



# Child Start Inc., Head Start

Serving the families of  
Missoula, Mineral, Granite, Powell, and Sanders Counties  
2625 Briggs St., Missoula, MT 59803  
Phone (406) 728-5460 / Fax (406) 493-0499



## **Lifestyle Spending Account Benefit Policy**

### **Rationale:**

The Lifestyle Spending Account (LSA) Benefit Plan is instituted as a comprehensive approach to enhance the overall well-being, work-life balance, and professional development of our employees, aligning with our commitment to their diverse needs. This policy adheres to the guidelines of 45 CFR 75.437, which allow for costs incurred for the improvement of working conditions, employer-employee relations, and employee health and performance, based on documented policy. By offering a flexible, customizable range of benefits that cover physical, mental, and financial wellness, as well as personal growth and caregiving, the LSA aims to foster a more engaged and productive workforce. This approach not only strengthens employer-employee relationships but also bolsters employee morale, loyalty, and job satisfaction.

### **Policy:**

The Lifestyle Spending Account (LSA) is allocated a budget of \$1,200 per employee for each fiscal year, spanning January to December. Eligibility for this program is extended to all employees. The distribution of the allocated funds is completed monthly at \$100. The LSA funds are designated to expire at the conclusion of each program fiscal year.

The process for claiming these benefits is delineated as an electronic submission through the designated servicer, Elevate/Apprize, a protocol that ensures both efficiency and compliance in the management of the LSA. This framework of the LSA is meticulously designed to align with organizational objectives, providing a structured and accessible benefit to our employees in a manner that adheres to both legal and organizational standards.

The following constitute allowable LSA expense categories:

#### *Expense Categories*

##### **Financial wellness**

- Financial advisor and planning service
- Personal finance and budgeting seminars, classes, or counseling
- Estate planning costs
- Tax-preparation services
- Student loan consulting services

##### **Fitness and physical wellbeing**

- Fitness classes and gym, health club and spa memberships
- Healthy eating apps
- Athletic equipment and accessories
- Exercise equipment



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- Sports lessons or associated fees
- Personal trainers
- Fitness trackers
- Nutritional supplements
- Race entry fees
- Sports league costs
- Passes for things like skiing and snowboarding, and national parks
- Massage therapy and equipment

## **Mental health**

- Wellness coaching
- Meditation classes and apps
- Non-medical counseling services like couples therapy, life coaching and parenting skills workshops

## **Skills development**

- Personal development classes like art or cooking
- Class materials and supplies