



OAKRIDGE NEIGHBORHOOD AND NEIGHBORHOOD SERVICES
BOARD MEETING AGENDA
April 15, 2026

1. Call to Order / Chairs Report Skylar Mayberry-Mayes
2. Board Mission Moment Mike Hill
3. Approval of Consent Agenda Skylar Mayberry-Mayes
 - a. February Board Minutes
 - b. February Financials
4. New Business Deidre DeJear
 - a. Evelyn K. Davis Update
 - b. Mainframe Lot/Cynergy Development
 - c. Approval of Human Resources Charter Amendment
6. CEO Update Deidre DeJear
7. Committee Updates Diana Dubuisson
 - a. Finance Carol Bodensteiner
 - b. Marketing Emily LeMay
 - c. Development Emily LeMay
 - d. Governance Committee Albert Farr
 - e. Organizational Strategy Joyce McDanel
 - f. Human Resources Jamie Buelt
 - g. Housing & Services
8. Adjourn



Oakridge Neighborhood Board Meeting

February 18, 2026 - 7:30 am

Homes of Oakridge Human Services

Board Attendance:

Carol Bodensteiner, Jamie Buelt, Diana Dubuisson, Albert Farr, Nalo Johnson, Alex Markmann, Skylar Mayberry-Mayes, Joyce McDanel, Matthea Smith

Remote:

Jason Adams, Jessica Fenney, Sharon Gaddy-Hanna, Tim Haight, Mary Johnson, Kent Kramer, Erin Kuhl, Emily Lemay, Kuuku Saah, Deidre Williams, Jessica Zaugg

Absent:

Marcy, Baker, Sherri Hart, Mark Wiltse,

Staff Attendance:

Deidre DeJear, Almardi Abdalla, Lenny Bell, Kristin Clayton, Chris Irvine, Kristin Littlejohn, Pat Palmer, Sheri Fitzpatrick

I. Call to Order/Chairs Report

- a) Skylar Mayberry-Mayes called the meeting to order at 7:34 am

II. Consent Agenda Approval

- b) **Move:** Joyce McDanel **Second:** Albert Farr **Status:** Passed

III. Mission Moment

Jamie Buelt spoke on "There's no place like Oakridge"

IV. CEO Report

- a) Lenny Bell, VP of Youth and Education, started Monday, February 16. Great to have his leadership and experience. Bio in packet.
- b) Grant Season – currently applying for \$900,000 worth of grants
- c) Update On Evelyn K Davis Center opportunities
- d) Update on Mainframe Lot
- e) Legislative Day – please see insert
- f) Sponsorship Opportunities – please see insert
- g) Breakfast at Tiffany's – Mark your calendars for April 26th, 11 am – 1 pm at Willow on Grand



(CEO Report continued)

- h) Summer Youth Employment – funding for 35, aspire to have funding for 50 youth
- i) Variety Center room (elementary age) - modernization needed
- j) March 11 – Workforce Development Giveaway here at Oakridge Neighborhood – Donations appreciated

V. Committee Reports

a. Marketing	Carol Bodensteiner
b. Development	Emily LeMay
c. Organizational Strategy	Albert Farr
d. Housing & Services	Jaime Buelt
e. Governance Committee	Emily LeMay
f. Human Resources	Joyce McDanel

Meeting adjourned to Closed Session

Reminders: Next Board Meeting – April 15, 2026, at 7:30 am at Oakridge Neighborhood

Oakridge Neighborhood Services

Balance Sheet

	Current Period 02/28/2026	Prior Period 01/31/2026	Prior Year End 12/31/2025
Current Assets			
Operating Cash	140,160.24	114,736.64	119,013.85
Designated Cash	58,037.74	70,006.11	67,973.27
Account Receivables and Pledges	3,010,973.59	3,068,359.15	3,181,348.69
Due from Affiliate Entities	19,909.63	39,368.70	39,638.32
Prepaid Expense	11,680.00	19,548.65	31,417.31
Special Investment Fund - GDMCF	408,178.12	408,178.12	408,178.12
Wheels of Hope CD	40,993.90	40,993.90	40,993.90
Investment - Silver Oaks	219,933.00	219,933.00	219,933.00
Investment - ONS Ventures	1,360,414.00	1,360,414.00	1,360,414.00
Total Current Assets	5,270,280.22	5,341,538.27	5,468,910.46
Other Assets			
Housing Notes Receivable, Net of Allowance	3,703,758.00	3,703,758.00	3,703,758.00
Operating Lease Right-of-Use Assets, net	44,978.00	44,978.00	44,978.00
Total Other Assets	3,748,736.00	3,748,736.00	3,748,736.00
Fixed Assets			
Fixed Assets	3,038,037.91	3,038,037.91	3,038,037.91
Less: Accumulated Depreciation	(2,010,610.94)	(1,995,169.29)	(1,979,674.51)
Total Fixed Assets	1,027,426.97	1,042,868.62	1,058,363.40
TOTAL ASSETS	10,046,443.19	10,133,142.89	10,276,009.86
Current Liabilities			
Accounts Payable	27,541.09	26,913.59	37,607.43
Accrued Expenses	221,337.10	221,337.10	221,337.10
Deferred Revenue	33,674.83	33,674.83	33,674.83
Line of Credit	320,000.00	320,000.00	320,000.00
Total Current Liabilities	602,553.02	601,925.52	612,619.36
Long Term Liabilities			
Operating Lease Liabilities	46,097.00	46,097.00	46,097.00
Notes Payable	20,893.45	20,893.45	20,893.45
Total Long Term Liabilities	66,990.45	66,990.45	66,990.45
TOTAL LIABILITIES	669,543.47	668,915.97	679,609.81
Net Assets	9,376,899.72	9,464,226.92	9,596,400.05
TOTAL NET ASSETS	9,376,899.72	9,464,226.92	9,596,400.05
TOTAL LIABILITIES AND NET ASSETS	10,046,443.19	10,133,142.89	10,276,009.86
BEGINNING BALANCE WITH CURRENT YEAR ADJUSTMENTS	9,596,400.05	9,596,400.05	10,100,336.84
NET SURPLUS/(DEFICIT)	(219,500.33)	(132,173.13)	(503,936.79)
ENDING NET ASSETS	9,376,899.72	9,464,226.92	9,596,400.05

Oakridge Neighborhood Services

Income Statement - Comparative Summary

	Current Period			PY Period		Current Year-to-Date			Annual Bdgt	Prior YTD
	Actual 02/28/2026	Budget	Change Inc/(dec)	Actual 02/28/2025		Actual 02/28/2026	Budget	Change Inc/(dec)	2026	Actual 02/28/2025
REVENUE										
Rental Income	6,605.11	6,883.33	(278.22)	6,385.27		13,110.22	13,766.70	(656.48)	82,600.00	12,770.54
Contributions: Corp/Individual	11,069.28	5,366.67	5,702.61	10,854.09		47,607.87	166,733.30	(119,125.43)	246,400.00	37,499.83
Contributions: Board Giving	3,421.30	3,000.00	421.30	3,433.18		6,505.69	6,000.00	505.69	54,600.00	6,679.64
Grants & Subsidies	130,357.72	150,691.67	(20,333.95)	103,485.73		264,289.99	282,683.30	(18,393.31)	2,288,700.00	436,363.07
Interest & Investment Income	55.78	175.00	(119.22)	180.64		130.85	350.00	(219.15)	39,900.00	270.09
Program Fees & Tuition	46,311.84	57,600.00	(11,288.16)	41,408.15		88,494.16	115,200.00	(26,705.84)	833,150.00	76,168.40
Special Event Income	2,100.00	0.00	2,100.00	2,000.00		2,100.00	0.00	2,100.00	188,000.00	2,000.00
Management Fees	18,467.93	18,900.00	(432.07)	19,202.31		37,337.07	37,800.00	(462.93)	426,800.00	38,609.33
Other Income	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	0.00
TOTAL REVENUE	218,388.96	242,616.67	(24,227.71)	186,949.37		459,575.85	622,533.30	(162,957.45)	4,160,150.00	610,360.90
EXPENSES										
Salaries & Wages	191,059.19	186,510.00	4,549.19	180,746.85		389,396.62	373,010.00	16,386.62	2,535,320.00	367,279.26
Taxes & Benefits	47,110.94	46,485.00	625.94	44,667.32		96,930.10	95,970.00	960.10	593,600.00	82,651.59
Telephone & Utilities	6,564.60	5,125.00	1,439.60	6,882.96		12,721.70	10,250.00	2,471.70	61,500.00	12,667.25
Insurance	5,971.07	7,008.00	(1,036.93)	5,625.68		11,942.14	14,016.00	(2,073.86)	84,100.00	11,251.37
Repairs, Maintenance & Supplies	2,410.19	5,236.00	(2,825.81)	1,745.54		8,759.62	10,472.00	(1,712.38)	62,800.00	8,523.51
Program Services	10,778.35	14,220.00	(3,441.65)	16,200.62		24,683.88	28,440.00	(3,756.12)	208,600.00	32,313.29
Contract Services	14,481.32	16,552.00	(2,070.68)	9,405.03		80,955.46	78,437.00	2,518.46	252,700.00	44,866.10
Special Event Expenses	1,500.00	0.00	1,500.00	0.00		1,500.00	0.00	1,500.00	54,700.00	0.00
Marketing & Communications	1,751.41	2,109.00	(357.59)	1,538.70		4,021.04	4,668.00	(646.96)	25,750.00	16,130.66
Other General Admin	3,647.44	3,421.00	226.44	4,797.99		6,604.19	6,542.00	62.19	30,700.00	11,254.03
Audit & Tax Return Expense	5,000.00	5,000.00	0.00	610.00		10,625.00	5,000.00	5,625.00	53,500.00	610.00
TOTAL EXPENSES	290,274.51	291,666.00	(1,391.49)	272,220.69		648,139.75	626,805.00	21,334.75	3,963,270.00	587,547.06
CHANGE IN NET ASSETS BEFORE DEPRECIATION	(71,885.55)	(49,049.33)	(22,836.22)	(85,271.32)		(188,563.90)	(4,271.70)	(184,292.20)	196,880.00	22,813.84
Depreciation	(15,441.65)	(15,759.00)	317.35	(15,894.14)		(30,936.43)	(31,518.00)	581.57	(189,100.00)	(31,836.67)
CHANGE IN NET ASSETS - DEPRECIATION	(15,441.65)	(15,759.00)	317.35	(15,894.14)		(30,936.43)	(31,518.00)	581.57	(189,100.00)	(31,836.67)
NET SURPLUS (DEFICIT)	(87,327.20)	(64,808.33)	(22,518.87)	(101,165.46)		(219,500.33)	(35,789.70)	(183,710.63)	7,780.00	(9,022.83)

Contributions - Corp/Individual - Budgeted to receive \$130,000 from Urbans in January, will not receive until April

Grants & Subsidies - difference is primarily timing of when grants received vs when budgeted; have not yet been approved for Bravo grant \$5,000 which was received in January in 2025; received \$10,000 Athene grant for Tech Center that was not budgeted

Program Fees & Tuition - \$31,000 short of budget for Oak Academy tuition revenue, enrollment numbers have increased from beginning of year so hope to start seeing that impact in March

Salaries & Wages - Youth salaries are \$6,300 over budget; Oak salaries are \$9,600 overbudget

Youth - hours worked for various staff members were over budgeted amounts

Oak - includes \$8,000 bonuses paid with PCECI funding (not budgeted); remainder is primarily result of OT hours paid which were not included in budget

Audit & Tax Return - timing issue, expect total to match annual budget once the work is completed

Oakridge Neighborhood Assoc LP

Balance Sheet HUD

	Current Period 02/28/2026	Prior Period 01/31/2026	Prior Year End 12/31/2025
Current Assets			
Cash in Bank	748,894.29	720,054.78	703,986.43
Account Receivables	36,736.98	52,409.98	52,552.48
Prepaid Expense	0.00	14,721.78	32,293.55
Total Current Assets	785,631.27	787,186.54	788,832.46
Other Assets			
Real Estate Tax Escrow	213,983.88	201,233.88	188,483.88
Reserve for Replacement	699,475.91	691,912.96	684,350.01
Operating Reserves	453,352.03	452,125.60	450,000.00
Revenue Deficit Reserves	313,297.12	312,443.94	310,958.07
Deferred Loan & Compliance Fees	23,031.47	23,708.80	24,386.13
Total Other Assets	1,703,140.41	1,681,425.18	1,658,178.09
Fixed Assets			
Fixed Assets	15,774,908.53	15,774,908.53	15,774,908.53
Less: Accumulated Depreciation	(11,719,111.10)	(11,702,431.77)	(11,690,657.06)
Total Fixed Assets	4,055,797.43	4,072,476.76	4,084,251.47
TOTAL ASSETS	6,544,569.11	6,541,088.48	6,531,262.02
Current Liabilities			
Accounts Payable	19,755.14	18,996.45	18,470.93
Due to ONS	3,550.71	11,649.36	11,747.61
Accrued Expenses	1,679,635.50	1,658,891.88	1,638,148.26
Tenant Security Deposits	38,441.00	38,441.00	37,473.00
Total Current Liabilities	1,741,382.35	1,727,978.69	1,705,839.80
Long Term Liabilities			
Flex Subsidy Loans	1,154,259.82	1,153,338.08	1,152,416.34
Notes Payable	6,361,046.55	6,362,284.15	6,363,513.81
Total Long Term Liabilities	7,515,306.37	7,515,622.23	7,515,930.15
TOTAL LIABILITIES	9,256,688.72	9,243,600.92	9,221,769.95
General Partner Capital - Newbury	(1,451,026.68)	(1,451,026.68)	(1,451,026.68)
General Partner Capital - ONS	(771,700.81)	(771,700.81)	(771,700.81)
Syndication Fees	(129,818.00)	(129,818.00)	(129,818.00)
Net Assets	(359,574.12)	(349,966.95)	(337,962.44)
TOTAL NET ASSETS	(2,712,119.61)	(2,702,512.44)	(2,690,507.93)
TOTAL LIABILITIES AND NET ASSETS	6,544,569.11	6,541,088.48	6,531,262.02

Oakridge Neighborhood Assoc LP

Income Statement - Comparative Summary

	Current Period			PY Period Actual 02/28/2025	Current Year-to-Date			Annual Bdgt 2026	Prior YTD Actual 02/28/2025
	Actual	Budget	Change		Actual	Budget	Change		
	02/28/2026		Inc/(dec)		02/28/2026		Inc/(dec)		
REVENUE									
Tenant Rent Revenue	45,014.00	47,911.00	(2,897.00)	43,305.00	88,657.00	95,822.00	(7,165.00)	574,933.00	86,033.00
HUD Rent Subsidy	91,793.00	98,313.00	(6,520.00)	103,146.00	190,178.00	196,626.00	(6,448.00)	1,179,765.00	201,777.00
Interest & Investment Income	2,081.91	4,051.00	(1,969.09)	2,216.62	5,695.71	8,102.00	(2,406.29)	48,612.00	4,840.36
Other Income	24,343.24	50.00	24,293.24	32,465.38	24,352.24	100.00	24,252.24	600.00	32,465.38
TOTAL REVENUE	163,232.15	150,325.00	12,907.15	181,133.00	308,882.95	300,650.00	8,232.95	1,803,910.00	325,115.74
EXPENSES									
Salaries & Wages	43,252.17	47,205.00	(3,952.83)	42,541.27	86,708.17	94,410.00	(7,701.83)	613,673.00	83,328.32
Taxes & Benefits	12,149.91	11,595.00	554.91	11,250.76	21,430.40	23,188.00	(1,757.60)	143,719.00	21,328.92
Rent Expense	2,730.00	2,556.00	174.00	2,482.00	5,460.00	5,112.00	348.00	30,678.00	4,964.00
Communications & Utilities	15,749.37	14,373.00	1,376.37	13,132.51	30,084.00	28,744.00	1,340.00	172,456.00	26,373.24
Insurance	13,765.69	14,051.00	(285.31)	10,683.28	27,531.39	28,102.00	(570.61)	168,603.00	21,366.56
Real Estate Taxes	7,050.00	7,034.00	16.00	7,650.00	14,100.00	14,068.00	32.00	84,416.00	15,300.00
Office & Security Supplies	272.71	1,567.00	(1,294.29)	686.32	1,711.49	3,134.00	(1,422.51)	18,820.00	2,846.33
Maintenance, Supplies & Repairs	24,926.45	17,803.00	7,123.45	18,296.72	37,932.71	35,606.00	2,326.71	213,660.00	34,236.28
Professional/Contract Services	19,073.21	18,706.00	367.21	17,184.08	42,507.07	40,262.00	2,245.07	227,299.00	45,158.41
Other Admin Expense	703.80	580.00	123.80	396.56	969.06	1,160.00	(190.94)	6,976.00	715.83
Audit Expense	0.00	0.00	0.00	11,975.00	625.00	0.00	625.00	15,408.00	11,975.00
Interest Expense	3,043.57	3,100.00	(56.43)	3,313.05	6,095.08	6,200.00	(104.92)	37,200.00	6,455.98
TOTAL EXPENSES	142,716.88	138,570.00	4,146.88	139,591.55	275,154.37	279,986.00	(4,831.63)	1,732,908.00	274,048.87
CHANGE IN NET ASSETS BEFORE DEPRECIATION	20,515.27	11,755.00	8,760.27	41,541.45	33,728.58	20,664.00	13,064.58	71,002.00	51,066.87
NON-OPERATING EXPENSES									
Depreciation Expense	(16,679.33)	(14,662.00)	(2,017.33)	(63,642.06)	(28,454.04)	(29,324.00)	869.96	(175,944.00)	(129,383.66)
Interest Expense	(13,443.11)	(12,900.00)	(543.11)	(12,900.32)	(26,886.22)	(25,800.00)	(1,086.22)	(154,800.00)	(25,800.64)
	(30,122.44)	(27,562.00)	(2,560.44)	(76,542.38)	(55,340.26)	(55,124.00)	(216.26)	(330,744.00)	(155,184.30)
CHANGE IN NET ASSETS - DEPRECIATION	(30,122.44)	(27,562.00)	(2,560.44)	(76,542.38)	(55,340.26)	(55,124.00)	(216.26)	(330,744.00)	(155,184.30)
NET SURPLUS (DEFICIT)	(9,607.17)	(15,807.00)	6,199.83	(35,000.93)	(21,611.68)	(34,460.00)	12,848.32	(259,742.00)	(104,117.43)

Vacancies 14 9%
 3 Efficiency; 3 Two Bedrooms; 6 Three Bedrooms; 2 Four Bedrooms

Other income - includes insurance claim reimbursement on fire units (March will include \$70,000 expense to contractor on those units)

Oakridge Neighborhood Assoc Phase II LP

Balance Sheet HUD

	Current Period 02/28/2026	Prior Period 01/31/2026	Prior Year End 12/31/2025
Current Assets			
Cash in Bank	935,898.15	953,519.54	954,239.10
Account Receivables	22,271.00	17,985.90	15,840.00
Prepaid Expense	0.00	14,721.79	32,293.55
Total Current Assets	958,169.15	986,227.23	1,002,372.65
Other Assets			
Real Estate Tax Escrow	225,974.00	215,969.00	205,964.00
Reserve for Replacement	623,330.59	615,767.64	608,204.69
Operating Reserves	453,786.73	452,559.18	450,000.00
Revenue Deficit Reserves	303,530.95	302,704.31	300,968.25
Deferred Loan & Compliance Fees	21,987.10	22,633.81	23,280.52
Total Other Assets	1,628,609.37	1,609,633.94	1,588,417.46
Fixed Assets			
Fixed Assets	15,968,079.10	15,968,079.10	15,968,079.10
Less: Accumulated Depreciation	(11,936,898.94)	(11,919,928.81)	(11,906,688.08)
Total Fixed Assets	4,031,180.16	4,048,150.29	4,061,391.02
TOTAL ASSETS	6,617,958.68	6,644,011.46	6,652,181.13
Current Liabilities			
Accounts Payable	19,727.61	21,436.45	20,854.39
Due to ONS	1,377.17	12,116.78	12,396.03
Accrued Expenses	2,330,981.40	2,309,496.63	2,288,011.86
Tenant Security Deposits	39,150.00	39,560.00	40,299.00
Total Current Liabilities	2,391,236.18	2,382,609.86	2,361,561.28
Long Term Liabilities			
Flex Subsidy Loans	1,351,914.38	1,350,825.13	1,349,735.88
Notes Payable	6,416,400.30	6,417,698.35	6,418,988.07
Total Long Term Liabilities	7,768,314.68	7,768,523.48	7,768,723.95
TOTAL LIABILITIES	10,159,550.86	10,151,133.34	10,130,285.23
General Partner Capital - Newbury	(1,783,499.16)	(1,783,499.16)	(1,783,499.16)
General Partner Capital - ONS	(1,102,610.71)	(1,102,610.71)	(1,102,610.71)
Syndication Fees	(100,072.00)	(100,072.00)	(100,072.00)
Net Assets	(555,410.31)	(520,940.01)	(491,922.23)
TOTAL NET ASSETS	(3,541,592.18)	(3,507,121.88)	(3,478,104.10)
TOTAL LIABILITIES AND NET ASSETS	6,617,958.68	6,644,011.46	6,652,181.13

Oakridge Neighborhood Assoc Phase II LP

Income Statement - Comparative Summary

	Current Period			PY Period Actual 02/28/2025	Current Year-to-Date			Annual Bdgt 2026	Prior YTD Actual 02/28/2025
	Actual	Budget	Change		Actual	Budget	Change		
	02/28/2026		Inc/(dec)		02/28/2026		Inc/(dec)		
REVENUE									
Tenant Rent Revenue	41,131.00	43,192.00	(2,061.00)	48,561.00	80,429.00	86,383.00	(5,954.00)	518,293.00	99,158.00
HUD Rent Subsidy	89,835.00	93,829.00	(3,994.00)	93,158.00	188,928.00	187,658.00	1,270.00	1,125,940.00	184,484.00
Interest & Investment Income	2,057.89	4,393.00	(2,335.11)	2,555.89	6,357.23	8,786.00	(2,428.77)	52,717.00	5,486.47
Other Income	26.00	0.00	26.00	166.00	37.00	0.00	37.00	0.00	267.00
TOTAL REVENUE	133,049.89	141,414.00	(8,364.11)	144,440.89	275,751.23	282,827.00	(7,075.77)	1,696,950.00	289,395.47
EXPENSES									
Salaries & Wages	43,756.86	47,684.00	(3,927.14)	43,381.26	87,645.31	95,368.00	(7,722.69)	619,883.00	84,775.23
Taxes & Benefits	12,230.84	11,688.00	542.84	11,490.08	22,508.68	23,375.00	(866.32)	144,921.00	21,658.99
Rent Expense	2,730.00	2,556.00	174.00	2,482.00	5,460.00	5,112.00	348.00	30,678.00	4,964.00
Communications & Utilities	13,915.47	14,998.00	(1,082.53)	12,823.47	27,978.82	29,996.00	(2,017.18)	179,966.00	26,374.83
Insurance	13,765.69	14,051.00	(285.31)	10,683.28	27,531.38	28,102.00	(570.62)	168,603.00	21,366.56
Real Estate Taxes	2,750.00	2,728.00	22.00	3,190.00	5,500.00	5,457.00	43.00	32,737.00	6,380.00
Office & Security Supplies	427.58	1,625.00	(1,197.42)	895.24	2,021.21	3,250.00	(1,228.79)	19,530.00	3,289.06
Maintenance, Supplies & Repairs	20,275.29	17,303.00	2,972.29	13,096.98	43,867.85	34,606.00	9,261.85	207,660.00	29,291.06
Professional/Contract Services	18,178.37	18,171.00	7.37	16,513.25	41,272.20	39,193.00	2,079.20	220,901.00	43,030.59
Other Admin Expense	706.29	661.00	45.29	106.93	991.51	1,322.00	(330.49)	7,940.00	477.48
Audit Expense	0.00	0.00	0.00	13,175.00	625.00	0.00	625.00	15,409.00	13,175.00
Interest Expense	3,214.07	3,244.00	(29.93)	3,304.38	6,427.29	6,487.00	(59.71)	38,920.00	6,619.40
TOTAL EXPENSES	131,950.46	134,709.00	(2,758.54)	131,141.87	271,829.25	272,268.00	(438.75)	1,687,148.00	261,402.20
CHANGE IN NET ASSETS BEFORE DEPRECIATION	1,099.43	6,705.00	(5,605.57)	13,299.02	3,921.98	10,559.00	(6,637.02)	9,802.00	27,993.27
NON-OPERATING EXPENSES									
Depreciation Expense	(16,970.13)	(20,765.00)	3,794.87	(64,399.32)	(30,210.86)	(41,530.00)	11,319.14	(249,173.00)	(131,885.18)
Interest Expense	(18,599.60)	(17,802.00)	(797.60)	(17,803.36)	(37,199.20)	(35,604.00)	(1,595.20)	(213,640.00)	(35,606.72)
	(35,569.73)	(38,567.00)	2,997.27	(82,202.68)	(67,410.06)	(77,134.00)	9,723.94	(462,813.00)	(167,491.90)
CHANGE IN NET ASSETS - DEPRECIATION	(35,569.73)	(38,567.00)	2,997.27	(82,202.68)	(67,410.06)	(77,134.00)	9,723.94	(462,813.00)	(167,491.90)
NET SURPLUS (DEFICIT)	(34,470.30)	(31,862.00)	(2,608.30)	(68,903.66)	(63,488.08)	(66,575.00)	3,086.92	(453,011.00)	(139,498.63)

Vacancies 17 11%
 1 Efficiency; 1 One Bedroom; 5 Two Bedrooms; 9 Three Bedrooms; 1 Four Bedrooms

Silver Oaks Associates, LP

Balance Sheet HUD

	Current Period 02/28/2026	Prior Period 01/31/2026	Prior Year End 12/31/2025
Current Assets			
Cash in Bank	25,397.89	22,440.74	19,418.10
Account Receivables	827.63	112.63	695.63
Prepaid Expense	0.00	4,629.80	10,819.60
Total Current Assets	26,225.52	27,183.17	30,933.33
Other Assets			
Reserve for Replacement	140,678.38	139,261.57	137,843.13
Operating Reserves	133,370.21	133,344.64	133,317.25
Deferred Loan & Compliance Fees	17,985.91	18,070.35	18,154.79
Total Other Assets	292,034.50	290,676.56	289,315.17
Fixed Assets			
Fixed Assets	6,609,465.86	6,609,465.86	6,609,465.86
Less: Accumulated Depreciation	(2,545,731.06)	(2,529,241.38)	(2,512,751.66)
Total Fixed Assets	4,063,734.80	4,080,224.48	4,096,714.20
TOTAL ASSETS	4,381,994.82	4,398,084.21	4,416,962.70
Current Liabilities			
Accounts Payable	19,206.94	7,196.93	5,608.22
Due to ONS	2,287.75	2,908.56	2,800.68
Accrued Expenses	173,370.29	171,377.18	169,090.07
Tenant Security Deposits	8,000.00	8,000.00	8,200.00
Total Current Liabilities	202,864.98	189,482.67	185,698.97
Long Term Liabilities			
Notes Payable	860,617.93	861,563.60	862,509.27
Total Long Term Liabilities	860,617.93	861,563.60	862,509.27
TOTAL LIABILITIES	1,063,482.91	1,051,046.27	1,048,208.24
Limited Partner Capital - NEF	3,383,331.00	3,383,331.00	3,383,331.00
General Partner Capital - Newbury	(55.04)	(55.04)	(55.04)
General Partner Capital - ONS	219,933.95	219,933.95	219,933.95
Syndication Fees	(36,480.00)	(36,480.00)	(36,480.00)
Net Assets	(248,218.00)	(219,691.97)	(197,975.45)
TOTAL NET ASSETS	3,318,511.91	3,347,037.94	3,368,754.46
TOTAL LIABILITIES AND NET ASSETS	4,381,994.82	4,398,084.21	4,416,962.70

Silver Oaks Associates, LP

Income Statement - Comparative Summary

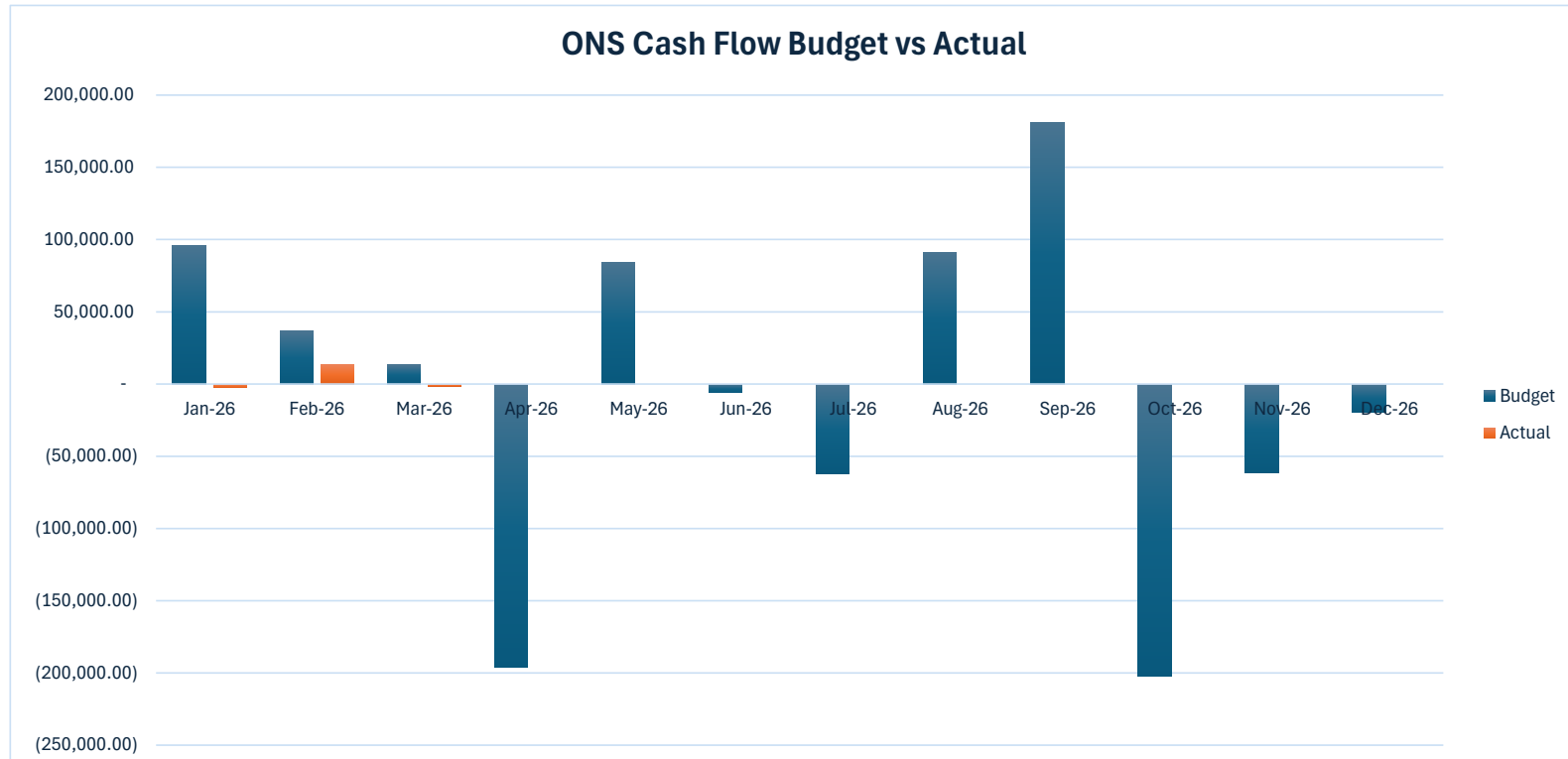
	Current Period			PY Period Actual 02/28/2025	Current Year-to-Date			Annual Bdgt 2026	Prior YTD Actual 02/28/2025
	Actual	Budget	Change Inc/(dec)		Actual	Budget	Change Inc/(dec)		
	02/28/2026				02/28/2026				
REVENUE									
Tenant Rent Revenue	29,324.00	31,816.00	(2,492.00)	29,961.00	58,551.00	63,632.00	(5,081.00)	381,796.00	59,041.00
Interest & Investment Income	53.82	57.00	(3.18)	50.66	111.21	115.00	(3.79)	685.00	106.70
Other Income	25.00	5.00	20.00	0.00	425.00	10.00	415.00	50.00	50.00
TOTAL REVENUE	29,402.82	31,878.00	(2,475.18)	30,011.66	59,087.21	63,757.00	(4,669.79)	382,531.00	59,197.70
EXPENSES									
Salaries & Wages	4,937.02	5,066.00	(128.98)	4,764.97	9,773.93	10,132.00	(358.07)	65,852.00	8,969.37
Taxes & Benefits	1,525.40	1,509.00	16.40	1,428.57	3,039.50	3,018.00	21.50	18,758.00	2,710.14
Rent Expense	1,045.11	1,052.00	(6.89)	1,021.27	2,090.22	2,104.00	(13.78)	12,620.00	2,042.54
Communications & Utilities	6,013.09	6,233.00	(219.91)	6,992.95	12,297.96	12,466.00	(168.04)	74,775.00	13,450.71
Insurance	4,416.60	4,679.00	(262.40)	3,325.60	8,833.19	9,358.00	(524.81)	56,142.00	6,651.20
Real Estate Taxes	520.00	517.00	3.00	405.00	1,040.00	1,034.00	6.00	6,198.00	810.00
Office & Security Supplies	5.79	309.00	(303.21)	108.19	257.17	618.00	(360.83)	3,700.00	840.70
Maintenance, Supplies & Repairs	2,162.33	4,217.00	(2,054.67)	1,764.10	9,654.61	8,434.00	1,220.61	50,580.00	5,653.58
Professional/Contract Services	3,869.77	4,314.00	(444.23)	3,898.22	11,328.76	10,188.00	1,140.76	53,302.00	10,534.85
Other Admin Expense	282.12	267.00	15.12	262.60	501.14	534.00	(32.86)	3,200.00	477.47
Audit Expense	16,415.00	0.00	16,415.00	7,025.00	17,040.00	0.00	17,040.00	10,395.00	7,025.00
Interest Expense	84.44	85.00	(0.56)	84.44	168.88	170.00	(1.12)	1,020.00	168.88
TOTAL EXPENSES	41,276.67	28,248.00	13,028.67	31,080.91	76,025.36	58,056.00	17,969.36	356,542.00	59,334.44
CHANGE IN NET ASSETS BEFORE DEPRECIATION	(11,873.85)	3,630.00	(15,503.85)	(1,069.25)	(16,938.15)	5,701.00	(22,639.15)	25,989.00	(136.74)
NON-OPERATING EXPENSES									
Depreciation Expense	(16,489.68)	(16,417.00)	(72.68)	(16,545.47)	(32,979.40)	(32,834.00)	(145.40)	(197,000.00)	(33,090.96)
Interest Expense	(162.50)	(163.00)	0.50	(162.50)	(325.00)	(326.00)	1.00	(1,950.00)	(325.00)
	(16,652.18)	(16,580.00)	(72.18)	(16,707.97)	(33,304.40)	(33,160.00)	(144.40)	(198,950.00)	(33,415.96)
CHANGE IN NET ASSETS - DEPRECIATION	(16,652.18)	(16,580.00)	(72.18)	(16,707.97)	(33,304.40)	(33,160.00)	(144.40)	(198,950.00)	(33,415.96)
NET SURPLUS (DEFICIT)	(28,526.03)	(12,950.00)	(15,576.03)	(17,777.22)	(50,242.55)	(27,459.00)	(22,783.55)	(172,961.00)	(33,552.70)

Vacancies 3 8%
2 One Bedroom; 1 Two Bedrooms

Audit Expense - February includes final billing on audit and tax return - budgeted to be in March, did have significant increase from PY for switch in firms

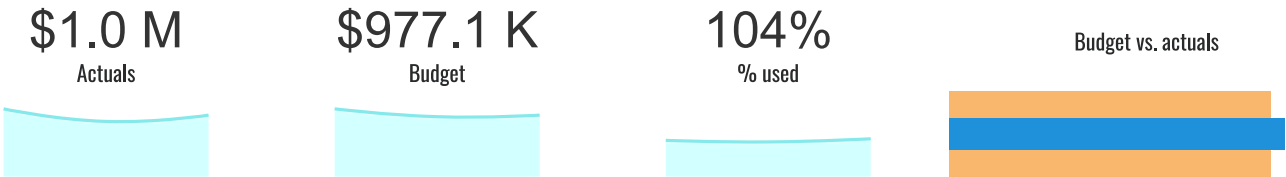
ONS Cash Flow Budget vs Actual

	Jan-26	Feb-26	Mar-26	Apr-26	May-26	Jun-26	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26
Budget	96,000.00	36,500.00	13,200.00	(196,100.00)	84,200.00	(6,100.00)	(61,800.00)	91,200.00	180,700.00	(202,300.00)	(61,600.00)	(19,700.00)
Actual	(2,244.37)	13,469.98	(1,323.89)									

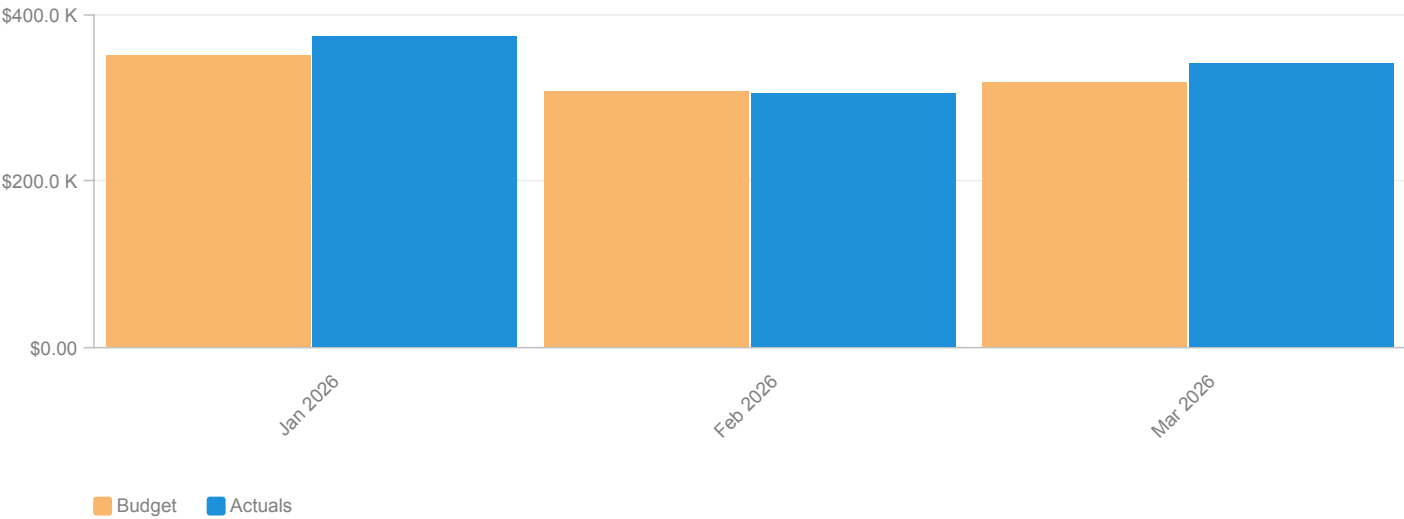


POST DATE	POST STATUS	ENCUMBRANCE	
Jan 1 2026 - Mar 31 2026	All	All	
BUDGET SCENARIO	ACCOUNT CATEGORY	ACCOUNT SEGMENT	ACCOUNT SEGMENT VALUE
ONS - BUDGET	Expense	Account code	All
ACCOUNT CLASS	ACCOUNT STATUS	ACCOUNT DESCRIPTION	ACCOUNT NUMBER
All	All	All	All

Summary i

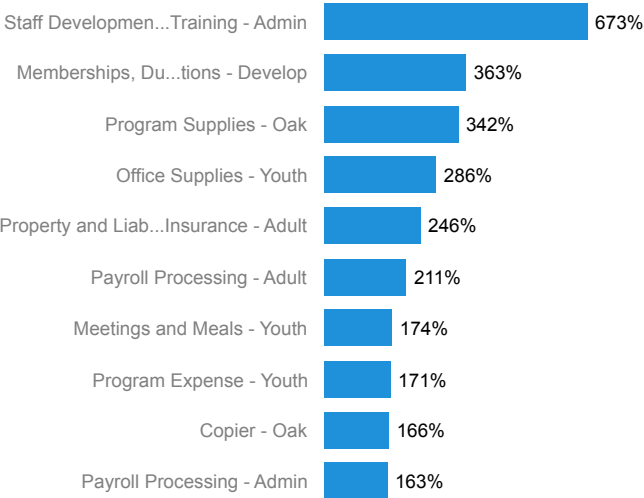


Budget vs. actuals i

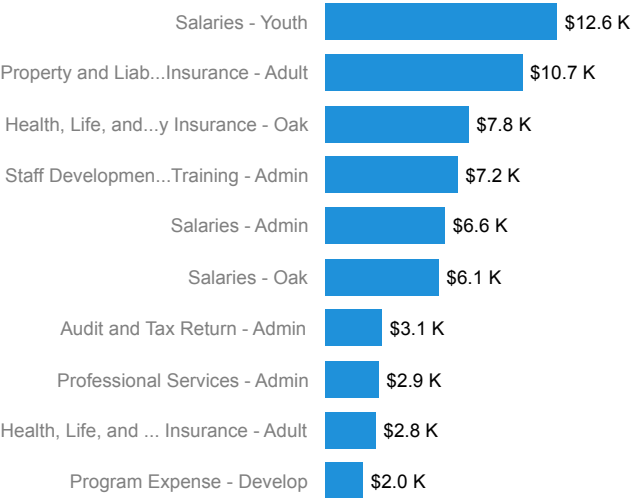


i Click on distinct Budget or Actual bars to drill into more details.

TOP 10 accounts by % used i



TOP 10 accounts by variance i



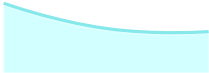
POST DATE	POST STATUS	ENCUMBRANCE	
Jan 1 2026 - Mar 31 2026	All	All	
BUDGET SCENARIO	ACCOUNT CATEGORY	ACCOUNT SEGMENT	ACCOUNT SEGMENT VALUE
ONS - BUDGET	Revenue	Account code	All
ACCOUNT CLASS	ACCOUNT STATUS	ACCOUNT DESCRIPTION	ACCOUNT NUMBER
All	All	All	All

Summary i

\$643.5 K
Actuals



\$848.6 K
Budget



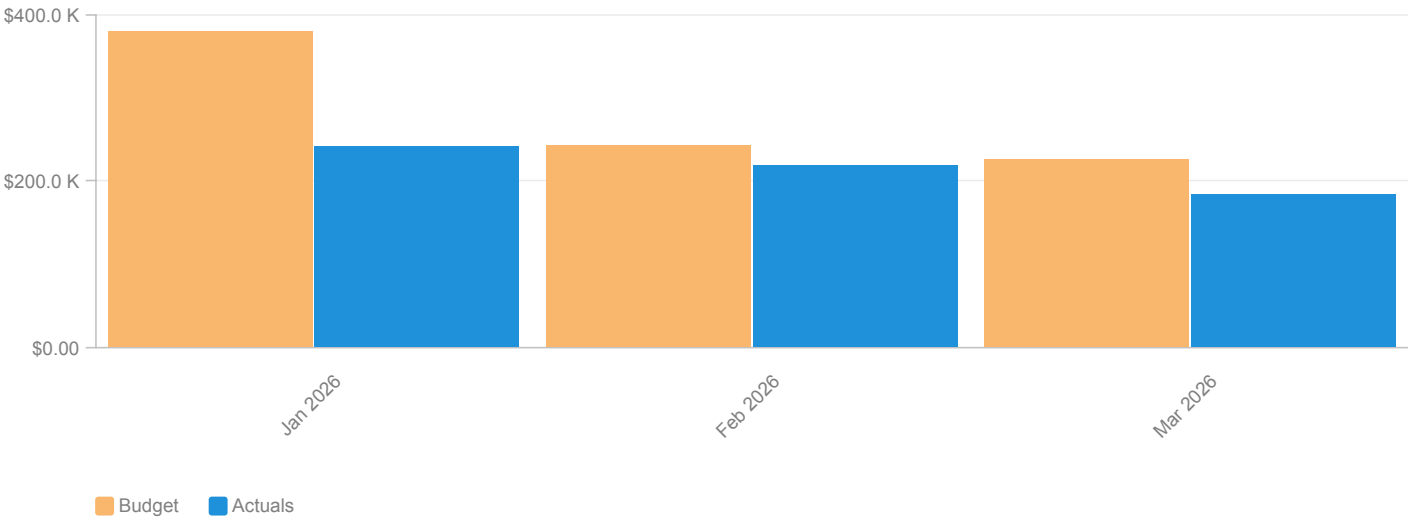
76%
% used



Budget vs. actuals

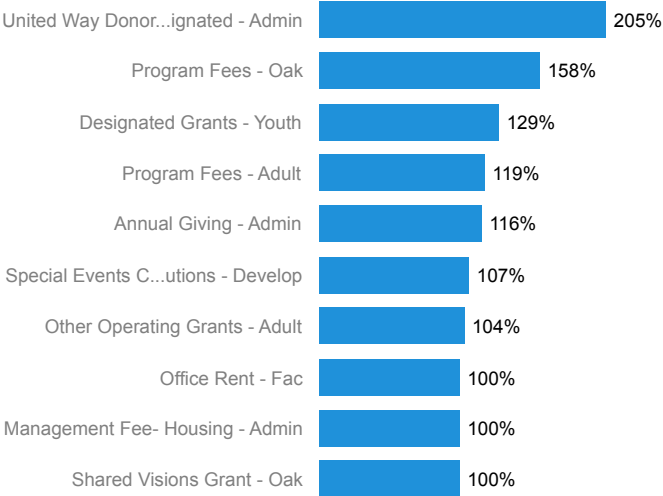


Budget vs. actuals i

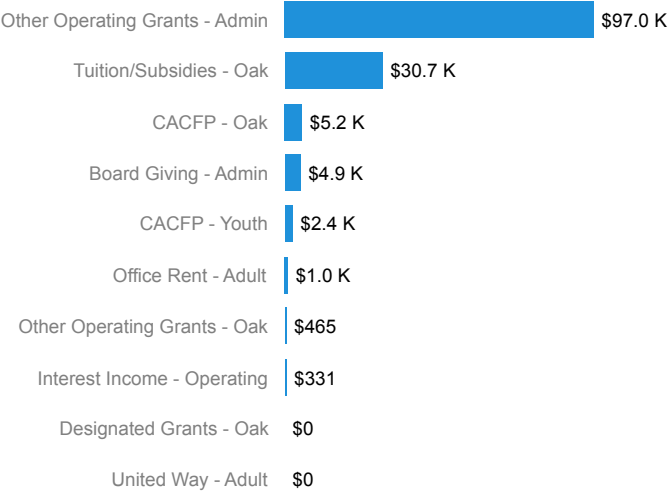


i Click on distinct Budget or Actual bars to drill into more details.

TOP 10 accounts by % used i



TOP 10 accounts by variance i



Estimated Surplus Cash Calculation

	Phase I
Cash (operating and security deposits)	703,986.43
Accounts Receivable - HUD	4,017.00
Total Cash	<u>708,003.43</u>
Accrued Mortgage interest payable	2,868.59
Accounts payable - 30 days	30,218.54
Prepaid revenue	5,337.00
Tenant Security Deposit liability	37,473.00
Accrued expenses (not escrowed)	49,856.51
Accounts payable - HUD	-
Total Current Obligations	<u>125,753.64</u>
Surplus Cash (Deficiency)	582,249.79

Use of Surplus Cash:

LP for permanent reduction in tax credits	-
Asset management fee	-
Interest on HOME funds	10,500.00
Operating reserve funding to meet requirement	-
Principal and interest on LP loans	125,000.00
Unpaid Developer Fee	-
HUD Flex subsidy note payment, up to \$70,724	70,724.00
TCAP note payment, up to 50% of remaining balance	188,012.90
HUD Flex subsidy note payment, up to 50% of remaining balance	94,006.45
Seller loan note payments or hold for reserves	94,006.45
Principal and interest on GP loans	-
GP to repay loans to cover operating deficits	-
Partnership management fees	-
GP - based on ownership %	-
LP - based on ownership %	-
	<u>582,249.79</u>

Estimated Surplus Cash Calculation

	Phase II
Cash (operating and security deposits)	954,239.10
Accounts Receivable - HUD	6,618.00
Total Cash	<u>960,857.10</u>
Accrued Mortgage interest payable	3,008.75
Accounts payable - 30 days	33,250.42
Prepaid revenue	6,497.00
Tenant Security Deposit liability	40,299.00
Accrued expenses (not escrowed)	54,565.02
Accounts payable - HUD	-
Total Current Obligations	<u>137,620.19</u>
Surplus Cash (Deficiency)	823,236.91

Use of Surplus Cash:

LP for permanent reduction in tax credits	-
Asset management fee	-
Interest on HOME funds	10,500.00
Operating reserve funding to meet requirement	-
Principal and interest on LP loans	125,000.00
Unpaid Developer Fee	-
HUD Flex subsidy note payment, up to \$70,998	70,998.00
TCAP note payment, up to 50% of remaining balance	308,369.46
HUD Flex subsidy note payment, up to 50% of remaining balance	154,184.73
Seller loan note payments or hold for reserves	154,184.73
Principal and interest on GP loans	-
GP to repay loans to cover operating deficits	-
Partnership management fees	-
GP - based on ownership %	-
LP - based on ownership %	-
	<u>823,236.91</u>




One Economy
Building Opportunity for All

Regional Economic Mobility Model (EKDC Proposal)

1

Introductions





Dr. Marvin DeJear
Board Chair
The Directors Council



Dr. Ahmed Agyeman
Consultant
Adult Education & Career Pathways



Cameron Nicholson
CEO
YMCA of Greater Des Moines



Janice Lane Schroeder
CEO
Children & Families of Iowa



Delidre DeJear
President & CEO
Oakridge Neighborhood



Jerrika Marshall
Executive Director
The Directors Council

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Mission & History



Founded in 2004 to align resources and leadership to address economic disparities and strengthen community outcomes.

Mission
As a coalition of leaders, The Directors Council seeks to improve the conditions of the individuals in the neighborhoods we serve. We pool our collective expertise to develop programs and launch unique **initiatives** that meet unaddressed needs.

Key Initiatives



African American Leadership Academy
Our voices. Our future.



One Economy
Building Opportunity for All



ONE ECONOMY
Financial Development Corp
Empowering Underserved Communities

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BOARD OF DIRECTORS





Treasurer
D'Angelo Johnson
McWestOne Bank



Ahmed Agyeman, Ph.D.
Consultant Adult Education & Career Pathways



Cameron Nicholson
Greater Des Moines YMCA



Janice Lane Schroeder, LMSW
Children & Families of Iowa



Betty Andrews
Betty Andrews Media



Chair
Marvin DeJear, Ph.D., MBA
DeJear Corporation



Vice Chair
Nalo Johnson, Ph.D.
Mid-Iowa Health Foundation



Malcolm Hankins, MA
City of Keokuk



Mary L. Wells
Polk County Treasurer



Erick Pruitt, Ed.D.
Ankeny Community School District



Delidre DeJear
Oakridge Neighborhood

4

Key Accomplishments















- From our Small Business programming, staffing and innovation efforts we have impacted over 500 small businesses via the Master Business Bootcamp and Non-Profit Bootcamps.
- Helped over 5000 individuals improve their financial education and assets

9

Inclusive Economic Opportunity



- One Economy for ALL communities
- Our Collaborative partners serve the entire community
- We encouraged and supported the development of the Latin X report
- Support One Voice and their programming and events

10

Transition and Strategy Committee Leads



Marvin DeJear, Ph.D., MBA
Founding director and architect of the Evelyn K. Davis Center



Ahmed Agyeman, Ph.D.
Former director of the Evelyn K. Davis Center



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Integrated Implementation Partners



Cameron Nicholson
President & CEO, YMCA of Greater Des Moines

Services Offered:

- Youth leadership development and mentorship
- Health and wellness programming for families
- Community based youth development programs
- Permanent supportive housing pathways

Community Impact:

- Serves 30,000 to 40,000 individuals annually across Central Iowa programs
- Provides thousands of youth development experiences each year through afterschool, sports, and leadership programs
- Operates multiple community facilities across the metro providing health, wellness, and youth services
- Serves 140 people who call the YMCA supportive housing home




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Integrated Implementation Partners



Janice Lane Schroeder

CEO, Children & Families of Iowa

Services Offered:

- Trauma informed counseling and behavioral health services
- Family stabilization and case management
- Affordable childcare access and family support programs

Community Impact:

- Serves 20,000+ children and families annually across Iowa
- 3000+ impacted by behavioral health and trauma informed counseling services statewide
- Operates multiple programs supporting child welfare, early childhood, and family stabilization
- Delivers thousands of counseling and support sessions each year for vulnerable families



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Integrated Implementation Partners



Deidre DeJear

President & CEO, Oakridge Neighborhood

Services Offered:

- Stable affordable housing for families
- Early childhood education through Oak Academy
- Youth engagement & workforce readiness programs
- Adult & Family services with multilingual staff support
- Oak Solutions | Organizational and Program Management

Community Impact:

- 339 affordable housing units providing stability for low income families
- 800+ residents living on campus in Des Moines' urban core
- 2500+ individuals served annually through housing and wraparound services
- 249 job placements in 2025, estimated \$9 million wage impact
- 36 pathway to homeownership enrollments, 8 purchased homes



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TDC is the organization
that **unites the leaders**
representing Central Iowa's
largest service-based entities.



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Why Evelyn K. Davis Center for Working Families



- More than a decade of collaboration with EKDC
- Leadership alignment across organizations
- Implementation Partner
- Supported financial empowerment programs
- Helped secure Bloomberg Financial Empowerment Center
- Invested in program sustainability and innovation

\$550,000

TDC direct investment over the past 10 years.

\$1,000,000+

Additional funds generated over the past 6 years

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Mission Alignment with EKDC



Our Mission alignment is highlighted by the following:

- Both organizations are committed to **empowerment through access and coordinated support**, ensuring individuals and families can achieve sustainable employment and economic stability
- EKDC provides the **front door and service experience**, while TDC ensures those services are **integrated, aligned, and scalable across systems**
- Both organizations are built on a **collaborative model**, recognizing that no single organization can meet all community needs alone
- Both organizations are committed to **equity, inclusion, and culturally responsive practices**, ensuring services reach those most impacted by systemic barriers

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Commitment to EKDC model



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One Economy Vision for the Future of EKDC



Under the Direction of The Directors Council:

- Evelyn K. Davis Center will be a flagship of a regional economic mobility hub for Central Iowa
- ALL** communities will be served using an inclusive approach
- We will support our staff with a competitive and comprehensive wage and benefits package
- We will invest in strengthening systems that support shared prosperity
- We are committed to long-term sustainability and dual-generational impact.

Evelyn K. Davis is here to thrive!

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The One Economy Vision Service Alignment

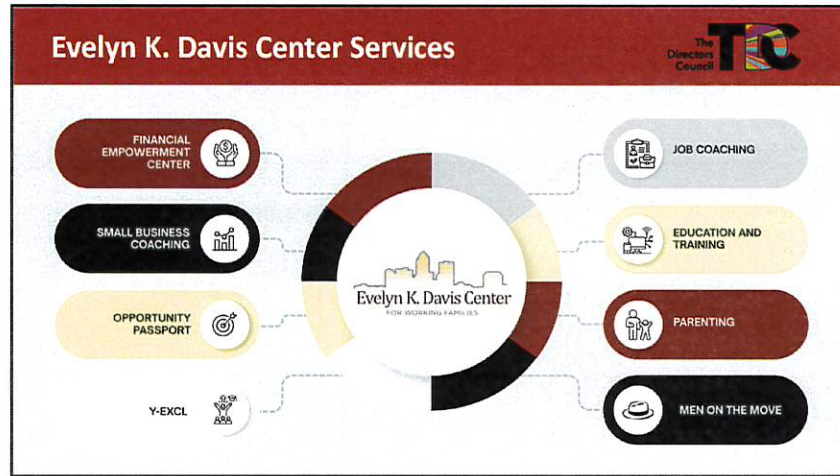
ONE ECONOMY 2.0 FRAMEWORK
TRANSFORMATIVE IMPACT
Accelerating Action on the OE Agenda



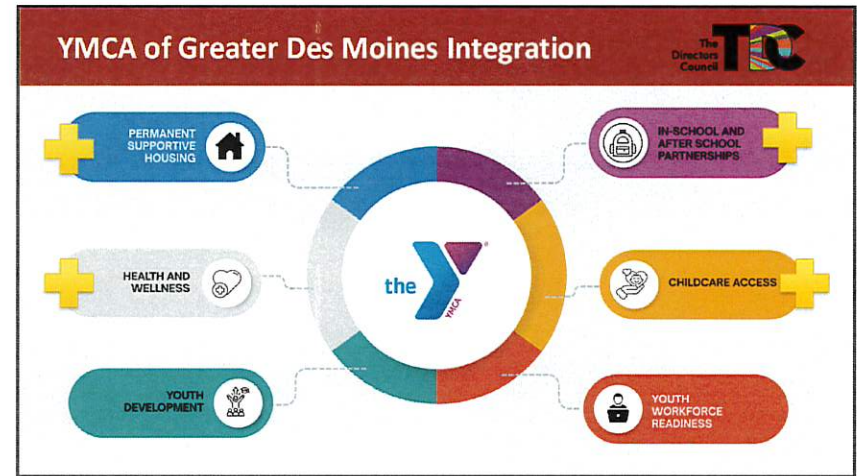
One Economy Collaborative Action Model



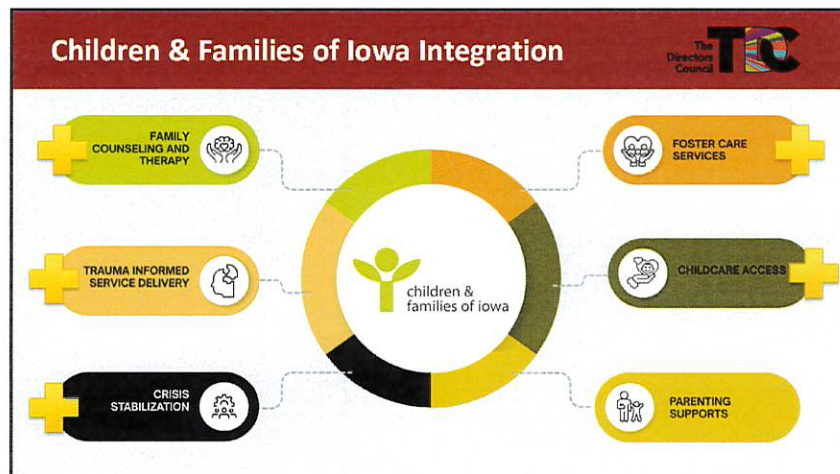
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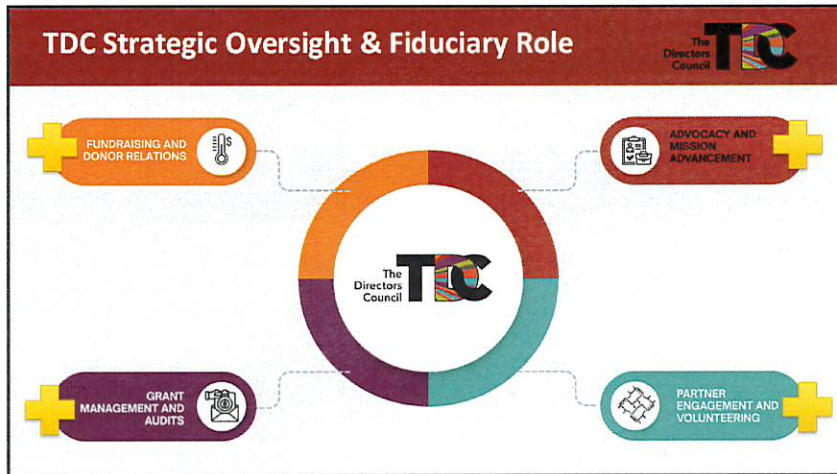
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23



24



25

Anticipated Outcomes for the Future

- **Year 1** - We will maintain the **16,000+** clients annually. Currently **4,042 unique individuals**, we plan to increase it by 5% in the first year.
Client retention at 70–80% across multi-service pathways.
Maintain current funders and have a smooth transition to TDC operating
- **Year 2** - Increase clientele to **17,000+** annually in 2027. Increase **unique individuals from 4,244 by 10%** for 2027.
– Launch Alternative Staffing Organization (ASA).
– Integrate One Economy Financial Development Corporation
- **Year 3** - Increase clientele to **18,000+** annually in 2028. Increase **unique individuals from 4,668 by 10%** for 2028.
– Launch Alternative Staffing Organization (ASA). 150–200 individuals placed in transitional or permanent employment through the ASA.
– Add **+8** community partners. Add **2–4** new major funding partners.

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Anticipated Outcomes for the Future

- **Year 4** - Increase clientele to **19,000+** annually in 2029. Increase unique individuals from **5,135 by 10%** for 2029. Add **20** new employer partners to the ASA. Add **+5** community partners.
- **Year 5** - Increase clientele to **20,000+** annually in 2030. **20+** active, aligned partners across workforce, housing, education, and health. Diversified revenue model with:
 - 25–35% earned revenue (ASA + OEFDC) Reduced dependency on single funding streams.
 - 500+ youth annually engaged in career exposure, internships, or workforce pathways.

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Uniting Our Community

Combined Impact

TDC | Oakridge Neighborhood | YMCA of Greater Des Moines | Children & Families of Iowa

- **75,000+** individuals annually across Central Iowa
- **Thousands** of children and youth served each year
- **Hundreds** of families supported through housing stability
- **Comprehensive services** spanning housing, childcare, behavioral health, and workforce development
- **More than 100** community partnerships across the state

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Outreach to Stakeholders

Student Engagement & Pathways

- Enhance student outcomes from early childhood through post-secondary completion
- Introduces early career exploration (elementary level)

Dual-Generation Family Engagement

- Implement evidence-based, dual-generation strategies
- Engages parents and children simultaneously

Neighborhood & Community Engagement

- Maintain EKDC's role as a trusted community hub
- Ensure services remain responsive to local needs

Partnership & Employer Engagement

- Builds on TDC's strong community, funder, and partner relationships

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Implementation Timeline

Phase I

- Transition Planning (Apr–May 2026)

Phase II

- Seamless Transition (June–July 2026)

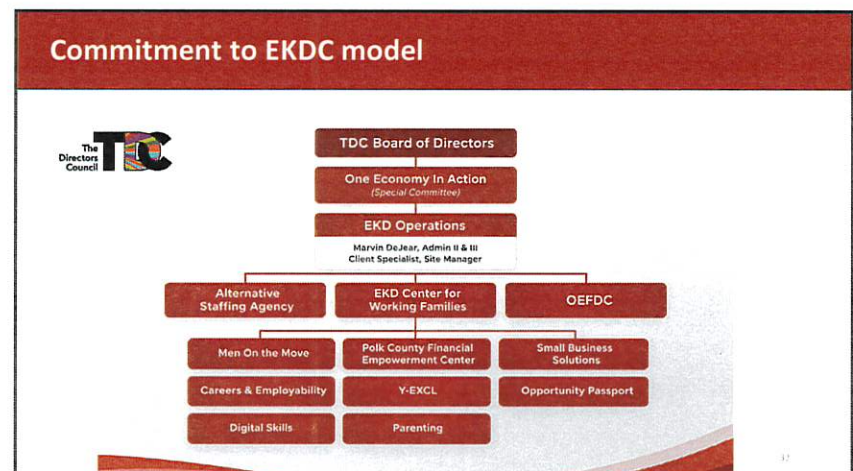
Phase III

- Stabilization & System Setup (Aug–Dec 2026)

Phase IV

- Growth & Activation (Year 2)

31



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Funding, Fundraising Strategy, & Sustainability

Funding

- Immediate Funding
- Proactive Request for Emergency Funding

Fundraising Strategy

- Diversified, Resilient Funding Strategy
- Strategic Growth Approach (Years 1–5)
- Philanthropy as a Growth Driver

Sustainability

- Built-In Sustainability Opportunities
- Development Plan



33

33

Accountability, Evaluation, & Continuous Improvement

Clear Accountability Structure

- Defined governance through TDC oversight and partner alignment
- Transparent reporting to **funders, partners, and stakeholders**
- Performance expectations aligned with CWF and One Economy framework

Data-Driven Evaluation

- Centralized Intake Model; Monitor key outcomes; Align metrics with **funder requirements and regional workforce goals**

Continuous Improvement Model

- Regular **performance reviews and program evaluations**
- Use data and community feedback to **refine services and close gaps**
- Pilot, test, and scale programs based on **what works**

Community & Participant Voice

- Incorporate **client feedback and lived experience** into program design
- Maintain strong **partner and neighborhood engagement loops**



34

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One Economy Vision for the Future of EKDC



Under the Direction of The Directors Council:

- Evelyn K. Davis Center will be a flagship of a regional economic mobility hub for Central Iowa
- **ALL** communities will be served using an inclusive approach
- We will support our staff with a competitive and comprehensive wage and benefits package
- We will invest in strengthening systems that support shared prosperity
- We are committed to long-term sustainability and dual-generational impact. ***Evelyn K. Davis is here to thrive!***

35

35

Thank You



The Evelyn K. Davis Center has always been about opportunity.

The Directors Council brings

- Community trust
- Proven partnerships
- A sustainable economic mobility model

Together we can ensure EKDC continues to expand opportunity for working families in Central Iowa.

36

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CONFIDENTIAL

GOAL

A welcoming urban neighborhood center featuring a mixed-use development with a wellness hub on first floor and 3-4 floors of multifamily workforce housing above, transforming former parking lot into affordable, stable and quality housing with an emphasis on 3-4 bedroom units.

HOUSING TENANTS

Prioritize Iowa's 1 in 3 cost-burdened renters composed of educators, healthcare professionals, and small business owners.



Oakridge Neighborhood Adjacent
1.109 acres

COMMERCIAL TENANTS

Integrate with trusted services to strengthen financial health, physical wellness, and career sustainability of tenants and others in the community.

Cafe, Juice Bar, and
Other Starter Jobs



Wellness Spa,
Braid Bar, Pipelines
to Apprenticeships



Co-Working,
Rotating Gallery Events,
Financial Institution,
Healthcare Institution

PLAN ALIGNMENT

- City of Des Moines 2025-2029 Consolidated Plan
- Des Moines Citywide Housing Strategy
- Downtown DSM Future Forward
- Capital Crossroads

LAND ACQUISITION

CURRENT
PHASE

\$966K

ESTIMATED COST

\$15M - \$16M

A WIN-WIN OPPORTUNITY

The lot Oakridge is seeking to acquire is currently owned by Mainframe Studios. For Mainframe, the sale would generate critical resources to invest in operations and capital projects, secure their financial future, and provide the stability needed to fully realize their mission of supporting artists and creative entrepreneurs. By facilitating this sale, Mainframe is helping ensure that the land is used in a way that aligns with both organizations' missions and contributes to the vitality of the region.

For Oakridge Neighborhood, acquisition of this property enables the organization to build much needed workforce housing and add additional social service programming and amenities without having to dramatically increase staffing or infrastructure, contributing to its rich, strong legacy of impacting lives by creating opportunities for our youth, adults, and their families.

This is a rare double-impact opportunity:

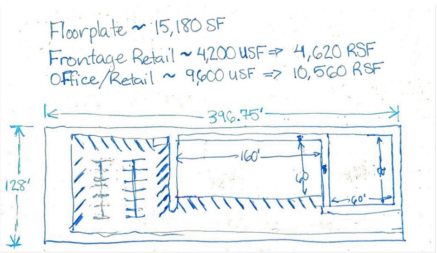
- Oakridge Neighborhood gains the space to expand its proven programs and services in the future.
- Mainframe Studios secures its financial future to fully advance its mission and vision.

60% of Units
Income Restricted

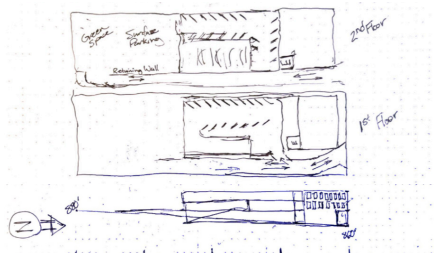
40% of Units
3-4 Bedroom



Multi-family floorplate inspiration with 39 units



Multi-family floorplate inspiration with 33 units



Factoring in the slope and site-prep

CONTACT

Deidre DeJear
President & CEO
Oakridge Neighborhood
DDeJear@OakridgeNeighborhood.org
515 | 244-7702

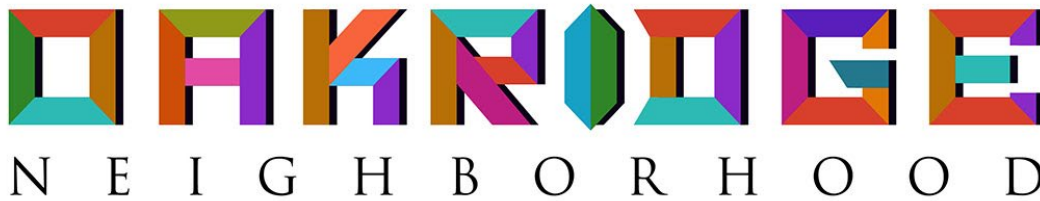
OAKRIDGE HUMAN RESOURCES COMMITTEE CHARTER

The Human Resources/Personnel Committee is established to provide guidance and recommendations to the Board of matters related to the personnel functions of the organization. It is the standing committee of the board as set out in Article III Sections F and G of the Oakridge Bylaws.

Bylaws State: There shall be a Human Resources Committee which shall be chaired by a Director of the Board as appointed by the President. The Human Resources Committee shall be composed of Directors and others (who need not be directors). The committee shall meet throughout the year as needed and advise on human resources issues included CEO Evaluation, succession and related staffing and personnel matters of the organization that require input from and the support of the Board.

In carrying out the duties and powers described in the Bylaws, the Board grants the committee authority and responsibility to:

1. Administer annual CEO Evaluation
2. Complete annual review of the organization's Succession Plan
3. Oversee CEO search and hiring process
4. Assist in annual review of job descriptions, salary range updates, performance management system and other related HR functions
5. Support the organization's HR needs and those of the CEO



Communications Update

2/10/26 – 4/2/26

Earned Media

- Pitched and facilitated deskside visit with Deidre DeJear and WE ARE IOWA 5 news director
- Submitted resident stories to Iowa Finance Authority per their request to highlight Section 8 resident successes

Paid Media

- Submitted Lenny Bell appointment to Des Moines Business Record “On the Move”
- Facilitated creative for March Business Record Daily ad
- Facilitated Giving Back ad in 2/22 Business Record

Shared Media

- Daily social media channel monitoring, response and engagement, plus invitations to potential new followers
- Organic and paid social media content development and post sharing on topics including: spring break camp, Community Difference Makers podcast, Oak Academy enrollment days, Black History Month, etc.
- Facebook, Instagram, Twitter (paused), LinkedIn, YouTube – Oakridge Neighborhood; Facebook, Instagram – Oak Academy; Facebook employee page

Owned Media

- Developed 2025 annual impact report content, facilitating creative
- Developed and distributed February and March external newsletters

- Developed and distributed March and April employee newsletters
- Developed and distributed February and March resident newsletters
- Developed Oak Academy brochure insert
- Facilitated content additions to website
- Updated Family & Workforce Programs computer lab slides
- Facilitating all details of Employee of Month program
- Facilitated apparel order for staff
- Revised comprehensive donor facing PowerPoint
- Developed misc. graphics and flyers for newsletters, social, and departmental use, including on upcoming pizza party with DMARC, Oak Futures, Oak Studio, Oak Studio events, Silver Oaks vacancies, Spring Giveaway, job openings, etc.
- Asset curation including youth programming, Oak Academy activities, hearing tests, success story subjects, etc.
- Revised volunteer opportunities listings, adding to website

Events/Presentations

- Developed Breakfast at Tiffany's communications; completing tactics, including news release; submission to community calendars; social media promotion; invitation; script, etc.
- Publicizing Enrollment Saturday event for Oak Academy
- Implemented all deliverables for Oakridge Neighborhood legislative day, including invitation, rentals, food, key messages, updated rack card, etc.
- Facilitated Deidre DeJear as guest speaker at Urbandale United Church of Christ

Additional

- Implementing 2026 Communications Plan
- Nominated Jamie Buelt for Live United award
- Wrote nomination letters for candidate for LGBTQ Legacy Leader Award
- Met with Drake University School of Journalism and Mass Communication to consider Oakridge Neighborhood as 2026-2027 PR and Strategic Political Communication senior capstone client
- Nominated Oak Academy as client for Lessing Flynn nonprofit project

- Facilitated Deidre DeJear and Oak Academy filming with Capital Crossroads
- Facilitated filming of family for United Way video
- Facilitated volunteer opportunities for several requesting
- Meeting with Urbandale United Church of Christ representatives regarding volunteer opportunities

Community Relations

- Al Éxito! – board of directors
- The Consortium professional business organization – president, executive committee
- Greater Des Moines Partnership – communications board

Results

Earned Media *(note: many news stories noted can additionally be found in media online and social channels, further maximizing exposure)*

- “Capital Crossroads annual report highlights progress on workforce housing, education,” Des Moines Business Record Daily, 2/17/26
- “Variety’s vans drive community impact in Des Moines,” KCCI-TV, 2/24/26
- “Breakfast at Tiffany’s,” Catch Des Moines calendar, March/April
- “Breakfast at Tiffany’s,” Business Record calendar, March/April
- “Breakfast at Tiffany’s,” WHO-TV calendar, March/April
- “Breakfast at Tiffany’s,” Des Moines Register calendar, March/April

Paid Media

- “Where children achieve. Families thrive. Prosperity is created.” businessrecord.com, 10/1/25 – 9/30/26
- “Where children achieve. Families thrive. Prosperity is created.” dsmmagazine.com, 10/1/25 – 9/30/26
- “Why Lil chose Oak Academy,” Business Record Daily, 3/4/26
- “Why Lil chose Oak Academy,” Business Record Daily, 3/11/26
- “Why Lil chose Oak Academy,” Business Record Daily, 3/18/26
- Breakfast at Tiffany’s, Google, 3/18 – 3/27, 4.18K impressions, 66 clicks, \$67.07

- “Why Lil chose Oak Academy,” Business Record Daily, 3/25/26
- “On the Move – Lenny Bell,” Des Moines Business Record, 4/3/26

Owned Media

- External Newsletter
 - Audience 1,379, **down 32** from 1,411 since 2/10/26

Shared Media

- Facebook
 - Followers 3,659, **up 96** from 3,563 since 2/10/26
- Instagram
 - Followers 1,299, **up 10** from 1,289 since 2/10/26
- LinkedIn
 - Connections 1,152, **up 6** from 1,146 since 2/10/26
- YouTube
 - Channel subscribers 233, **up 3** from 230 since 2/10/26
- Oak Academy Facebook
 - Followers 96
- Oak Academy Instagram
 - Followers 16

Anecdotal

- “Such a fun read!” – internal newsletter
- “Such a great newsletter with such interesting news! I especially enjoyed Nini’s story. Thanks for all you do to share these joys!” – internal newsletter



DEVELOPMENT REPORT - APRIL 2026

	2025 Target	2025 Actual	2026 Budget	2026 Actual	Percent
Corporate Giving	\$850,000.00	\$355,200.00	\$355,200.00	\$305,050	35.5%
Foundations	\$775,000.00	\$665,401.00	\$665,401.00	\$2,800	.3%
Special Events	\$300,000.00	\$154,486.17	\$188,000.00	\$32,325	3.8%
Individual Giving	\$125,000.00	\$224,735.58	\$224,000.00	\$46,748	5.4%
Year-End Giving	\$175,000.00	\$101,862.72	\$100,000.00	0	0%
Government Grants	\$1,225,000.00	\$698,096.61	\$1,115,899.00	\$471,923	54.9%
Total	\$3,500,000.00	\$2,199,782.08	\$2,688,500.00	\$858,846	100%

Trendlines: FY25 Q1 total: \$240,148; FY26 Q1 total: \$858,846 - a 258% increase. This trend has met expectations. Outlook for the remainder of FY26 looks steady with the addition of Principal, Delta Dental, Telligen, as well as stronger individual investments.

Q1 Highlights

- Shared Visions is BACK! Oakridge was awarded a new Shared Visions grant for \$263K annually, renewable for five years.
- Randy McNeal officially retired on March 31, ending nearly 20 years of service at Oakridge. HUGE thank you to Randy for raising millions of dollars for the organization. Randy will continue to serve on the Development Committee.
- Delta Dental of Iowa selected Oakridge for its next One Sight Vision Clinic on July 9-10 on the Oakridge campus. Grant funding for operations to follow.
- Raisers Edge NXT is now fully integrated with Financial Edge NXT, our accounting system. Zami Dainkeh, accounting associate will receive training to process donations.

Special Events

- **Breakfast at Tiffany's – Sunday, April 26, 2026, at Willow on Grand**
Corporate sponsors: Sammons Financial Group, Unity Point, Tom's Auto Group, and Bob Brown Chevrolet/Premier Chevy Dealers.
Individual sponsors: Carol Bodensteiner, Jamie Buelt, Jillian Eddy, Tim Haight, Annette Wallace, Kim Willis, Marcia Wanamaker, Maria Volante.
Popup Vendors: Leona Ruby (East Village accessories retailer), 28 Mina (gifts), Lady Lex (candles), Oak Studio (various teen makers), Naomi Mendez (children's author).
- **Oak Society Reception 2026: Wednesday, December 9.** Joint celebration with the Board meeting/social and our annual awards.
Golden Oak honoree: Loretta Siemann.
Oak Society honoree: Vernon Johnson, and posthumously, Teree Caldwell-Johnson.



Grant Landscape

- **Best Buy Foundation – Awarded \$232,000**
- **Nationwide – Awarded \$30,000** for workforce operations.
- **Polk County Development Grant – Pending.** Decision expected for shade structures.
- **KKR – Pending – Pending;** funding for Oak Studio is confirmed, yet amount is TBD.
- **Athene – Awarded \$10K** for Oak Studio.
- **ITA Group – Pending;** awaiting decision.(Est. \$1K)
- **Principal – Pending;** Est. \$100K for workforce.
- **Bankers Trust – Awarded \$30K** for Oak Futures Youth Employment Program.
- **Iowa Early Childhood Continuum of Care – Pending;** awaiting decision. (Est. \$100K/annually for three years).
- **IWD Future Ready Iowa – Awarded \$30K** for summer youth internship program.
- **Prairie Meadows – Pending** – decisions in June (2 applications).
- **Delta Dental of Iowa** – Vision Clinic application due 5/1.
- **United Way of Central Iowa – Pending (7);** program presentations in April & May.
- **Bank of America – Pending;** decision in May for youth employment program.
- **AARP – Pending;** est \$5K for silver oaks.
- **Shared Visions Parental Support – Pending;** est. \$65K.
- **Polk County Housing Trust Fund** – application due May 1.
- **EMC Foundation** – application due May 1.
- **Variety Club of Iowa** – Oak Studio application due May 22.
- **Storey Kenworthy** – sponsorship application; monthly revolving window.
- **Merchants Bonding Company** – application due by July.
- **Green State Credit Union Foundation** – application due July 1.
- **Wells Fargo – LOI submitted;** awaiting invitation to make a full application in May.
- **Community Foundation of Greater DM: LOI submitted** for an integrated health pilot.

Capital Projects

- **Mainframe Parking Lot** – final deadline for purchase April 30. Status TBD.
- **Urban Community Center** – Second installment of appreciated DOW stock from Toni & Tim Urban is expected this summer. Est. value - **\$135,000**. Construction timeline TBD.
- **Shade Structures / Swing Set Pocket Park** – Installation TBD.

Oak Studio Teen Tech Center

- Rebranding is nearing completion for the Oak Studio Teen Tech Center, removing references to Best Buy in the studio, as well as online.
- Oak Studio's current contract with Best Buy expires in April 2026.
- Career Pathways cohort is making the final adjustments to their water-quality capstone project for Project Invent's Demo Days in San Francisco in May.
- Oak Studio will have a booth at the upcoming Federal Home Loan Bank "Connecting Communities" Volunteer Fair on May 6, from 11 am to 1 pm.
- Four Oak Studio teens submitted scholarship applications for the highly competitive Best Buy/United Negro College Fund worth \$40K over four years. Decision in May.





Oakridge Neighborhood Governance Committee Meeting Minutes April 10, 2026

Attendance: Emily Lemay, Sharon Gaddy-Hanna, Diana Dubuisson, Kent Kramer, Jamie Buelt, Marcy Baker, Deidre DeJear, Sheri Fitzpatrick

Not in Attendance: Matthea Smith

Meeting called to order at 11:09 a.m.

Board Member Recruitment

The committee reviewed board recruitment strategy to fill gaps in corporate representation and expertise. Potential company's/ candidates listed below.

Principal: Armel R Traore dit Nignan

Invest DSM: Theresa Greenfield, Chris Civitate

Unity : Erica Axiotis, Courtney Green

John Deere: Dawn Sileski

Wellmark Blue Cross Blue Shield:

Current Board Composition is 23 members with a cap at 25. Ten board member terms expire in 2024 (3 first terms, 5 second terms, 2 third terms); Deidre will contact all terming-out members to confirm their intentions before next meeting

Recruitment Strategy

- Targeting corporations currently giving modest amounts (\$3,500-\$5,000) with capacity for larger contributions
- Priority on capital fundraising connections and corporate communication lines for funding presentations
- Next quarter: outreach to prospective members with committee support

Upcoming Events

- Oakridge Neighborhood Board Meeting- April 15th at 7:30 am at Oakridge
- Breakfast at Tiffany's April 26th at 11 am at Willow on Grand

Meeting Adjourned at 11:35 a.m.



April 1, 2026
8:00 am Zoom Meeting Minutes
Organizational Strategy

Attendance: Albert Farr, Erin Kuhl, Tim Haight, Nalo Johnson, Alex Marckmann, Deidre DeJear, Sheri Fitzpatrick

Absent: Deidre Williams, Jessica Feeney, Skylar Mayberry-Mayes, Sherri Hart

Albert Farr called the meeting to order at 8:05 a.m.

The Committee reviewed strategic planning needs, technology and staff development updates, the Evelyn K. Davis Center application status, and fundraising activities.

Key Decisions & Updates

- Meeting Time: Confirmed regular start time at 8:00 AM.
- Request: Notify meeting lead when unable to attend.
- Baton Global: Agreed to reconvene with Baton Global to review strategic plan updates and KPIs. Deidre will set up a meeting for this committee to review KPI's
 - Special Meeting scheduled: May 6, 2026, at 8:00 AM.
- Technology: CRM unification remains a priority. Zirous transition progressing well; server transition deferred pending review of lower-cost cloud options.
 - a. Alex & Deidre: Review Xerus cloud server alternatives.
- Staff Development: Leadership development programs underway; DMACC student placements continue with one potential hire identified.
- Training: Mandatory and optional trainings active across departments with strong participation.
- Evelyn K. Davis Center: Final presentation completed; decision expected April 13, 2026. Proposal aligns with Oakridge's Oak Solutions initiative.
- Fundraising: "Breakfast at Tiffany's" fundraiser scheduled for April 26, 2026, supporting Oak Academy scholarships and Youth Employment expansion.

Next Meetings

- Special Meeting: May 6, 2026 | 8:00 AM – Baton Global strategic/KPI review
- June Meeting: Set for June 3, 2026 covering KPI implementation and ongoing initiatives



N E I G H B O R H O O D

OAKRIDGE NEIGHBORHOOD AND NEIGHBORHOOD SERVICES

Human Resources Committee Meeting Minutes

March 27, 2026 - 10 a.m.

Present: Joyce McDanel, Deidre Williams, Mary Johnson, Tim Haight, Deidre DeJear, Sheri Fitzpatrick

Absent: Sharon Gaddy-Hanna, Sherri Hart

Joyce called the HR Committee meeting to order at 10:01 am

Timeline:

The committee reviewed the timeline for the committee and agreement was made on dates and times. Committee addressed the potential need for change in the charter that discussed – committee to:

- Assist in annual review of job descriptions, salary range updates, performance management system, and other related HR functions

Committee discussion:

- 2026 wage and pay increases for Oakridge employees
- Succession planning for senior staff members
 - Currently underway – teaching skills and growing the staff
 - Discussion of positions that might have retirees in the next 3-5 years
 - Succession Document for Key roles
- CEO evaluation- reaching out to Mollie Frideres to use her in the process
 - Joyce will reach out to Mollie to confirm agreement for 2026

Additional information:

- Final presentation of operating proposal for Evelyn K Davis
 - Decision to be driven by data
 - DMACC Voting on April 13th
 - Deidre to send PowerPoint
- Reminder of Breakfast at Tiffany's April 26 at Willow on Grand

Meeting Adjourned at 10:30 am

Next Meeting – May 22, 2026, at 10 am

FAMILY & WORKFORCE PROGRAMS

FIRST QUATER ACTIVITY REPORT 2026

Total Served

1,285

Unique Individuals Served

573

Job Placements

25

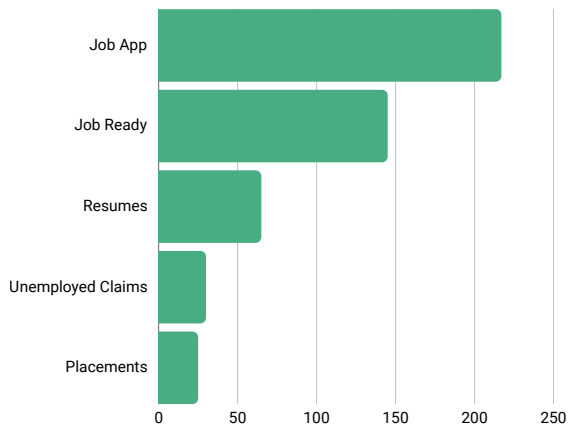
Average Salary

\$18.00 hr

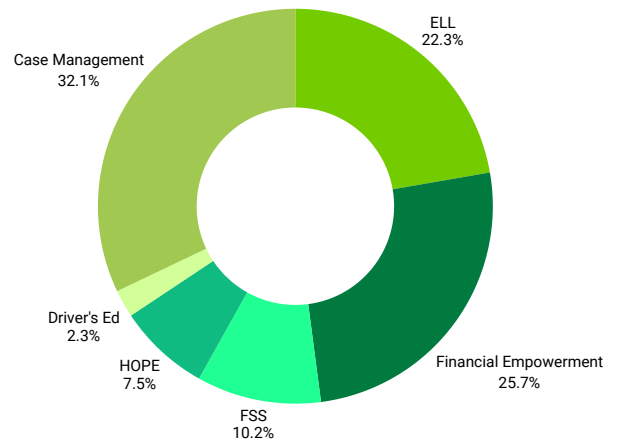
Zip Codes

26

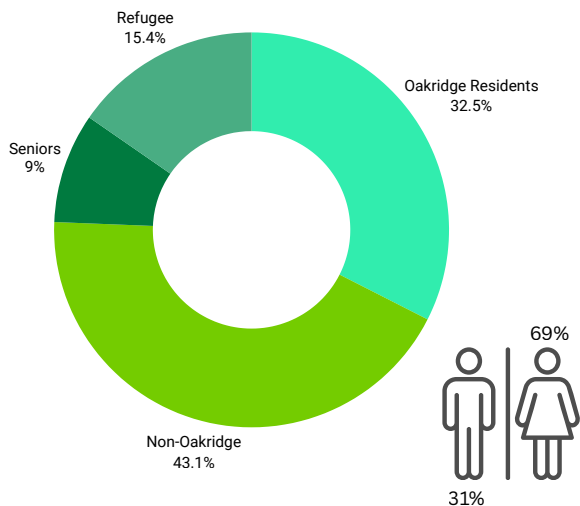
Workforce Readiness



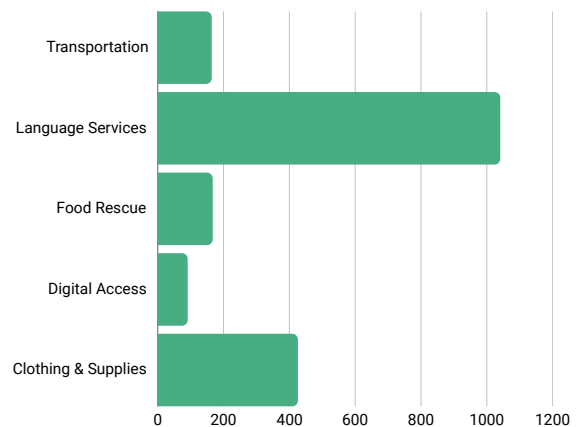
Engagement



Clients' Profiles



Service Points



Emerging Trends

- Tightening job market
- Rising demand for essential services
- Affordable housing shortage
- High demand for ELL classes
- Rising demand for transportation

Efforts & Initiatives

- 25 individuals secured employment
- 167 Accessed food pantry and essential household items
- 59 enrolled in ELL classes
- 13 participated in financial coaching
- 17 utilized our laptop lending library
- 19 Prepared to Care

Upcoming Events

- Summer Giveaway
- Family Stability Workshops 4/21, 4/23
- Summer Digital & Workforce Readiness classes 5/7-5/14
- Eye Clinic 7/9-7/10
- Senior Employment Initiative

OAK ACADEMY ENROLLMENT REPORT

Column1	1.31.26	2.28.26	3.31.26
Month Start Enrollment (84)	74	78	77
Month End Enrollment (84)	78	77	79
Program Exits	0	5	3
New Enrollment	4	4	5
Pipeline Enrollments	4	3	3
Headstart Enrollment (8)	8	8	8
Shared Visions Enrollment (32)	17	16	18
Enrollment Event Signups	7		



OAK FUTURES

2026 SUMMER EMPLOYMENT

READY TO WORK?

Are you 14-24? Do you live in Polk County?
Are you a student ready to do more than just
another internship? Do you want to learn,
grow, and make a real impact? Oak Futures
is your opportunity to do just that.

APPLICATION DEADLINE

MAY 11, 2026

SCHEDULE AT-A-GLANCE

June 15, 2026

Employee Pre-Training Begins

June 22, 2026

Employment Start Date

August 11, 2026

Oak Futures Graduation

August 14, 2026

Employment End Date



SCAN TO APPLY
(OakDSM.link/OakFutures26App)

POTENTIAL EMPLOYERS INCLUDE...

Ladie Lex Candles • Unity Point • Des Moines Art Center
Lifestyle Juices • Willkie House • Financial Plus Credit Union
Harkin Institute • Living History Farms • Drake University
The Science Center of Iowa • Designed By the Streets
Blank Park Zoo • Good Vibes Movement

OAK NEIGHBORHOOD

1401 Center St, Des Moines, IA 50314



YOUTH PROGRAMMING

2026-27 Program Calendar

Jun 2026						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Jul 2026						
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12	13	14	15	16	17	18
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26	27	28	29	30	31	

Aug 2026						
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30	31					

Sept 2026						
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27	28	29	30			

Oct 2026						
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Nov 2026						
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29	30					

Dec 2026						
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Jan 2027						
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31						

Feb 2027						
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Mar 2027						
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Apr 2027						
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May 2027						
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9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

June 3-4	Closed Staff PD
June 15	Open Full Day (Summer Blast Camp Begins)
June 19	Closed Holiday
—	—
July 3	Closed Holiday
July 31	Steam on the Ridge
—	—
Aug. 4	National Night Out
Aug. 14	Last Day - Summer Blast Camp
—	—
Sept. 7	Closed Holiday
Sept. 18	Open Full Day
Sept. 21	Closed Staff PD
—	—
Oct. 22-23	Open Full Day
Oct. 27	Fall Festival
—	—
Nov. 2-3	Open Full Day
Nov. 25	Closed Staff PD
Nov. 26-27	Closed Holiday
—	—
Dec. 21-23	Open Full Day (Winter Break Camp)
Dec. 24-25	Closed Holiday
Dec. 28-30	Open Full Day (Winter Break Camp)
Dec. 31	Closed Holiday
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Jan. 1	Closed Holiday
Jan. 14-15	Open Full Day
Jan. 18	Closed Holiday
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Feb. 15	Closed Staff PD
—	—
Mar. 10	Closed Staff PD
Mar. 11-12	Closed
Mar. 15-19	Open Full Day (Spring Break Camp)
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Apr. 23	Closed
Apr. 26	Closed Staff PD
—	—
May 31	Closed Holiday

■ Regular Programming
■ Open Full Day

■ Closed
★ Special Event