

AGENDA: OTTAWA COUNTY COMMUNITY ACTION AGENCY
Advisory Board Meeting: Wednesday, June 17, 2026 10:00am
12251 James Street Holland, MI 49424-Main Conference Room

Mission: Ottawa County Community Action Agency aims to reduce the effects of financial hardships by promoting self-sufficiency and empowering individuals and families to achieve economic independence.

I. Call to Order

II. Consent Items

- A. Approval of minutes from April 15th meeting (pages 3-4)
- B. Approval of CSBG Plan and Budget (pages 5-9)
- C. Approval of MEAP Plan and Budget (pages 10-15)

III. Reports

- A. Finance (OS 8.7)
 - 1. Fiscal Report; Update on fiscal status (page 16)
- B. Program Oversight and Development (OS 5.9)
 - 1. Program reports (pages 17-19)
- C. Advisory Board
 - 1. Opening in Private Sector

IV. Old Business

- A. Bylaws

V. New Business

- A. Recent donations
- B. Grant submissions
- C. Fundraiser on Thursday!
- D. Emergency Solutions Grant update

VI. Discussion

- A. Client Assistance Policy (pages 20-21)
- B. Mission Statement Review (OS 4.1)

VII. Public Comment

VIII. Adjourn

**Next Meeting: Wednesday, August 19, 2026 at 10am at 12251 James Street Holland, MI
49424- Main Conference Room**

**OTTAWA COUNTY COMMUNITY
ACTION AGENCY ADVISORY BOARD**

Mission Statement: Ottawa County Community Action Agency aims to reduce the effects of financial hardships by promoting self-sufficiency and empowering individuals and families to achieve economic independence.

MEETING MINUTES

DATE: April 15, 2026

TIME: 10:00 am

LOCATION: 12251 James Street, Holland

PRESENT: Molly Brouwer, Nathan Slauer, Gabrielle Dunai, Britney Brown, Esther Fifelski, Danielle Weeks

STAFF: Jennifer Brozowski, Kerri Mammoser, Barb Koning, Megan Kwantes, Emma Bryant

QUORUM: Yes

Call to Order

The meeting was called to order by Jennifer Brozowski.

Announcements

- A. The County audit is available on the County website. This is the link:
<https://miottawa.org/fiscal-services/audits/> There were no findings this year.

Consent Items

- A. Meeting minutes from February 18, 2025, were approved.

Reports

- A. Finance (OS 8.7)
- a. The financial report was included in the board packet.
 - b. The fiscal year is half completed.
 - c. Weatherization grants are underspent but are expected to spend out.
 - d. TEFAP funds have been received.
- B. Program Oversight and Development Reports (OS 5.9)
- a. Reports were provided in the board packet.
 - b. A question was raised about when a client can come for utility assistance.
Typically, clients are sent to MDHHS first for state emergency relief funds.

C. Advisory Board

- a. Britney Brown has been approved for her 2nd term on the advisory board.

Old Business

- A. The 2026 Walk for Warmth was held Friday, February 20. The current total raised from the event is \$17,976.02. A few donations are still coming in. Walk for Warmth for 2027 is being held Saturday, February 20, at 8:30 am at EV Construction. The event in 2027 will be going back to “basics” with coffee and donuts being served. One suggestion was to recruit “teams” from area businesses to attend.
- B. The OCCAA advisory board bylaws were reviewed by County Corporate Counsel. There were suggestions made for revisions. One of the revisions would be to have OCCAA be part of the interview process for new board members. This is currently done by the appointment and alignment committee of the Board of Commissioners. Jen is waiting for feedback from the County administrator on the changes to the bylaws.

New Business

- A. The annual report for FY25 was provided in the packet. It included the progress on the strategic plan. One of the goals for the strategic plan was a rebranding of the agency. The report features the new OCCAA logo and tag line in alignment with that goal. OCCAA has increased area outreach and is working on forming partnerships with area businesses. Jen asked for volunteers to participate in the next round of strategic planning.
- B. Customer satisfaction data was presented to the board. Overall, OCCAA has received positive feedback from the community. There are revisions being made to the survey that will include questions about access to services and likeliness to refer others to OCCAA. A question will be added about how a client found OCCAA – friend, another agency, internet, etc.

Discussion

- A. The FY27 budget information has been released. A link was provided to that information. The budget from the White House includes cuts to CSBG, IJJA or BIL and LIHEAP. IJJA or BIL and LIHEAP are part of the weatherization program. This is very similar to the FY26 budget that was presented a year ago. The CAA network was able to overcome those cuts last year and are hopeful this will be the case for FY27 as well.

Public Comment - None

Adjournment at 10:54 am

Next meeting is scheduled June 17, 2026, at 10:00 am at 12251 James Street in the main conference room.

CAA Name	0	Planned Program Period	
Grant Number	CSBG27-2027-	Begin Date	10/1/2026
Budget Total	\$	406,543.96	End Date 9/30/2028

CSBG Expenditure Plan Summary

Line Item	Administration	Direct Program	Total
Salaries	\$ 16,631.98	\$ 59,033.73	\$ 75,665.71
Fringe Benefits	\$ 10,064.15	\$ 41,472.45	\$ 51,536.60
Occupancy	\$ 1,033.00	\$ 5,853.69	\$ 6,886.69
Communication	\$ 496.40	\$ 4,807.60	\$ 5,304.00
Supplies	\$ 399.96	\$ 600.00	\$ 999.96
Equipment	\$ 70.00	\$ -	\$ 70.00
Transportation	\$ 3,151.00	\$ 750.00	\$ 3,901.00
Contracted Services	\$ 500.00	\$ 744.00	\$ 1,244.00
Specific Assistance to Individuals		\$ -	\$ -
Miscellaneous	\$ 260,936.00	\$ -	\$ 260,936.00
Totals	\$ 293,282.50	\$ 113,261.47	\$ 406,543.96

Community Needs Assessment (Section 676(b)(11) of the CSBG Act):

A Community Needs Assessment (CNA) is defined as a comprehensive assessment of community needs and resources as defined in the CSBG Act. Regular assessment of needs and resources at the community level is the foundation of Community Action and a vital management and leadership tool that is used across the organization and utilized by the community to set the course for both CSBG and all agency resources.

Note: See CSBG State Plan Section 13

1. Date of most-recent, board-approved Community Needs Assessment: Fall 2024
2. Does your agency use a third party to help create your Community Needs Assessment, or does your agency create the CNA internally? Due to our size and smaller funding streams, we utilize United Way's Community Assessment.
3. As part of the CNA, please explain how the agency collected and included current data specific to the following for the service area? (Check all that apply) *(related to Org Std 3.2)*

☒ Data on Poverty ☒ Data on Gender ☒ Data on Age ☒ Data on Race/Ethnicity

How did you collect this data?

☐ Focus Groups ☒ Program participant Interviews ☐ Parent Surveys

☒ Questionnaires

☒ Data Sources: Qualtrics, Census, ALICE Data

☐ Other:

4. Describe how your agency collected and analyzed both qualitative and quantitative data on the geographic service area(s) for the CNA? *(Related to Org Std 3.3)*

Program Director serves as co-chair of the Basic Needs Work Group of the 2024 Community Needs Assessment. OCCAA has Basic Needs data/results during Work Group sessions. The Work Group will analyze every question of the household survey to study the individual responses and the overall quality/reliability of the responses. The Work Group also will help determine the most accurate presentation of the data for the final published Community Assessment. A variety of informative charts, graphs, and spreadsheets will be used to convey this important information to the community. Also included were quotes/comments from actual program participants, and community members facing a variety of challenging individual and social difficulties that many of the local social service agencies seek to address. In addition, OCCAA Director provided an Executive Summary highlighting key takeaways for

OCCAA and analyzed internal Customer Satisfaction Survey data to track unmet needs, along with utilizing CALL 2-1-1 data.

5. From the community assessments, client and community needs studies currently being used by your agency for annual and long-range strategic planning describe, list, summarize and rank emerging needs your agency plans to address (directly or through coordination/linkages):

#	Needs from CNA	Program(s) and strategy(ies) to Address Need	Summary of Program(s) and strategy(ies)	If need is not addressed by your agency, select why:
1.	Utility Costs	Utility Assistance	OCCAA provides emergency utility assistance for income eligible households.	Choose an item.
2.	Affordable Housing	Housing Quality Standards (HQS)	OCCAA provides HQS inspections for local agencies providing permanent supportive housing services and emergency housing to lower income individuals and families	Choose an item.
3.	Housing Assistance	Weatherization	This program provides weatherization services keeping people safely in their homes and contributes to the improvement of the housing stock in Ottawa County.	Choose an item.

Service Delivery System: (*Section 676(b)(5) of the CSBG Act*)

Describe the overall Service Delivery System for services provided or coordinated with CSBG funds targeted to low-income families in the state. Please include specific examples.

Describe the agency's service delivery system for services provided with or coordinated with CSBG funds.

1. Where do program participants enter your agency's system? (Check all that apply)

- ☒ Main Administrative Office
- ☐ Centralized Call Center
- ☐ Field Offices/Neighborhood Centers County(ies):
- ☐ Mobile Site
- ☒ Online Application
- ☒ 2-1-1 Referral
- ☒ Other: MiBridges, phone, and agency general email inquiries

2. Describe the intake process utilized for program participants seeking services and assistance.

OCCAA clients contact intake staff multiple ways. They can fill out a form online, send an email to our main email inbox, call or walk in. Clients are encouraged to fill out a pre-screening form to determine income eligibility before providing eligibility documentation.

In addition, individuals can also be referred through MiBridges or CALL 2-1-1 of the Lakeshore. Necessary documentation is collected via email, over the phone, or in person during an appointment to help determine eligibility following the pre-screening process. Assistance and approval is provided either through email or at an in-person appointment.

3. Identify which county(ies), if any, in the CSBG service area do not have a neighborhood (county) center and explain how services are delivered to residents of that/those county(ies):

4. How does your agency avoid duplication of services in your service area?

OCCAA actively participates in both Ottawa County case collaborators groups that meet regularly to share agency/program information. Participation in these groups allows OCCAA to stay up-to-date with new programs or changes in programs that may affect the population base that it serves. If there was potential for duplication to occur, OCCAA can initiate or participate in discussions to deal with this issue. Ottawa County has traditionally been a county where there is a high degree of communication and cooperation between its social service agencies.

5. Does your agency provide case management?

☒ Yes ☐ No ☐ Other:

If yes, how does your agency define case management, and how is it provided? For example, how often does your agency follow up with program participants? Etc.

OCCAA provides very short-term case management to clients that receive utility assistance and weatherization services. This service is often provided over the phone and email, and follow-up occurs as often as needed until the client's more emergent need is met. OCCAA would like to provide more long-term case management services that are not just crisis-based in nature, but there is limited funding to provided these resources. OCCAA focuses on referrals to the most appropriate short-term or long-term resources in the community to ensure continuity of care.

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**Michigan Energy
Assistance Program
Planning Application for
FY 2027**

**Bureau of Community Action and
Economic Opportunity**
Grand Tower Building
235 S. Grand Ave
Lansing, MI 48909
MDHHS-BCAEO@michigan.gov

Submission Date: 5-22-2026

Grant Term: October 1, 2026 - September 30, 2027

EGrAMS Agreement Number: TBD

Federal ID (EIN): 38-6004883

Agency Name: OCCAA-Ottawa County Community Action Agency

Authorized Signatory Name and Title: Jennifer Brozowski, Program Director

Contact Email for Service Plan Clarifications: jbrozowski@miottawa.org

Contact Email for Budget Clarifications: jbrozowski@miottawa.org and ebryant@miottawa.org

County(ies) to be served: Ottawa

Certification	Authority: PA 230 of 1981 Completion: Mandatory Penalty: No Funds Released
Approved by agency's board on: Will be approved by agency's board on: June 17, 2026	
The Michigan Department of Health and Human Services (MDHHS) does not discriminate against any individual or group because of race, sex, religion, age, national origin, color, height, weight, marital status, genetic information, sexual orientation, gender identity or expression, political beliefs or disability. If you need help with reading, writing, hearing, etc., under the Americans with Disabilities Act, you are invited to make your needs known to a MDHHS office in your county.	

The undersigned hereby certify that this agency complies with the Assurances and Requirements of the Michigan Energy Assistance Program and the information in this Service Plan and Budget is correct and has been authorized by the governing body of this organization.

Authorized Signature (electronic signatures accepted) Date

Service Plan Narrative

In the following pages, describe how your CAA will utilize MEAP to assist in the resolution of energy crisis situations and work with eligible households to develop an energy security plan that will enable participants to become or move toward becoming self-sufficient.

1. List and briefly explain each MEAP self-sufficiency service your CAA will provide and how the self-sufficiency services will enable low-income households to become or move toward become self-sufficient. Link each service your CAA will provide to one of the allowable self-sufficiency activities.
A response is required to Question 1 only if your agency needs to provide updates to the approved FY 2024 Service Plan.

Self-sufficiency Category	CAA Program/Service Name	CAA Program/Service Description & Contribution to Self Sufficiency
<i>Example: Financial Counseling</i>	<i>Budgeting 101</i>	<i>ABC CAA will provide Budgeting 101 services through Self-sufficiency funding that will enable households to create a budget, track monthly income and expenses</i>

2. List and briefly describe each non-MEAP wraparound service your CAA will provide to MEAP clients. You may enter the information below, copy/paste from other written materials, or attach other documentation, whichever is least burdensome.
A response is required to Question 2 only if your agency needs to provide updates to the approved FY 2024 Service Plan.

Service Name and Description	Funding Source	Location(s) Offered
<i>Example: ABC CAA Utility Assistance Program offers utility assistance for eligible households.</i>	<i>Walk for Warmth</i>	<i>235 S Grand Ave., Lansing MI 48933</i>

3. Explain how your CAA's MEAP program will be coordinated with other services offered at the agency, especially other utility/energy assistance services.

A response is required to Question 3 only if your agency needs to provide updates to the approved FY 2024 Service Plan.

Click or tap here to enter text.

4. MEAP providers are expected to encourage households to pursue potential resources, including the Home Heating Credit (available to households at or below 110% FPL, applications can be filed from January 1 – September 30 each year). Briefly describe how such resources will be provided.

A response is required to Question 4 only if your agency needs to provide updates to the approved FY 2024 Service Plan.

Click or tap here to enter text.

5. Describe steps to be taken to ensure that the low-income household's needs are assessed through the MEAP Needs Assessment Tool, documented, and retained in the client file, including utilization of the Energy Security Plan.

A response is required to Question 5 only if your agency needs to provide updates to the approved FY 2024 Service Plan.

Click or tap here to enter text.

6. Estimate Total number of households to be served through MEAP in any capacity (self-sufficiency plus direct energy payment):

FY27 125

7. Estimate the total number of households to be served with self-sufficiency services

FY27 75

8. Estimate the total number of households to be served with direct energy payments (including by Affordable Payment Plans)

FY27 95

9. Estimate the total number of households to be newly enrolled in Affordable Payment Plans

FY27 15

10. Estimate the total number of households that enrolled in Affordable Payment Plans during FY26 that will continue in FY27.

11. Estimate the total amount of funds needed for FY26 Affordable Payment Plan clients during FY27.

FY27 \$35,000 based on current monthly projections

12. Confirm that your CAA's information is accurate in Michigan 2-1-1?

☒ Yes, confirmed

13. Who will be the primary point of contact for MEAP? Please include name, position title, and email address.

A response is required to Question 13 only if your agency needs to provide updates to the approved FY 2024 Service Plan.

Name: Jennifer Brozowski
Position Title: Program Director
Email Address: jbrozowski@miottawa.org

14. Who is/are the Mi BRIDGES Navigator(s) at your CAA? Please include name and position title. You may also include this information as a separate attachment.

A response is required to Question 14 only if your agency needs to provide updates to the approved FY 2024 Service Plan.

Name: Megan Kwantes (remove)
Position Title: Grant and Development Coordinator
Name: Click or tap here to enter text.
Position Title: Click or tap here to enter text.
Name: Click or tap here to enter text.
Position Title: Click or tap here to enter text.
Name: Click or tap here to enter text.
Position Title: Click or tap here to enter text.
Name: Click or tap here to enter text.
Position Title: Click or tap here to enter text.

15. Indicate the status of your CAA's working relationship with the local MDHHS office(s) in your service area(s) by checking one of the options below.

☒ We have a good working relationship and do not need assistance to improve coordination.
☐ We need BCAEO's assistance to improve coordination with the local DHHS office(s)

16. Describe the procedures your CAA will use to verify the accuracy of APP invoices received from BCAEO/participating utilities.

OCCAA will ensure the APP invoices are accurate by cross checking with participating utilities agencyportal (where available). Discrepancy inquiries will be directed to BCAEO for resolution.

17. Describe the procedures your CAA will use to ensure compliance with all reporting requirements and deadlines.

OCCAA will ensure that all information is up-to-date in empowOR for all assisted households by inputting all awards and actions plans as they occur. OCCAA fiscal staff maintains a calendar of deadlines for monthly FSRs and SOEs.

18. Confirm that your agency will work with BCAEO to reconcile your agency's monthly Statement of Expenditure (SOE) with programmatic and APP reporting each month.

☒ Yes, confirmed

19. Include any other information that is believed to be pertinent but not specifically requested in this service plan that will explain your process in administering MEAP

MEAP can be a difficult program to administer, especially when it comes to the budget, as APP amounts are never able to be predicted. This affects how many direct assistance payments we are able to do.

OCCAA FY26 (October 2025 - September 2026) Available Funds

Grant	Grant timeframe	FY26 Budget	Spent YTD	Percentage spent	Balance	FY25 Budget	Spent YTD
Community Services Block Grant - FY25 Carryover	Oct 2024 - Sep 2026	318,691.31	\$ 288,850.47	91%	29,840.84	628,160.78	365,825.23
Community Services Block Grant FY26	Oct 2025 - Sep 2027	377,197.00	-	0%	377,197.00		
General Fund Contribution	Oct 2025 - Sep 2026	281,323.11	-	0%	281,323.11		
Total		977,211.42	288,850.47	91%	688,360.95	628,160.78	365,825.23

Utility Assistance Grants

Grant	Grant timeframe	FY26 Budget	Spent YTD	Percentage spent	Balance	FY25 Budget	Spent YTD
Michigan Energy Assistance Program	Oct 2025 - Sep 2026	83,197.00	45,688.81	55%	37,508.19	65,000.00	38,751.66
Water Affordability Grant	Oct 2024 - Sep 2027	101,200.00	26,617.90	26%	74,582.10	100,000.00	31,616.67
Consumers Energy	Jan 2026 - Dec 2026	246,000.00	14,372.56	6%	231,627.44		
Walk for Warmth Program			7,474.25				12,240.39
Total		430,397.00	94,153.52	22%	343,717.73	165,000.00	82,608.72

Food Assistance Grants

Grant	Grant timeframe	FY26 Budget	Spent YTD	Percentage spent	Balance	FY25 Budget	Spent YTD
The Emergency Food Assistance Program	Oct 2025 - Sep 2026	100,288.00	33,427.57	33%	66,860.43	100,000.00	40,216.82
Total		100,288.00	33,427.57	33%	66,860.43	100,000.00	40,216.82

Weatherization Grants

Grant	Grant timeframe	FY26 Budget	Spent YTD	Percentage spent	Balance	FY25 Budget	Spent YTD
Department of Energy Grant - FY26	Oct 2025 - June 2026	520,280.00	207,328.41	40%	312,951.59	484,223.04	345,571.30
Low Income Home Energy Assistance Program	Oct 2025 - Sep 2026	544,315.00	229,782.71	42%	314,532.29	381,426.00	135,962.44
Bipartisan Infrastructure Law Grant	Oct 2025 - Sep 2026	696,687.00	126,010.02	18%	570,676.98	670,487.00	116,420.07
Deferral Reduction	Jan 2024 - Sept 2026	263,283.15	113,086.25	43%	150,196.90	347,319.84	122,248.00
Deferral Supplemental	Oct 2025 - Sept 2029	275,289.00	-	0%	275,289.00		
Total		2,299,854.15	676,207.39	29%	1,623,646.76	1,883,455.88	720,201.81

Home Rehab Program

Grant	Grant timeframe	FY26 Budget	Spent YTD	Percentage spent	Balance	FY25 Budget	Spent YTD
Local Water Utility Affordability	Oct 2024 - Sep 2026	41,890.52	35,641.95	85%	6,248.57	50,000.00	33,677.57
Community Development Block Grant	July 2025 - June 2026	54,219.00	284.40	1%	53,934.60	-	90.00
Total		96,109.52	35,926.35	86%	60,183.17	50,000.00	33,767.57

Subrecipient Grants

Grant	Grant timeframe	FY26 Budget	Spent YTD	Percentage spent	Balance	FY25 Budget	Spent YTD
Emergency Solutions Grant	Oct 2025 - Sept 2026	278,945.00	170,980.24	61%	107,964.76	287,358.00	179,021.06
Total		278,945.00	170,980.24	61%	107,964.76	287,358.00	179,021.06

OCCAA Energy Education, Home Energy 101 and Homeowner Programs

May 2026

Home Energy 101 and 201

	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	YTD
HE101 and 201	4	4	7	0	2	1	1	2					21

HQS Inspections

	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	YTD
HQS Inspections	10	11	8	11	8	8	2	5					63

Homeowner Programs

	Oct	Nov	Dec	Jan	Feb	March	April	May	June	July	Aug	Sept	YTD	In Prog.
Home Rehab (Emergency)	0	0	0	0	0	0	0	0	0	0	0	0	0	1

Weatherization Prog.

Dept. of Energy (DOE) July-June Goal: 30	0	1	2	0	1	0	2	1					7	17
BIL Oct-Sept Goal: 68	0	2	0	0	3	1	0	0					6	4
Wx Sup Goal:	0	0	0	0	0	0	0	0					0	0
Wx Def Goal:	1	4	1	0	1	1	1	0					9	1
LIHEAP Oct-Sept Goal: 10	0	0	1	0	4	1	1	1					8	17
Combined	1	7	4	0	9	3	4	2	0	0	0	0	30	39

OCCAA Utility Assistance Statistics (FY 2025-2026)
May 2026

Grant		Oct	Nov	Dec	Jan	Feb	March	April	May	June	July	Aug	Sept	YTD/Total
Walk for Warmth	Expenses	\$0	\$0	\$0	\$0	\$0	\$586	\$526	\$588					\$1,700
	Households	0	0	0	0	0	3	3	3					9
	Avg Payment	\$0	\$0	\$0	\$0	\$0	\$195	\$175	\$196	\$0	\$0	\$0	\$0	\$189
Water Affordability Grant	Expenses	\$574	\$3,029	\$423	\$625	\$1,345	\$1,796	\$3,083	\$1,052					\$11,926
	Households	3	5	3	3	6	8	8	3					39
	Avg Payment	\$191	\$606	\$141	\$208	\$224	\$225	\$385	\$351	\$0	\$0	\$0	\$0	\$306
MI Energy Assist Prog (\$50,000)	Expenses	\$219	\$1,759	\$2,780	\$2,404	\$1,994	\$3,912	\$0	\$0					\$13,068
	Households	1	6	11	8	8	9	0	0					43
	Avg Payment	\$219	\$293	\$253	\$300	\$249	\$435	\$0	\$0	\$0	\$0	\$0	\$0	\$304
MEAP - APP responsibility (part of \$50,000)	Expended	1,435	2,474	3,463	2,189	4,962	2,900	2,325	1,980					21,728
	Payments	14	14	18	19	22	23	23	19					152
	Avg Payment	\$102	\$177	\$192	\$115	\$226	\$126	\$101	\$104	\$0	\$0	\$0	\$0	\$143
ZBPW (\$5,000+)	Expenses	\$0	\$0	\$0	\$0	\$219	\$1,271	\$492	\$0					\$1,983
	Households	0	0	0	0	1	2	2	0					5
	Avg Payment	\$0	\$0	\$0	\$0	\$219	\$636	\$246	\$0	\$0	\$0	\$0	\$0	\$397
Consumers Grant	Expenses	\$0	\$0	\$0	\$0	\$0	\$4,164	\$4,067	\$3,753					\$11,984
	Households	0	0	0	0	0	9	9	9					27
	Avg Payment	\$0	\$0	\$0	\$0	\$0	\$463	\$452	\$417	\$0	\$0	\$0	\$0	\$444
Denials		1	3	4	1	6	22	11	29					77
FY 2025/6 Monthly Totals	Expenses	\$2,228	\$7,262	\$6,665	\$5,217	\$8,520	\$14,630	\$10,493	\$7,372	\$0	\$0	\$0	\$0	\$62,388
	Households	18	25	32	30	37	54	45	34	0	0	0	0	275
	Avg Payment	\$124	\$290	\$208	\$174	\$230	\$271	\$233	\$217	\$0	\$0	\$0	\$0	\$227
FY 2024/5 Monthly Totals	Expenses	\$5,293	\$4,708	\$7,120	\$9,586	\$9,749	\$11,319	\$9,615	\$8,771	\$6,787	\$5,402	\$4,794	\$4,955	\$88,100
	Households	18	23	38	37	49	50	47	47	51	30	28	23	441
	Avg Payment	\$294	\$205	\$187	\$259	\$199	\$226	\$205	\$187	\$133	\$180	\$171	\$215	\$200

The Emergency Food Assistance Program (TEFAP)

	Households Served		Total Slots	Pounds Received	Value
	Mass Dist	Pantry			
(Second Quarter) Jan - March 2026	534	4,576	2,330	51,136	\$2,809.35
(Third Quarter) April - June 2026			2,330		
(Fourth Quarter) July - Sept 2026			2,330		
(First Quarter) Oct - Dec 2026			2,330		
Calendar Year (2026) To Date Totals	534	4,576		51,136	\$2,809.35
Totals from Fiscal Year 2025	2,196	18,381		266,767	\$17,651.25

Client Assistance Policy

Assistance Guidelines

- OCCAA will assist utility customers with up to **2,000 dollars every 12 months**. This can be a combination of multiple grants.
- Clients can be assisted up to twice in one 12-month period.
- **clients will have a lifetime cap of \$5,000.**
- Before an assist can occur for electric, natural gas, or propane, the client will be required to apply for an SER with DHS, if they have not already received services from DHS
- If client is currently enrolled in an APP program OR is enrolling in an APP program, OCCAA will not be able to assist with any additional MEAP or W4W funds
- A client's first assist with the agency does not require a copay, unless the amount due on the utility exceeds the agency cap for a particular grant. For each assist after this, client will be required to pay a minimum of 10% of the utility bill they are seeking assistance with. This is waived if client will already have a copay assigned due to their bill exceeding agency caps
- If client is seeking repeated assistance, a review of their goals may be required; with proof that they are working toward or have 'succeeded' at one of their goals.

Case Management/Referral Process

First assist

At the time of the first assist, intake staff will engage in dialogue with the client to find out the following:

- "What caused you to fall behind on your utility bill?"
- "What are you able to pay toward the current bill?"
- "What have you already paid toward your current bill?"

Clients will also be required to fill out the Resource Checklist Worksheet to identify goals to help them be successful in the future.

Suggested examples of referrals include:

- Free online courses through FDIC <https://www.fdic.gov/resources/consumers/money-smart/index.html>
- Community Action House
- Energy savings education information from OCCAA
- Internal, OCCAA referrals to other programs

Second Assist

At the time of the second assist, and at all subsequent assists, intake staff will follow up with the client regarding the resources they received during the first assist and the goals set during the first assist. If these resources were not explored, staff will revisit these resources with the client and find out what the barrier was/is. The following should be met:

- **DHHS application and/or denial**
- **Proof that the client has reached out to other resources (including internal, OCCAA resources) and/or made progress toward their written goal**
- **Proof that client has paid something toward their bill**

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