month, we distributed informational flyers and program applications at various locations to make enrollment resources easily accessible to the public.

Digital Outreach and Social Media Strategy:
Recognizing low enrollment in Idabel and Broken Bow, we implemented targeted social media campaigns to engage families in these areas. Our posts showcased classroom activities, highlighted program benefits, and promoted family events and resources. We also emphasized the importance of early childhood education and encouraged families to submit preschool applications. Facebook analytics for November reflect significant outreach efforts, with 24,100 views, 194 content interactions, 576 page visits, and 10 new followers, resulting in a net gain of seven. The most successful post focused on immediate openings in Idabel, generating 51 views and 17 interactions, while other posts included hiring announcements and holiday greetings, which contributed to overall engagement and visibility.

Collaboration with Advisory Committees:
We provided program information during the Health and Mental Health Advisory Meeting and the Family and Community Engagement Meeting, equipping community partners with resources to share with the families they serve. These partnerships are critical in extending our reach and ensuring that families receive accurate and timely information about available services.

Impact and Commitment:
These combined efforts of radio advertising, community presence, targeted social media campaigns, and partner engagement demonstrate our ongoing commitment to increasing program awareness and enrollment. By leveraging multiple outreach channels, we aim to connect with families where they are, provide accessible resources, and promote the benefits of early childhood education.

Office of Head Start (OHS) Monitoring
Fiscal Year 2026 (FY26)
Focus Area 2: Comprehensive Services Review Protocol

Focus Area 2: Comprehensive Services Review (FA2) Overview

Through the FA2 Review, the Office of Head Start (OHS) will explore how each grant recipient implements high-quality Head Start services for children and families. This document details the Fiscal Year 2026 (FY26) key topics included in the FA2 Review.

Program Design, Management, and Improvement

- Use of data to inform program planning, evaluation, and improvement
- Recruitment, supervision, and retention of a qualified staff team

Fiscal Infrastructure

- Budget development, implementation, and oversight
- Meeting the administrative and reporting requirements of the Head Start grant
- Internal controls to prevent fraud, waste, and abuse of federal funds
- Management of federally funded facilities and equipment

Eligibility, Recruitment, Selection, Enrollment, and Attendance

- Ensuring that families are eligible for Head Start services
- Selection of children and families who will benefit from Head Start services
- Maintaining full enrollment and promoting enrollment of children with disabilities

Education and Child Development

- Use of child assessments to individualize learning for all children
- Developmentally appropriate teaching and home visiting practices

Health Services

- Safety in staffing, facilities, and equipment
- Support for children to receive medical and oral health care
- Mental health consultation services
- Nutrition services that meet all children’s needs
- Support for expectant families

Family and Community Engagement Services

- Welcoming environments that support families’ engagement in the program
- Collaboration with families to develop and progress toward meeting family goals

What to Expect: FY26 FA2 Review

FA2 Review Approach

The FA2 Review is a 3.5-day review event that includes on-site and virtual activities. All review events will be led by a Review Lead and a team of reviewers.

Before the Review

- Grant recipients will be notified in summer 2025 if they will receive an FY26 FA2 Review. All notifications will be sent through Head Start Enterprise System (HSES) Correspondence.
- OHS will confirm the date of the review 45 days in advance. A small number of reviews are unannounced and will not have a 45-day confirmation letter.
- A Review Lead will schedule a virtual planning touchpoint with the Head Start director and the fiscal officer. The planning touchpoint provides an opportunity to discuss questions, share requests for information, and confirm the 3.5-day schedule.

During the Review

Grant recipients will showcase their strengths and practices through the FA2 Review activities, including:

Touchpoints with program leaders prior to the review and at the end of each review day

Kick-off meeting with director, fiscal officer, and program managers

Data testing to review fiscal transactions and eligibility files

Discussions with program staff members, the governing body, and the policy council

Data tours with director, fiscal officer, and managers

Explorations in centers, classrooms, and home-based group socializations

After the Review

The FA2 Review ends with a final touchpoint on the last day of the review. All documentation must be received no later than 12:00 p.m. on the final day of the review to be considered. Following the review, OHS will issue a report with information about the grant recipient's performance. OHS will use the review results to inform training and technical assistance support.

HeadStart.gov

How Children Respond to Stress and Trauma

headstart.gov/publication/how-children-respond-stress-trauma

Children are very affected by the events, situations, and environments around them. Research shows that when children experience trauma or intense stress without enough support to heal, they are more likely to have challenges into adulthood. The good news is that a positive relationship with even one caring adult can help reduce the effect of trauma on a child's life. When families and Head Start staff understand the effects of stress and trauma, children get the support and care they need to cope.

Types of Stress That Affect Children

> **Examples of ACEs**
>
> - Physical, sexual, and emotional abuse
> - Emotional and physical neglect
> - Separation from primary caregivers (divorce, incarceration, foster care, death of caregiver, or other situations)
> - Living with a family member with a mental health issue or substance use disorder
> - Witnessing domestic violence
> - Poverty
> - Violence in the community

Stressful or traumatic experiences will not affect all children in the same way. But there are several common events that can harm children's long-term health if they don't get support from adults.

Adverse Childhood Experiences

Adverse childhood experiences (ACEs) are terms for stressful events in children's lives. Children of all backgrounds can have ACEs. This term comes from a research study that showed the more ACEs in a person's life, the higher the risk for health and mental health problems.

Recently, researchers have begun to examine the effects of positive childhood experiences (PCEs). For instance, positive parenting practices are PCEs that reduces the effect of any ACEs a child might have.

Chronic Stress

Chronic stress is when a person has high levels of stress over time — such as exposure to ACEs — and does not have enough support. Children in a constant state of stress without protective experiences can develop significant challenges. Ongoing stress can interrupt their brain growth, affect organ development, and raise the risk of cognitive delay. Lots of stress over time can hurt children's health and development. They need support from caring adults.

Social Determinants of Health

Social determinants of health (SDOH) are things in everyday life that affect health. They are the conditions in which people are born, grow, play, work, live, and age. Most people have a mix of positive and challenging conditions in their life.
Examples of SDOH:

- Safe place to live, neighborhoods, and transportation
- Education, job options, and income
- Access to nutritious foods and ways to be physically active
- Polluted air and water
- Language and literacy skills

Some SDOH can protect children and families from the effects of more challenging conditions. Protective SDOH — like affordable education, access to healthy food, or safe places to spend time outside — help communities stay healthy. Libraries, parks, playgrounds, sidewalks or walking paths, and recreation centers create positive experiences. They support the social, emotional, and physical well-being of everyone in the community. They can reduce stress from more challenging conditions.

Some SDOH — like poverty, problems getting good health care, or neighborhood violence — are a common source of chronic stress. These kinds of chronic stress can become ACEs without buffering experiences.

Witnessing a Crisis

Children can be affected by seeing or hearing about a tragic event or crisis. Sometimes, even hearing or seeing pictures of a tragedy on the news can have a big impact. If the crisis on TV is stressful or painful for the adults in the family, children are more likely to react too.

How Children May React to Stress and Trauma

Children may not have the language to talk about their stress and feelings. Adults should watch for common behaviors during or after trauma, especially if they are new or have changed a lot for a child.

The best way to tell if children are stressed and need extra support is by getting to know them individually. Knowing what is typical for each child helps any changes in behavior stand out. A new behavior might be concerning or confusing. Take time to talk with other adults in the child's life and ask questions. Staff can use a trauma-informed approach to learn about and respond to a child's new behaviors.

Signs of Stress or Trauma in Young Children

- Not eating or becoming picky about what or how they eat
- Problems sleeping
    - Having nightmares
    - Not wanting to sleep alone
- Toileting problems, bedwetting
- Anxious, either avoiding or clinging to adults
- Sad, moody, irritable
    - Harder time playing with others
    - More tantrums
    - Overreacting to minor bumps or falls
- More complaints of headaches and stomachaches
- Not paying attention, restless, "spacing out"

- Wanting things done only their way
- More physical violence
  - Hitting others
  - Playing in violent ways
- Regression, not being able to do the things they used to
  - Wanting to be carried or rocked all the time
  - Baby talk
- Over- or under-reacting to being touched or to loud noises like sirens or doors slamming
- Intense focus on the event or situation
  - Wanting to always talk about what happened
  - Wanting to know all the details of the event
  - Asking the same questions about the event again and again
  - Being afraid the event will happen again
  - Recreating the event by drawing, playing, or talking about it

These signs are things to watch for and to learn more about, not a checklist or screening tool. On their own, items on this list do not mean a child had or is having trauma. Many of these behaviors are developmentally appropriate for children as they learn and grow. Also, a child may have trauma and not show any of these signs of stress.

How to Support Children Through Stress and Trauma

Adults Can Help Children Build Resilience

Children are more resilient when they have strong and caring relationships with adults. Resilience helps children cope with stress and heal after trauma. Build children's resilience by:

- Spending time playing, laughing, and talking with children. Safe and stable relationships are the best protection against stress and trauma.
- Responding to children's needs. Try to give them what they need to heal, which may mean giving them extra attention, a physical connection, or chances to talk about their feelings.
- Paying attention to children's behavior. What is their behavior trying to tell you?
- Keeping a consistent daily routine as much as possible. Children feel safer when they know what is going to happen in their day.
- Comforting children. Make sure they know there are adults who can keep them safe.
- Asking them about their feelings. Encourage them to talk or draw about their feelings.
- Trying to stay calm in stressful situations. Young children are always watching, listening, and learning. They absorb the feelings of adults around them.

If a child is showing signs of trauma and stress, these supportive strategies can help them cope. Some children may also benefit from referrals to mental health professionals who focus on helping children cope with trauma.

Head Start Programs Can Help Families Build Resilience

Head Start programs have a unique opportunity to help families heal and reduce chronic stress in their lives. Focus on building protective SDOH to help families build a strong and healthy foundation. Having a safe place to live, access to food, and a doctor they trust can make it easier for families to cope after stress and trauma. Supporting family well-being helps caregivers build resilience and be ready to support their children in a crisis.

Head Start programs can use two-generation approaches and community partnerships to meet the needs of children and families. Programs can:

- Build partnerships with families. Support family mental health and well-being with the family assessment and partnership process. Use this process to find and help families with stressful things in their life.
- Talk to families about mental health during the intake process. Ask families for their opinions about mental health. Explain what mental health supports are available at the program, like mental health consultation services. Share other resources in the community.
- Check in often with families to ask about their health and mental health. For example, use family-teacher conferences to ask how families are doing. Create a drop-box for caregivers to privately ask staff for help. Set aside time in every family meeting to practice wellness.
- Ask the mental health consultant to introduce themselves at family events. This helps families get to know the mental health consultant at their program and how they might get support.

Resources for Head Start Staff and Families

For Program Staff

Head Start Heals: Podcast Series
A podcast series highlighting how Head Start staff can support families during tough times. Topics also include how to talk to children and families about challenging topics.

Supporting Children Facing Trauma
This webinar series gives Head Start staff the tools to understand trauma and its effect on young children and to build resiliency. It offers program leaders strategies to make sure Head Start programs are ready to serve children and families affected by trauma.

Breaking Through: Understanding Stress and Resilience in Young Children
This 20-minute educational video shows how chronic stress can affect a child's lifelong health and well-being. Hear how Head Start programs and health care professionals are working to prevent chronic stress.

Resilience and Coping with Trauma
This webpage offers resources for early educators on how to respond to different traumatic experiences for young children and their families.

ACEs and Chronic Stress: Frequently Asked Questions
This infographic is a summary of ACEs, chronic stress, and trauma in young children. It has links to resources about stress and brain development, health risks, and circumstances.

For Families

> **Helping Your Child Through Stress And Trauma With Families Who May Need Support**
> Find out how adults can help children feel safe and heal from scary and stressful things.
>
> Resource also available in:
>
> - Arabic (العربية)
> - Chinese (中文)
> - Haitian Creole (Kreyòl ayisyen)

> - Persian (فارسی)
> - Somali (Af-Soomaali)

Sesame Street Workshop Resources: Traumatic Experiences
Sesame Street Workshop has lots of family-friendly resources to support children after trauma or crisis. There are videos, handouts, and articles that help children learn how to cope and express their feelings.

The Ability to Cope: Building Resilience in Yourself and Your Child
Resilience helps both children and adults cope with the big and little stresses of life. Learn more about resilience and some simple ways to build it in your family every day.

Helping Your Child Cope After a Disaster
Adjusting to change and loss is extra hard for children under 5. They have not developed their own coping skills yet. They depend on caregivers, family members, and teachers to help them through hard times. This resource gives families tips on how best to support young children after a disaster.

Caregiver Tips for Helping Infants and Toddlers after Disasters
This resource helps caregivers understand how very young children often behave after a disaster. It explains behaviors and suggests next steps for adults to support their child.

Children and Domestic Violence
These handouts for caregivers help adults support children who experience or witness domestic violence. Topics include keeping children safe, talking about feelings, celebrating a child's strengths, and self-care for adults.

Read more:

Mental Health and Emergencies, Resilience and Coping with Trauma, Trauma and Children
, Mental Health

Last Updated: June 12, 2025

September 2025 HEAD START TIME & ATTENDANCE REPORT

As of 9/30/25	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	2	**12**			0	**12**	**0**		**12**	1	18	**90.2%**
Boswell 1	11	2	**13**			0	**13**	**0**		**13**	4	17	**82.4%**
Boswell 2	11	2	**13**			0	**13**	**0**		**13**	7	17	**92.0%**
Broken Bow	11	4	**15**			0	**15**	**0**		**15**	1	21	**82.4%**
Forest Grove 1	11		**11**		1	1	**10**	**1**	**9/26/2025**	**11**	4	17	**86.5%**
Forest Grove 2	13	1	**14**			0	**14**	**0**		**14**	8	17	**83.8%**
Fort Towson	10	1	**11**			0	**11**	**0**		**11**	5	18	**90.1%**
Horace Mann 1	10	5	**15**		2	2	**13**	**2**	**9/12/2025**	**15**	3	19	**83.9%**
Horace Mann 2	17		**17**	**1**	1	2	**15**	**1**	**9/10/2025**	**16**	2	19	**92.5%**
Horace Mann 3	11	4	15		2	2	**13**	**2**	**9/29/2025**	**15**		19	**85.2%**
Hugo 2	12	2	**14**		2	2	**12**	**2**	**9/29/2025**	**14**	1	19	**79.4%**
Hugo 4	11	1	**12**		2	2	**10**	**2**	**9/29/2025**	**12**	1	19	**89.5%**
Idabel 1	4	7	**11**			0	**11**	**0**	**9/26/2025**	**11**	1	21	**96.3%**
Idabel 2	12	3	**15**	**1**	3	4	**11**	**3**	**9/26/2025**	**14**		21	**93.4%**
Idabel 3	8	6	**14**		1	1	**13**	**1**	**9/26/2025**	**14**		21	**91.0%**
Rattan	11	3	**14**	**2**	1	3	**11**	**1**	**9/29/2025**	**12**	3	17	**96.7%**
Soper 1	7	1	**8**			0	**8**	**0**		**8**	4	17	**90.4%**
Soper 2	16		**16**			0	**16**	**0**		**16**	8	17	**90.4%**
TOTALS	**196**	**44**	**240**	**4**	**15**	**19**	**221**	**15**		**236**	**53**		**88.4%**

September 2025 Pre-K TIME & ATTENDANCE REPORT

As of 9/30/25	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		1	1			0	1	2	100.0%
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	17	92.7%
TOTALS	4	1	5	0	0	0	5		92.9%

September 2025 EHS Time and Attendance

As of 9/30/25	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		1	1	23	2	1	9/26/2025	21	90.0%
Hugo	14		14	2		2	12	1	0		21	77.8%
Idabel	13	3	16	5	1	6	10	1	1	9/15/2025	21	92.5%
TOTALS	**51**	**3**	**54**	**7**	**2**	**9**	**45**	**4**	**2**			**87.3%**

September 2025 EHS-CC Time and Attendance

As of 9/30/25	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	94.1%
ELC-Broken Bow	10		10	2	1	3	7		1	9/19/2025	21	91.9%
ELC-Hugo	10		10	2		2	8		0		21	86.3%
ELC-Idabel	17	3	20	6		6	14	1	0		21	87.8%
Cabbage Patch	33		33	9	1	10	23	3	1	9/30/2025	21	89.3%
The LearningTree	45	2	47	9	2	11	36	5	2	9/23/2025	21	87.2%
TOTALS	**123**	**5**	**128**	**28**	**4**	**32**	**96**	**10**	**4**			**88.7%**

October 2025 HEAD START TIME & ATTENDANCE REPORT

As of 10/31/25	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	12		**12**		2	2	**10**	**2**	**10/13/2025**	**12**	1	17	**89.7%**
Boswell 1	13		**13**			0	**13**	**0**		**13**	4	17	**90.5%**
Boswell 2	13		**13**			0	**13**	**0**		**13**	7	17	**93.7%**
Broken Bow	15	1	**16**		2	2	**14**	**2**	**10/23/2025**	**16**	1	20	**88.6%**
Forest Grove 1	11		**11**	**1**	1	2	**9**	**1**	**10/7/2025**	**10**	4	16	**86.5%**
Forest Grove 2	14		**14**			0	**14**	**0**		**14**	8	16	**87.5%**
Fort Towson	11		**11**			0	**11**	**0**		**11**	5	17	**84.0%**
Horace Mann 1	15	3	**18**	**2**	1	3	**15**	**1**	**10/24/2025**	**16**	3	19	**87.7%**
Horace Mann 2	17		**17**	**2**		2	**15**	**0**		**15**	2	19	**92.3%**
Horace Mann 3	15		15	**2**		2	**13**	**0**		**13**		19	**94.7%**
Hugo 2	14	3	**17**	**2**	2	4	**13**	**2**	**10/14/2025**	**15**	1	19	**77.8%**
Hugo 4	12	3	**15**	**2**		2	**13**	**0**		**13**	1	19	**88.3%**
Idabel 1	11		**11**			0	**11**	**0**		**11**	1	20	**83.6%**
Idabel 2	15	3	**18**	**4**	1	5	**13**	**1**	**10/9/2025**	**14**		20	**92.7%**
Idabel 3	14	1	**15**	**1**		1	**14**	**0**		**14**		20	**86.8%**
Rattan	14		**14**	**3**		3	**11**	**0**		**11**	3	17	**93.1%**
Soper 1	8		**8**			0	**8**	**0**		**8**	4	17	**88.2%**
Soper 2	16		**16**			0	**16**	**0**		**16**	8	17	**93.4%**
TOTALS	**240**	**14**	**254**	**19**	**9**	**28**	**226**	**9**		**235**	**53**		**89.0%**

October 2025 Pre-K TIME & ATTENDANCE REPORT

As of 10/31/25	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	1		1			0	1	16	100.0%
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	17	94.1%
TOTALS	5	0	5	0	0	0	5		95.2%

October 2025 EHS Time and Attendance

As of 10/31/25	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	4	28	1	3	4	24	2	3	10/22/2025	21	85.8%
Hugo	14		14	2	1	3	11	1	1	10/14/2025	21	80.8%
Idabel	16		16	6	1	7	9	1	1	10/17/2025	21	75.0%
TOTALS	**54**	**4**	**58**	**9**	**5**	**14**	**44**	**4**	**5**			**82.2%**

October 2025 EHS-CC Time and Attendance

As of 10/31/25	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		20	95.6%
ELC-Broken Bow	10	1	11	3	1	4	7		1	10/17/2025	21	83.3%
ELC-Hugo	10		10	2		2	8		0		21	80.4%
ELC-Idabel	20	3	23	6	2	8	15	1	2	10/17/2025	21	73.4%
Cabbage Patch	33	3	36	10	2	12	24	3	2	10/7/2025	22	92.6%
The LearningTree	47	1	48	11	2	13	35	5	2	10/24/2025	22	85.5%
TOTALS	**128**	**8**	**136**	**32**	**7**	**39**	**97**	**10**	**7**			**85.7%**

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

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

Month	Breakfast	Lunch	Snack	Monthly Total
October-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
October-25	3108	3165	6748	13021
YEARLY TOTALS	28320	28642	38060	95022

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

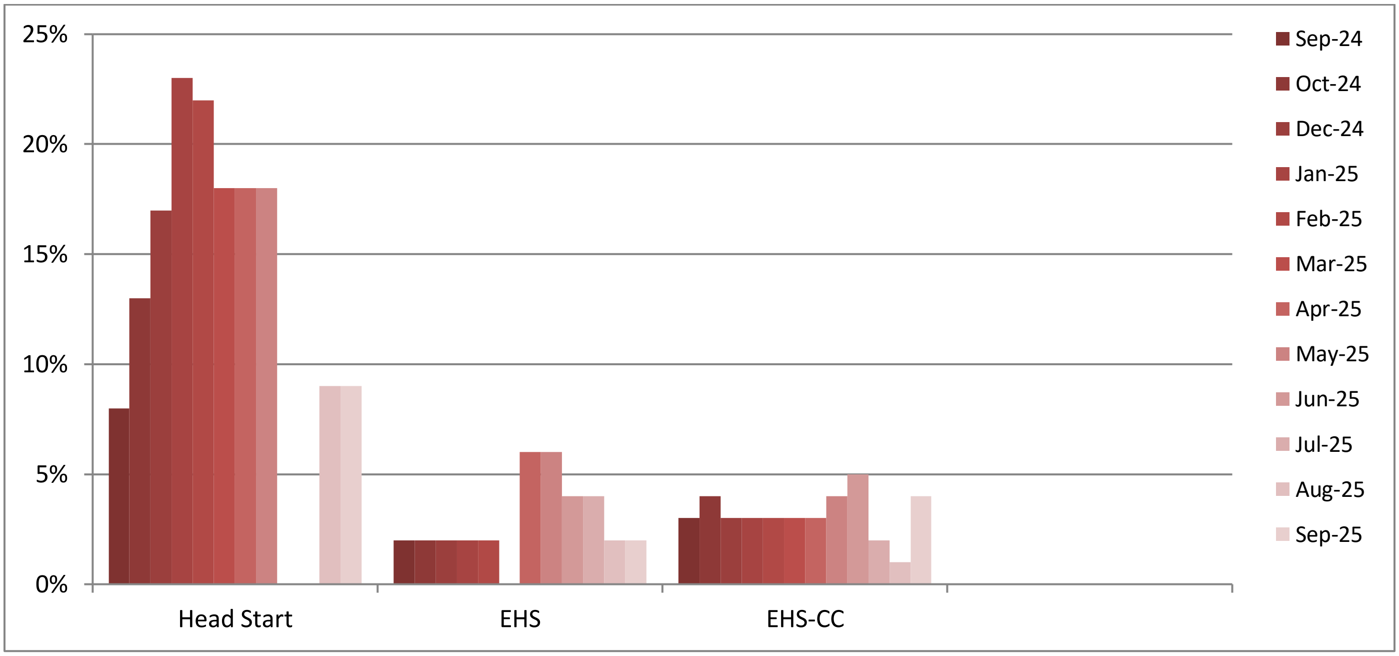
Children that eat 2 meals and a snack at Head Start/ Early Head Start receives 1/2 to 2/3 of their daily nutritional needs.

Month	Breakfast	Lunch	Snack	Monthly Total
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
October-25	3108	3165	6748	13021
November-25	2239	2284	2645	7168
YEARLY TOTALS	27485	27883	36948	92316

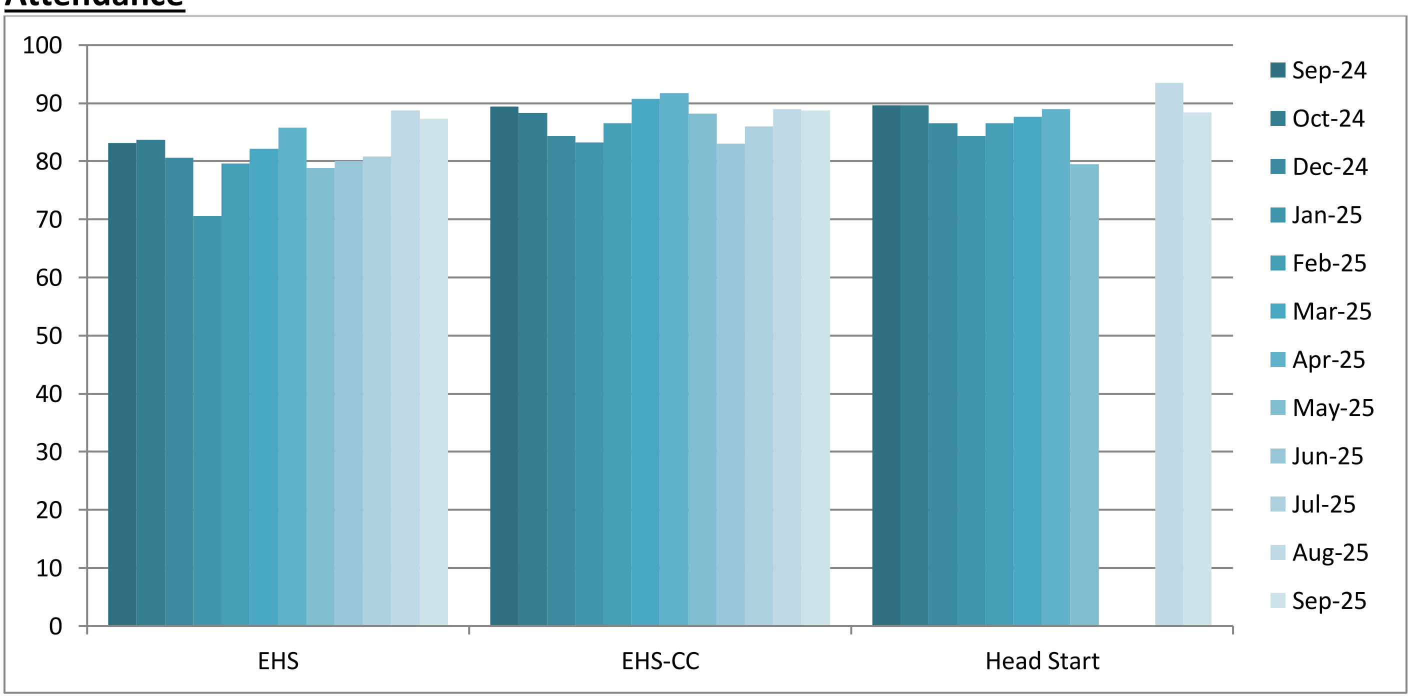
Data Analysis Report Summary
October 2025

Disabilities

IEP/IFSP –

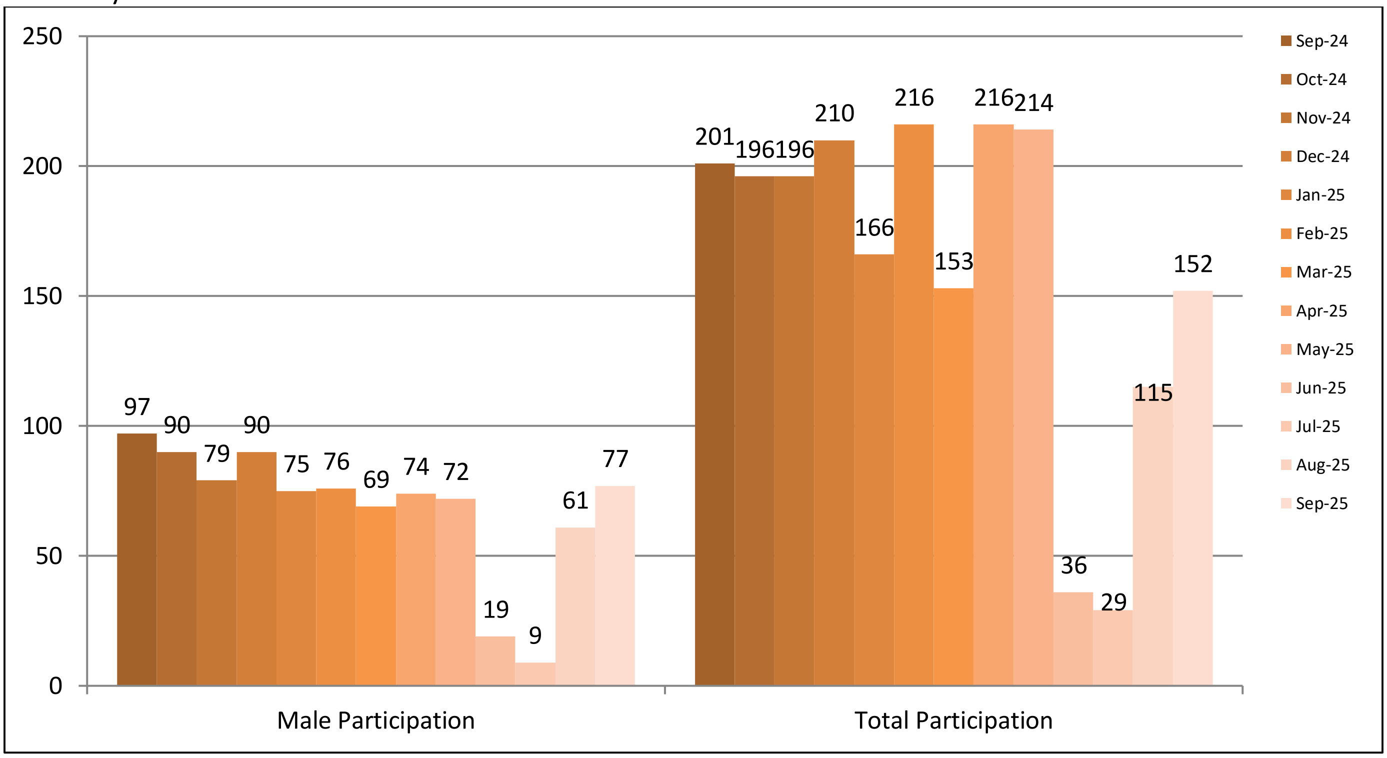


Attendance

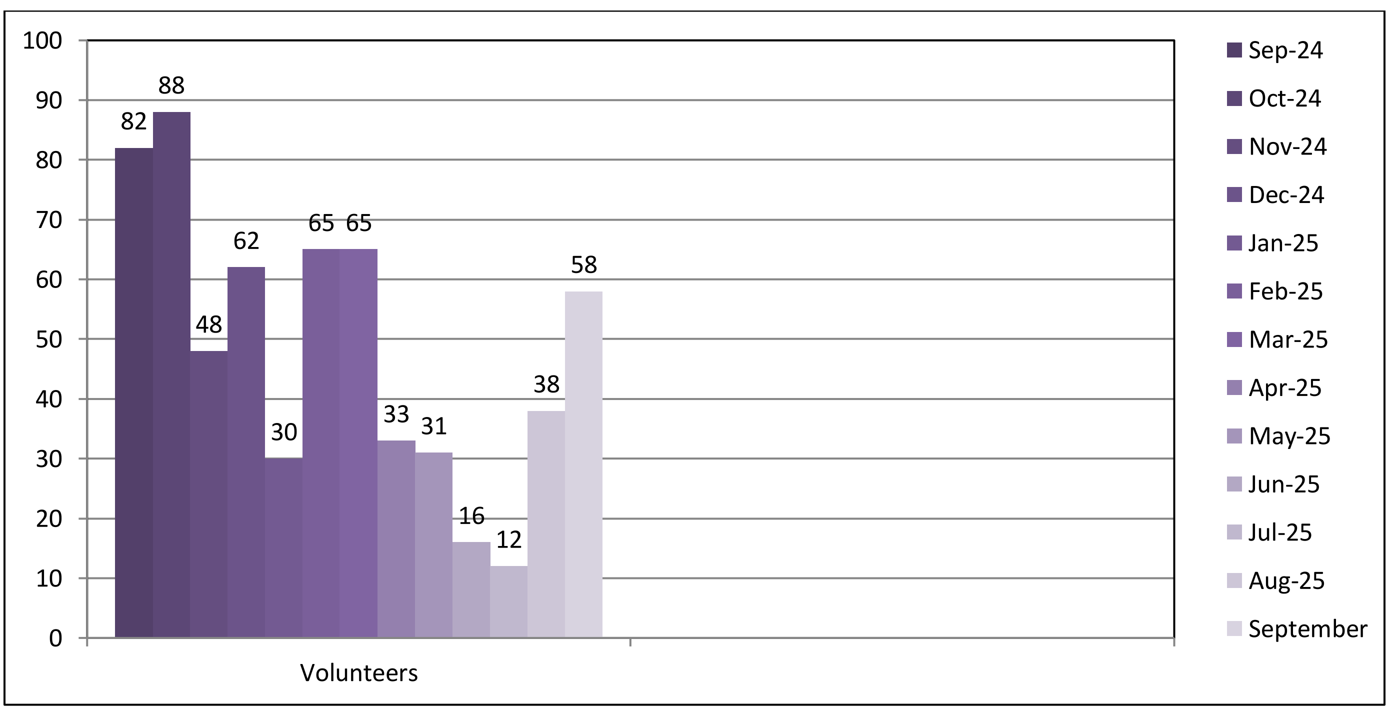


Family & Community Engagement

Dad's Day



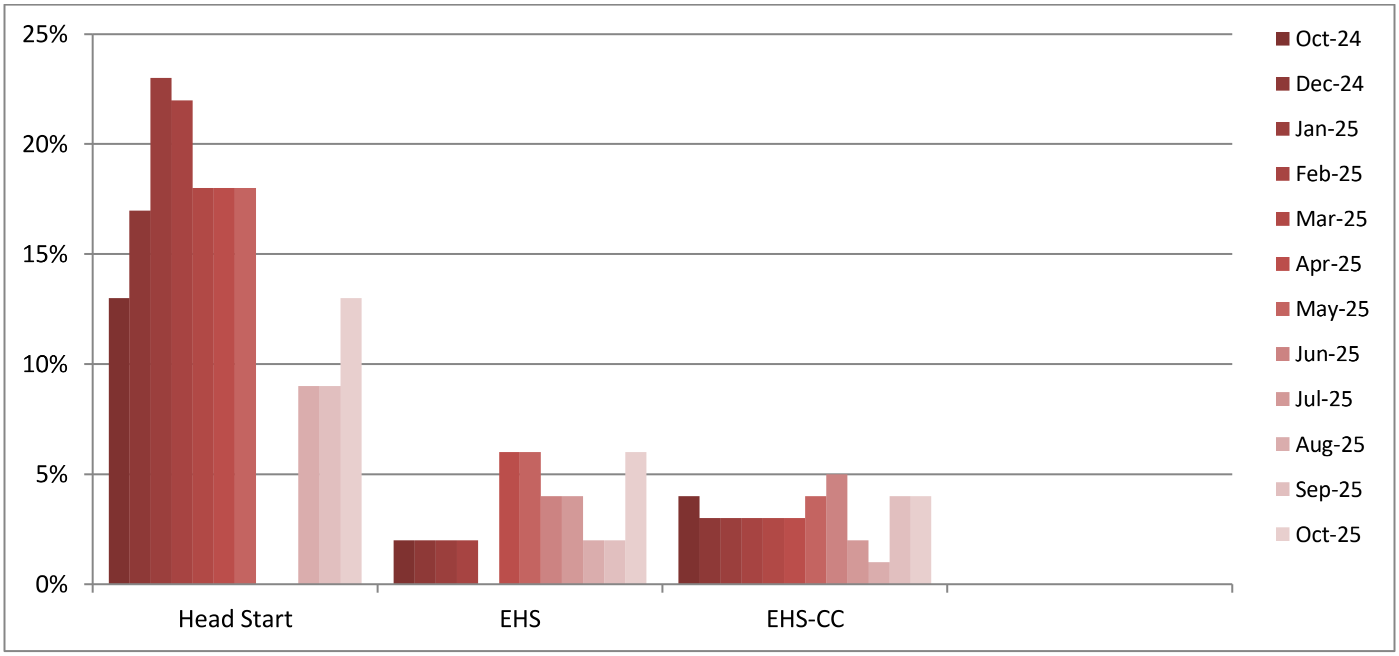
Parents Ready to Read



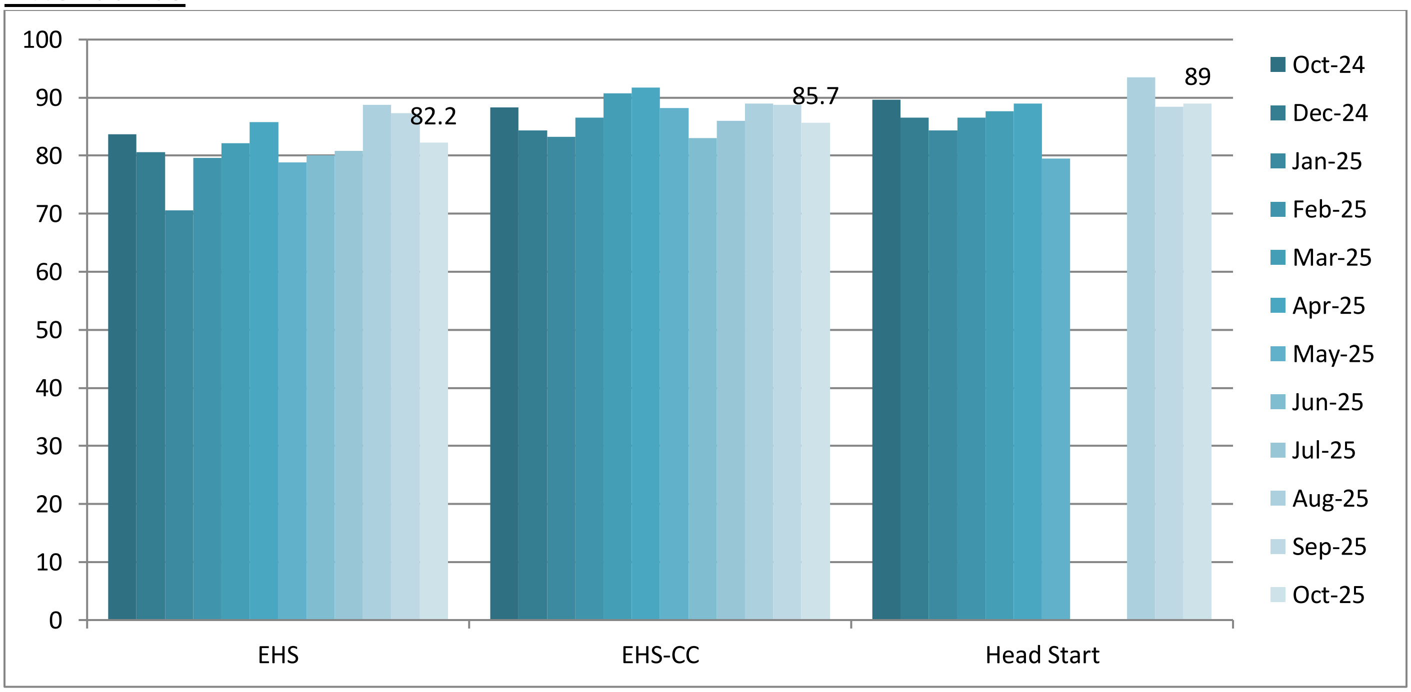
Data Analysis Report Summary
November 2025

Disabilities

IEP/IFSP –

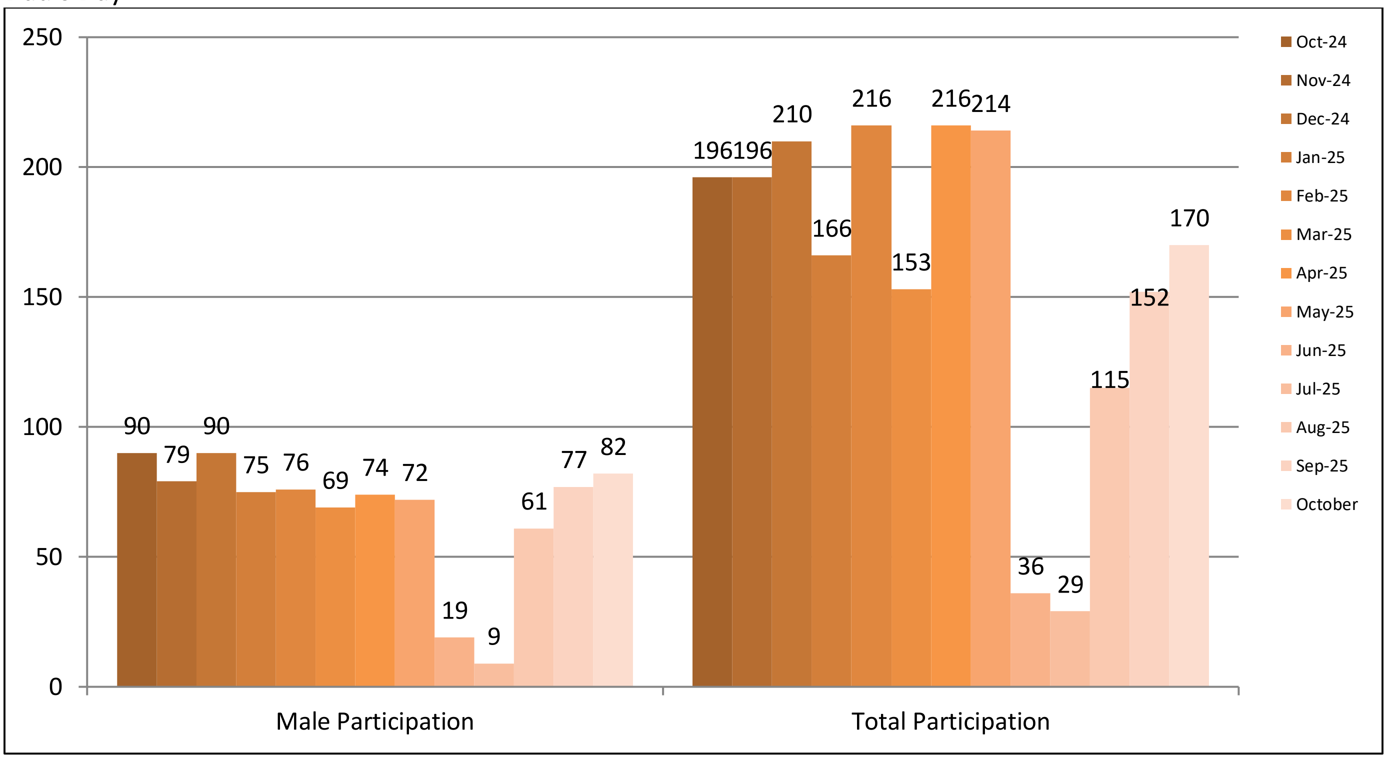


Attendance

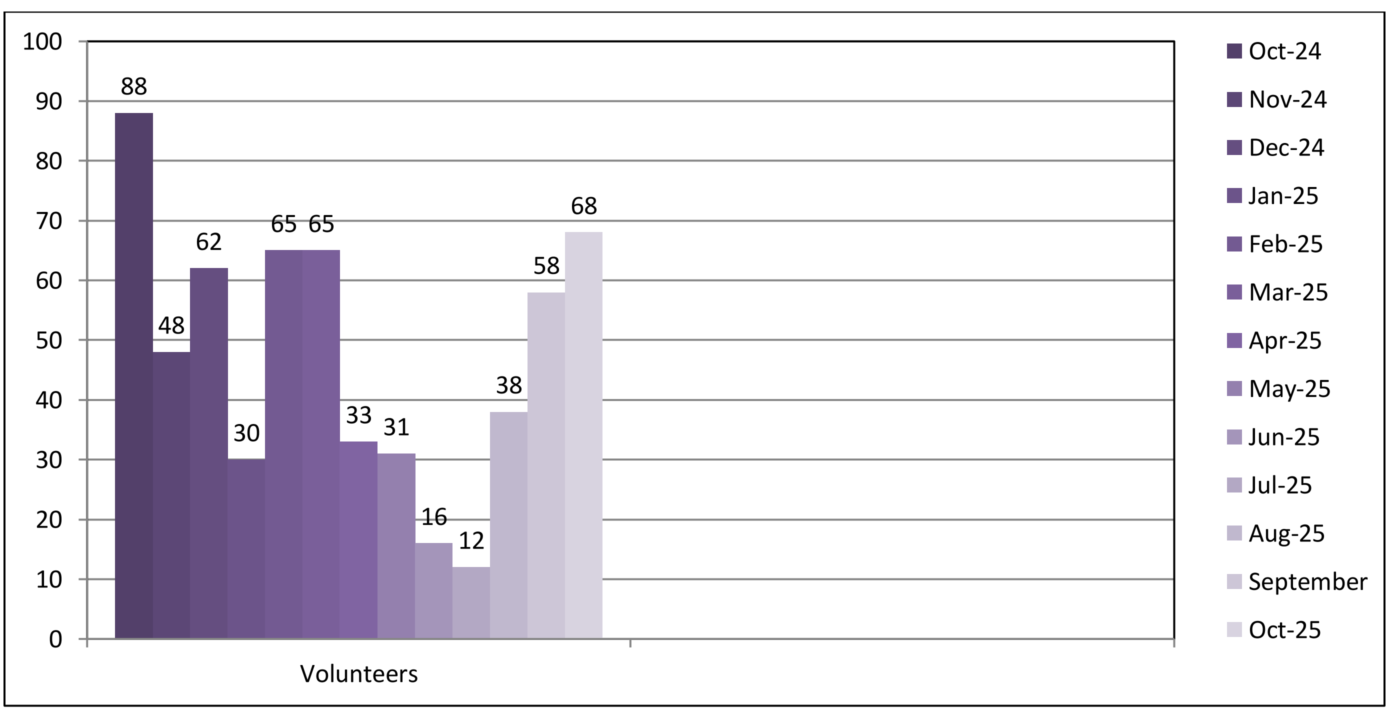


Family & Community Engagement

Dad's Day



Parents Ready to Read



Emergency Services Fundraiser

Housing is hosting a T-shirt/sweatshirt fundraiser to raise money for LIFT CAA's Emergency Services programming. The T-Shirts are $25.00, and the Sweatshirts are $35.00, or if you are wanting a T-Shirt and Sweatshirt they can be bundled for $50.00. The survey link is listed below.

T-Shirt/Sweatshirt Design:

Payment Information:

· Cash/Check – Please contact Brandon McDaniel or Amanda Perry (580-326-3351)

· Card – Please utilize the donation feature on LIFT's website. There will be an option for the Emergency Services Center in the drop-down box.

Order Form: https://forms.office.com/Pages/ResponsePage.aspx?id=wH9g3yD2akq0d8NsqdZ67gBfgYOvfM5PsRBv9eyyiuJUNkxSOUxBRTNWMkNNQ1hIMzhOTkFIMUQ1VC4u