Proposal

- Federal Reserve review
- CRA eligible ‘on face’

Portal & Presentation

- Available online
- In-person pitch
- Funder Response Form

Partnership

- Discussion
- Relationship
Investment Connection Across Federal Reserve Banks:
Atlanta
Cleveland
Dallas
Minneapolis
New York
Richmond
St. Louis
INVESTMENT CONNECTION

Community Development Investment and Lending Partnership

Funder Response Forms Evaluations
Creston Park
Kassy Malone, Vice President of Development
Community Enhancement Corporation
Commercial Kitchen Incubator & Culinary Workforce Development School

Enhanced Neighborhood Streetscape

Linear Parks

Neighborhood HUB
CRESTON PARK
FUNDING REQUEST

PHASE 1
$45,112,233

First Mortgage
Deferred Developer Fee
GAP Funding: $5,500,000
LIHTC Equity

CARE SUITES
$32,250,750

First Mortgage
LIHTC Equity
GAP Funding: $1,000,000

PHASE 2
$65,620,950

First Mortgage
Deferred Developer Fee
GAP Funding: $4,000,000
LIHTC Equity
Expansion of Health Benefits Navigation Services

Cindy Williams, Chief Operating Officer
WorkLife Partnership
Denver, CO-based
13-Year-Old Non-Profit
Serving workers nationally
Lopez Foods and Goodwill Industries of Central OK
4,000 workers served in 2022
41 active business partnerships

Driving job retention, career mobility and economic opportunity among incumbent workers.
What We Do

• Individualized, human-to-human support for incumbent workers
• Services delivered through employer partners
• 3 Programs: Resource Navigation, Health Benefits Navigation, Small Dollar Loans (Colorado only)
• Reduce stress, increase confidence, improve loyalty
• Bottomline impact to businesses and communities
• The “Social Contract of Work”
• Component of Workplace Equity Efforts

“My Navigator was very personable and relational. He seemed to care about my work life journey.”

“I really appreciated how my Navigator took me from a tough place of not knowing where to begin on something to finding me the information and tools to start looking into financial help. He gave me a stepping-stone to begin my journey and helped me when I didn’t know where to begin.”
WorkLife’s Request

- Single or Combined investment of $100,000
- Expansion in OKC market
- Focus on Health Benefits Navigation programming
- Strengthen program infrastructure and expand impact
- Focus on engaging more workers of color
- Helping more workers access employer-sponsored benefits including health insurance and healthcare
- Engage with at least 2-3 more OKC businesses
- Increase utilization of HBN services to 3% of all workers reached
- Improve impact measurement for HBN programming
- Share aggregate data around the issues impacting healthcare use by lower wage workers
- Ongoing sustainability via increased utilization of WorkLife’s combined services and employer FFS
City Lights Village: A tiny home community

Sarah Grounds, Executive Director
The City Lights Foundation of Oklahoma
Our Community

- Triplex Modular Homes
- 400 sq ft
- Fully Furnished
- Fire walls and sprinkled
- Individual porches

Additional Services:
- Community Center
- Laundry Facility
- Wrap-around Services
- Gardens and walking paths
Home is:

- A permanent place
- A dwelling place
- A storied place
- A resting place
- A place of hospitality
- A place of inhabitation
- A place of orientation
- A place of belonging
Hispanic Chamber Women's Business Center
and Hispanic Chamber Business Center

David Castillo, President and Chief Executive Officer
Greater Oklahoma City Hispanic Chamber of Commerce
Helping Minority Businesses to Succeed

**NEED**
33% of the new businesses are being opened by women and minorities
We serve an underserved community
Most of our students are from the OKC area

**INTAKE**
- Intake – Addressing needs
- Help with writing a Business Plan
- Help with Establishing Business
- Licenses and Permits

**BUSINESS CLASSES**
- We offer 3 levels of classes
- Level 1 – Start up
- Level 2 – Running and managing your Business
- Level 3 - Procurement
HCWBC/HCBC – “UNIDOS SE PUEDE”

MONTHLY FOLLOW UPS
• Monthly Counseling Sessions
• Evaluating Progress
• Making Recommendations

LEADERSHIP TRAINING
• Crece – (Grow)
• Leadership training to help you succeed
• Mentoring Classes
• Role Model mentoring Sessions

OUTCOME - SUCCESS
• This project will create and sustain a minimum 55 new and growing small businesses to foster entrepreneurial communities in the city contributing $3.1 million dollars within 3-5 years.
### Budget

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<tr>
<th>Categories</th>
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<tr>
<td>a. Equipment</td>
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<td>b. Materials/Supplies</td>
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<td>c. Contractual</td>
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<td>d. Training Room/Office</td>
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Bilingual and Diversity Teacher and Leader Pipeline Programs

Mary Mélon-Tully, President and Chief Executive Officer
Oklahoma City Public Schools Foundation, Inc.
Our Mission

Our mission is to advance excellence, advocate for equity, and build strong community support for Oklahoma City Public Schools.

Who We Serve

- 63 schools serving 34,000 students & 6,100 teachers, support staff & administration
- 90% of student population is living at or below poverty line; more than 3,000 are experiencing homelessness
- Student population is 86% nonwhite; 18% of teacher workforce is racially and ethnically diverse; 34% of principal workforce is racially and ethnically diverse
- More than 75 different languages are spoken across the district; 41% primarily speak Spanish at home

Strategic Focus Areas

1. **Provide Innovative Teacher, Classroom & School Support**
2. **Recruit & Retain Urban-Ready Teachers & Leaders**
3. **Build Advocates for OKCPS**
WHY GROW YOUR OWN:

• Addresses the growing teacher and leader shortage
• Develops a diverse workforce that looks like the students we serve
• Proven model of success: High retention; builds socioeconomic status of graduates

OUR PIPELINE PROGRAMS:

• HS to Teacher Pipeline
• Bilingual Teacher Pipeline
• Diversity Teacher Pipeline
• Bilingual/Diversity Aspiring Administrators Pipeline

HOW THEY WORK:

PARTNERSHIPS
• UCO
• OCCC
• OSU-OKC
• ROSE STATE
• OKCPS

FUNDING
• TUITION
• FEES
• BOOKS

WRAP AROUND SERVICES
• TUTORING RESOURCES
• 1:1 SUPPORT TO ENCOURAGE SUCCESSFUL COMPLETION OF DEGREE
Thank you!

Arthur Elementary
Increase Access to and Acquisition of Needed Assistive Technology for Oklahomans with Disabilities

Natalie Rohwer, Director of Lending
Oklahoma Assistive Technology Foundation
OkAT is a 501(c) 3 non-profit organization in operation since 2001. OkAT became a certified **Community Development Financial Institution (CDFI)** in fall of 2019 serving a target market of individuals with disabilities with low-income.

OkAT’s **mission** is to promote community development through assisting Oklahomans with disabilities of all ages and their family members, guardians, advocates, authorized representatives, and other appropriate individuals or entities to increase understanding, access to and acquisition of assistive technology (AT) through financial loans, financial education, and other identified resources. We offer these lending services to provide financing options to individuals who are underrepresented in the financial markets.

**AT** is anything that helps a person with a disability do a task easier, better, faster, or more efficiently that might otherwise be difficult or impossible to do without it.

Request is for funds to support for Financial Loan Program and Device Reutilization Program to help individuals **get needed equipment.**
OkAT Financial Loan Program

OkAT works in partnership with Oklahoma ABLE Tech, the state’s Assistive Technology Act Program and BancFirst of Stillwater, to make loans to Oklahomans statewide to purchase needed AT to help them live, work, and learn independently.

Program offers a fixed 5% interest rate loan with flexible underwriting criteria and terms.

- AT loan can be repaid over a term of up to 60 months depending on AT purchased; no minimum or maximum
- Microloan has a maximum loan amount of $2,000 and can be repaid over a term of up to 36 months; additional credit criteria and debt to income flexibility
- Home accessibility modification maximum loan amount of $10,000 repaid over a maximum term of 7 years depending on modification
Device Reutilization Program

OkAT partners with Oklahoma ABLE Tech to provide AT and durable medical equipment (DME) to Oklahomans who otherwise might not be able to afford the needed equipment.

- Program collects donated, gently-used equipment (e.g. bath benches, blood pressure monitors, patient lifts, scooters, shower chairs, walkers, and manual and power wheelchairs) that is cleaned, sanitized and then reassigned for free to others in need.

- Based on FFY2022 program data, over 2,042 individuals were served through the Reutilization Program, by providing a total of 2,453 items for a total value of $355,144 across the state. 548 individuals could only afford the AT through this program and 1,494 responded that the items were only available through this program.

- Current waitlist has 400 individuals waiting for equipment.
Street Outreach for Tulsa County
Josh Sanders, Director of Outreach and Engagement
Housing Solutions Tulsa
Housing Solutions Outreach Team

- **Housing Focused**
  - Teams begin working on housing plans at first contact with clients

- **Responsive**
  - 7 days a week
  - Geographic zones across Tulsa County
  - Outreach request form available with follow up option
  - Established relationships with businesses and landlords

- **Holistic**
  - Team has 60% lived experience
  - Wrap around services, document retrieval and transportation are also part of case management
  - Coordination with multiple partners for better client outcomes
  - Ongoing relationship development and stabilization after housing placement

- **Agile**
  - Crisis mobilization for extreme weather events
  - Work with hospitals and behavioral health teams through client crisis
Data Driven Results

- 488 clients served in the last year; 1,002 clients served in the last two years
- 115 people living in unsheltered locations were moved directly into permanent housing
Our ask is $300,000 to continue this housing focused work.
Providing jobs for low- to moderate-income blind individuals

Damon Swift, Chief Operating Officer
Mark Ivy, Development Manager
NewView Oklahoma, Inc.
Manufacturing that changes lives.
WAREHOUSE PROJECT

35+ Jobs Created at $45K+ annual salary

$100M+ Revenue Opportunity

45k Sq Ft Warehouse
Sprinkler Suppression System
Freight Elevator, ADA Compliance
PROJECT COST BREAKDOWN

- Fire Suppression System - $750,000
- ADA Compliance - $1,000,000
- Warehouse Addition - $6,250,000
Funder Response Forms Evaluations

Share Your Connections!
Steve Shepelwich
Steven.Shepelwich@kc.frb.org
405-270-8675
Share Your Connections!

Investment Connection Website:
https://www.kansascityfed.org/community/investmentconnection

CRA OneSource Website:
https://www.kansascityfed.org/community/cdi/craonesource
Thank you for participating in Investment Connection Oklahoma!