**Newcap, Inc. Action Plan 2019**

**Asset Development**

|  |
| --- |
|  |

|  |  |  |  |
| --- | --- | --- | --- |
| Actions/Tactics (including Metrics): (Twelve Months) | Who will see the Action is completed? | Measure | End Date |
| FINANCIAL CAPABILITIES Objective 1: Education – 1. Budget Counseling provided to internal Newcap clients by referral from peer program staff. External referrals from partnering community agencies. Fee schedule included in Asset Development Strategic Plan.
2. Events/Seminars/Programs including Money Smart for Older Adults, The Spirit of Giving, Money Smart for Small Business, Money As You Grow Book Club, Understanding Credit, and Money Smart for College Students.

  | Lisa C | A minimum of 15 new enrollees in Newcap’s Budget Counseling Program monthly.At minimum; 5 scheduled presentations per quarter.Education:Integration of CAPTAIN’s referral recognition functionality. Roll out of Asset Development Program Requirements. (All Asset Development program participants will be required to attend one complimentary budget analysis). This will be strongly encouraged as a requirement for all Newcap program participants.Weekly outreach activities to engage local businesses, financial institutions, libraries, municipal entities, and peer community groups to host presentations. | 12/19 |
| STEPS TO SUCCESS – Objective1: Participant Diversificationa: Strategic Approach to recruit enrollees in Certificate Programs focused on skilled-trades. Program participation will be limited to 30% or 3 of the program’s new enrollees in the medical support field of study. The remaining 7 qualified participants would be currently enrolled or beginning their course of study in skilled trades such as welding, auto mechanics, CNC, construction, fabrication, etc.Objective 2: Continued Participation in POINT’s Employee/Employer Development Initiative.  | Lisa C., Lynn R. and Tanja S. | Minimum of 2 new STS participants enrolled in skilled-trade certificate course study.Minimum of 1 new STS participants enrolled in skilled-trade certificate course study.Minimum of 2 new STS participants enrolled in skilled-trade certificate course study.Maintain a pipeline of 10 total program participants with a 90% successful exit rate.Outreach includes a minimum of 2 arranged meetings monthly with area manufacturing companies and their HR/Training Staff and 1 meeting per month with NWTC, Nicolet College, UW Extension, and area HS trade related faculty to expand & tailor our skills & training programs to meet their needs and support students wishing to pursue careers in these target fields.  | 1st QTR 20192nd QTR3rd QTR4th QTR |
| CREATE YOUR OWN OPPORTUNITIES – Goal 1: Expand educational class offerings to include online and face to face programming to engage 30 new or cross program clients focusing on (but not limiting to) Brown county, Oconto county, Shawano county, & Langlade county.Goal 2: Onboard 10 new clients into V2C coaching program. Goal 3: Secure financing to expand CYOO program to 1 full time and 1 part time team member by EOY 2019  | Tanja SchneiderTanja SchneiderTanja Schneider | Launching new class programming every 2 months with average attendance of 10 per classMonthly planned meetings with area Economic Development Boards and County Human Services Directors to develop needs-based entrepreneurship opportunities. More robust participation in GB Chamber, Oconto Chamber, Definitely DePere, Management Women, M&M Chamber, and Grow North.10 new clients into V2CTwo income eligible entrepreneurs enrolled in CYOO program.1 additional eligible program enrollee and 1 newly establish business.2 additional program enrollees and 1 established business.2 additional program enrollees, 2 established businesses and 1 additional job created |  |
| HOME –Objective 1: Down Payment Assistancea: Offering down payment assistance provided to income eligible low-to-moderate income homebuyers. Clients must meet eligibility requirements including household income at or below 180% of county median; their mortgage payment cannot exceed 35% of their gross monthly income, the home must pass an HQS Inspection performed by a Newcap employee. The applicant must also complete Homebuyer Counseling and Budgeting with Lisa ChristensenObjective 2: Rehab Program Using HOME contract funds and/or program income to make the necessary repairs to owner occupied properties; preserving their ability to live in a safe and sound environment. Rehab funds are offered based on the same eligibility requirements as other HOME funds. Only safety and soundness repairs are allowed. The program is offered to present Newcap clients and by referral from other community programs. Many rehab projects are a collaboration of several entities such as USDA, Options for Independent Living, and Habitat for Humanity. Funds are subject to availability.  | Cynthia Patterson Lisa C | 4 transactions 1st Qtr8 transactions 2nd Qtr15 transactions 3rd Qtr5 transactions 4th Qtr10 Rehab Projects in conjunction with Homebuyer Purchase |
| HCRI/HOMEOWNER ASSISTANCE – Objective 1: Foreclosure InterventionFunds can be used to prevent a foreclosure action resulting from a temporary financial setback. The participant must show the ability to resume making monthly payments. Newcap acts as a liaison/mediator to facilitate a modification of mortgage when in the best interest of the client. Program eligibility is based on the same household income parameters and the property must be have an HQS Inspection performed and all necessary repairs must be completed during the loan modification/default cure process. Rehab funds from the HOME contract can be used if needed . The client must be current on property taxes and have Homeowner’s Insurance in place. Assistance is maxed at $3500 and can only be used once. Clients are required to participate in foreclosure and budget counseling facilitated by Eileen Gossen. Funds can be used to pay back property taxes using the same eligibility criteria. Objective 2: Homebuyer Down Payment AssistanceFunds can be utilized in the same manner as HOME funds. | Lisa C | 2 applications received per month and 1 client assisted with mortgage foreclosure intervention.1 application received per month. 7 applications received in the quarter and 1 client assisted avoiding tax sale.7 applications and 2 clients assisted avoiding tax sale.1. applications and 1 client assisted avoiding tax sale.

Based on funds availability at end of contract. |
| Outreach and recruit customers for enrollment into services | Lynn | 160 customers enrolled | 12/19 |
| Achieve a 90 % credit attainment rate of those customers who exit the program  | Lynn | Monitor Exits | 12/19 |
| Achieve a 85% entered employment rate for those Adults who exit program and 92% rate for those Dislocated Workers who exit the program | Lynn | Monitor Exits | 12/19 |
| Achieve Median Earnings increase after entry into employment of $12400 for Adults and $18500 for Dislocated Workers | Lynn | Follow up surveys | 12/19 |
| Achieve a 90% Retention Rate for Adults and 95% rate for Dislocated Workers who have entered employment | Lynn | Follow up surveys | 12/19 |
| Coordinate with other agency programs for referrals as well as any future agency programs for persons to update employment skills or obtain additional education  | Lynn | Out reach and receive referrals | ongoing |

**Community Health Services**

|  |  |  |  |
| --- | --- | --- | --- |
| Maintain and expand the number of clients served needing the Family Planning Only Services (FPOS) | Director/All CHS staff | Monthly/yearly comparisons | Ongoing |
| Maintain and expand the number of clients served needing the Sexually Transmitted Disease (STD) services. | Director | Monthly/yearly comparisons | Ongoing |
| Maintain the Brown County Grant for the provision of STD services. Anticipated renewal 12/2019. | Director | Monthly report completion and continued funding support | Ongoing |
| Expand the provision of services to provide health care to the homeless. | Director | Decision to develop specific program for this population | Ongoing |
| Expand the provision of services to residents of public housing. | Director | Decision to develop specific program for this population | Ongoing |
| Continued addition of general wellness/”sick care” services by our nurse practitioners in all locations. | Director | NP Staff certified for this care | April/ongoing |
| Seek out and apply for at least three grants to supplement current programs or for the expansion of services to include funding for healthcare for the homeless and public housing. | Director/Grant Writer | Obtain additional funding through grants. | Ongoing |
| Incorporate TTS in practice and overall agency operations to include thorough understanding of billing and staffing needs.  | Newcap spearheaded by director, CEO, and VP  | 2 scheduled programs per clinic | December |
| Collaborate with community Psychiatrists and Paraprofessionals to fulfill TTS goals and obligations | Director/ VP | Having fully staffed and organized plan of approach for TTS | June |
| Collaborate with community entities and partners for continuity/exchange of services for our clients. | Director/Clinic Staff | Ongoing communications with community healthcare provider | ongoing |
| Collaborate with the DHS/State of Wisconsin to initiate a clear and concise sliding fee scale to be used in conjunction with Title X funding.  | Director | Clear policy in place for sliding fee scale | March |
| Collaborate with UWGB to again provide services and in return increase clinic revenue. | Director/ Experienced Clinic Staff | Staff feedback and performance reviews | Ongoing |
| Work with community partners and learning from established programs, we will explore adding dental care to our health services division. | Director & CEO |  | 2019 Plan |
| Initiate a successful “employee-friendly” clinic to use and maximize our current medical insurance expense. | Director/Clinic Staff |  | Ongoing |
| Ongoing budget analysis to see where clinic stands financially and add/remove expenses as needed while moving towards and maintaining positive accounts. | Director |  | Ongoing |
| Increase the number of accepted insurances to increase patient volume. | Director/Medical Billing Specialist |  | Ongoing |

**Energy Services**

|  |  |  |  |
| --- | --- | --- | --- |
| Actions/Tactics (including Metrics): (Twelve Months) | Who will see the Action is completed? | Measure | End Date |
| Provide Full Weatherization Services to households meeting program eligibility criteria in 7 county service area of Brown, Marinette, Menominee, Florence, Forest, Oconto, Shawano as well as Oneida, Stockbridge-Munsee and Mole Lake/Sokaogon/Chippewa Tribes. Full Weatherization Services consist of an Energy Audit of the home, and performing energy conservation measures such as air sealing, insulation of the attic and/or sidewalls, installing LED bulbs and fixtures, replacing appliances such as refrigerators, freezers, furnaces and water heaters with Energy Star rated and high efficiency units. A Final inspection of all work completed will be performed on all homes. | Weatherization Program Director, Assistant Program Director, Administrative Staff, HVAC Superintendent, Field Coordinator, Energy Auditors, Weatherization crews, HVAC, Plumbing and Electrical Technicians, Final Inspectors. | 421 Units/968 Individuals |  |
| Provide Limited Weatherization Services to households meeting program eligibility criteria in 7 county service area of Brown, Marinette, Menominee, Florence, Forest, Oconto, Shawano as well as Oneida, Stockbridge-Munsee and Mole Lake/Sokaogon/Chippewa Tribes. Limited Weatherization Services consist of an Energy Audit, LED bulb replacement, replacing refrigerators and/or freezers with Energy Star rated appliances and electric to gas water heater conversions. | Energy Services Program Director, Assistant Program Director, Administrative Staff, HVAC Superintendent, Energy Auditors, Plumbing and Electrical Technicians, Final Inspectors. | 60 Units/138Individuals |  |
| Furnace Program in 7 County Service Area of Brown, Marinette, Menominee, Florence, Forest, Oconto, Shawano as well as Oneida, Stockbridge-Munsee and Mole Lake/Sokaogon/Chippewa Tribes. Work collaboratively with WHEAP Agencies within our service area to process furnace referrals and provide service to households in need of furnace repair or replacement. The furnace program is a year round program consisting of three type of referrals; Emergency Furnace – October 1 – May 15, Non-Emergency – May16 –September 30 and Weatherization Referral – Year Round.   | Energy Services Program Director, Administrative Staff, HVAC Technicians, HVAC Sub-Contractors, Final Inspector  | 140 Replacements/322 Individuals230 Repairs/529 Individuals |  |

**Food Programs**

|  |  |
| --- | --- |
|  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Actions/Tactics (including Metrics): (Twelve Months) | Who will see the Action is completed? | Measure | End date |
| Now that the goal for a total direct delivery model in all eleven counties has been reached, the new goal will be to allocate and help pantries move the huge influx of food that will be coming within the 2019 year. | Scott/Deb | We have just learned that there will be an enormous amount of bonus food items coming to TEFAP and will be partnering with non-TEFAP pantries to move this great amount of food. The non-TEFAP pantries will be offered a 1 year contract and will only receive bonus food items. All new pantries will need to be TEFAP trained and inspected. | Ongoing |
| Continue to assist all outlet pantries with the transition of direct delivery and meet with each pantry on a regular basis.  | Scott | Develop a better working relationship with each outlet pantry and promote Newcap Inc. within each one. | Ongoing |
| Work on food and monetary donations, especially in the Marinette area. | Scott/Shawn/Deb | With the Marinette pantry now over 600 households/ month, much more food is needed to sustain the pantry. Shawn has been trying to add more stores and has reached out to several in the area. |  Ongoing |
| Build a volunteer network for all Newcap pantries. | Scott | Find more volunteer staff for support in all our pantries | Ongoing.  |
| Work this year with farmer’s markets for fresh food donations. | Scott/Deb | Develop a partnership with area local farmer’s markets and roadside stands for donations of fresh fruits and vegetables. TEFAP is moving more and more towards a “fresh plate” model and need to be proactive on getting fresh produce. | Spring & Summer Months |
| Continue to look for grants to enhance the program. | Scott/Deb | Money will be needed to improve dated equipment. Get more involved with community organizations | Ongoing |

**Housing**

|  |  |  |  |
| --- | --- | --- | --- |
| Actions/Tactics:  | Who will see the Action is completed? | Measure | End Date |
| Working with the state Balance of State, we will create a program focusing on the needs of homeless, unaccompanied youth to give them the structure and support they need to ensure they graduate from high school and get started successfully into the future. | DEBBIE | Program created | still looking for funding for this project |
| WHEDA Housing Choice Voucher | DEBBIE & ERIN | 242 vouchers distributed & managed  | ongoing |
| Emergency Solutions Grant/Housing Program/Homelessness Prevention Program This funding includes Rapid Re-Housing, Homelessness Prevention and Diversion | ERIN | 20 households in RRH12 households in HP20 households in Diversion | 6/30/2019 is the end date and renewal funding 7/1/2019 |
| Permanent Supportive Housing “HOUSING FIRST”Permanent Supportive Housing BROWN COUNTY FAMILIES | BethDEBBIE | 18 individuals housed & assistedComplete rehabHouse 2 Chronically Homeless Families | ongoingongoing |
| Permanent Supportive Housing BROWN COUNTY INDIVIDUALS | DEBBIE | 45 individuals housed & assisted | ongoing |
| Expand Permanent Supportive Housing Program Brown County Individuals | Debbie | Increase capacity by 2 staff and 20 additional slots | There is no exact start date for this project 12/31/2019 |
| Develop and administer a rapid re-housing program for survivors of domestic violence using a DV housing first approach | Debbie | Hire 1 additional staff person11 available housing slots | 7/1/201910/31/2019 anticipated  |
| Develop and administer a rapid re-housing program for youth (18-24) in Brown County, partnering with Family Services | Debbie | House & assist 20 youth | ongoing |

**Human Resources**

|  |  |  |  |
| --- | --- | --- | --- |
| Actions/Tactics:  | Who will see the Action is completed? | Measure | End Date |
| We will focus on securing good staff involvement by hosting listening sessions with staff across the Agency and exploring ways in which we can mutually improve the Agency.  | Human ResourcesDirector | Currently All Staff meetings are held and Department meetings encouraging questions;Encouragement given during Onboarding Exit interviews are utilized.. | ongoing  |
| We will form a staff committee (one person from each department or program) to share perspectives from the point of view of staff. This Committee could focus on recommending updates to the Employee Handbook and the clarification and posting of all policies that serve staff and the Agency. | Human ResourcesDirector | H.R. will develop the framework for this in conjunction with management.One on one conversations have been taking place | ongoing |
| We will establish a pay schedule that reflects education, skills, performance and the availability of funds to support it. We will tie the pay schedule to a career progression plan, with a specification of the education, skills and performance necessary to progress up through the career steps established in the plan (accounting for availability of position openings as well). | Human ResourcesDirectorProgram Directors | All turnover and new positions have taken this into account for 2018.In the implementation phase for other positions. | ongoing |
| We will establish a system of annual performance reviews, using a consistent review process for all staff that focuses on performance improvement within their area of responsibility. | Human ResourcesDirector | Completed… Saba-Halogen Talent Management System was implemented and is being utilized for this purpose through the 360 reviews and evaluations 90 day and annual reviews /evaluations. | ongoing |
| We will provide training for Staff in support of their career progression and professional growth and as a means to bring departments together through a shared learning process and the development of best practices.  | Human ResourcesDirectorProgram Directors | Leadership training, Strengths Based Leadership training Favorable training evaluations (through comments) and put into practice by supervisors/management.Improved communications.Software training and process for desired employee training needs.Staff are assigned online eLearning, Department training sessions, and Staff Meeting presentations. | ongoing |
| Staff will be encouraged to volunteer in their communities, getting involved in community events, and helping to support their community. We will evaluate the design of an agency volunteer program/policy. | Human ResourcesDirectorDevelopment DirectorDeputy CEO | Employees are volunteering more.New volunteer opportunities are made available through the program Directors, Development Director, and Deputy CEO. | ongoing |
| We will ensure that all staff and Board Members are more aware of the Agency/program budgets, to provide insight and understanding on the part of all staff, agency-wide | Finance Department, CEO, Human Resources | CEO is in the process of continued training on all aspects of Budgets & Budgeting with Directors/Board Members.Excel/Advanced Excel training is available & utilized.H.R. coordinates efforts with CEO in accomplishing this objective as directed.A new software program was implemented now in needs additional practice by supervisors &management.Improve communications.Software training and process for desired employee training needs. | ongoing  |
| Implement cross training of staff to foster opportunities for staff and to increase the Agency’s flexibility in staffing programs by working with founders to allow cross work within and across programs | Human Resources DirectorDeputy CEODepartment Directors | This is being implemented and most staff are embracing it when given accurate information as to WHY this is being done.Improved retention.Improved morale with less stress.Culture of Teamwork and improved open communication. | ongoing |
| All management and supervisory personnel will receive training on all aspects of supervision as well as Civil Rights, EEOC, non-discrimination, safety and training programs. | Human Resources DirectorDeputy CEO  | Staff are assigned online eLearning, Department training sessions, and Staff Meeting presentations. | ongoing |
| Use of internal process/form is in place for Recruitment/Job Acquisition to streamline the process for all supervisors and Human Resources. | Human Resources Director | This was developed in early 2018 and being utilized by most leaders | ongoing |
| Have 5 staff begin 2019 CCAP process and at least 3 get certification | On staff CCAPs | 3 new CCAP’s in Chicago at National Convention  | June 2019 |
| Complete re-vamp Onboarding process to focus on Community Action, our mission, our agency THEN the specific role and HR P&P’s, benefits and employment specific information | CEOCCAPsHuman Resources Director | Have completely new onboarding process in place by 2/1/19 and then have entire staff go through it together | April 2019 |

**Operations**

|  |  |
| --- | --- |
|  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Actions/Tactics  | Who will see the Action is completed? | Measure | End Date |
| We will develop a set of criteria to evaluate the Programs of the Agency and to determine when a Program should be reduced or dropped in favor of another opportunity to serve clients in a more cost-effective and beneficial manner. | Deb | Each location will use a log book to track client needs/requestsA central database tool (CAPTAIN) has been installed. | This process will be ongoing. |
| We will have case managers/navigators in the times of life for participants: crisis, stable, improve. | Deb | Add 1 each – Crisis, Stabilize & Success Navigator, educate staff on using these Navigators | Currently have 2 Crisis Navigators in place |
| We will provide case management through all programs. The system should serve as a wrap-around service based on a screening and/or referral process. | Deb | Educate current case managers on Navigator process, and importance of utilizing the process | More programs utilized by clients |
| We will implement a data base that allows us to effectively “case management,” to accurately illustrate program outcomes and to comply with ROMA and ROMA-Next Gen. | Deb, Jaime, Cheryl | Secured database provider, training staff to utilize programCAPTAIN database in place | Provider secured, training will be a continuing process |
| Provide client tracking information for CSBG mid-year and annual report. Provide project annual service data for 2019 CSBG Community Plan  | Jaime/Shannon/Deb | CSBG mid year report, CSBG annual report  | Annual Report: March 20192019 CSBG Community plan-October 2019 |
| Maintain required grant/agency SAMS and DUNS information and keep up to date. | Jaime | Maintain agency DUNS information in SAM and Grants.gov | September 2019 and as needed |
| Gather information from key sectors of the community and current data from external sources such as the US Census, specific to poverty in our service area. Provide qualitative and quantitative data on Newcap’s geographic service area.  | CEO, Deputy CEO, Jaime | Complete and submit the 2018 NASCSP survey | March 2019 |
| Conduct Community Needs Assessment | CEO, Deputy CEO, Jaime, Consultant | Assessment completed and approved by P&E Committee and Full Board  | December 2019 |
| Institute combined intake to make sure that information is shared cross-agency about new client intakes to ascertain how to best assist them achieve their dreams | All program intake personnel | Meet at least bi-weekly to review, share, plan and cross-connect | Beginning late September 2018 |
| Become trained on and implement “Transitions to Success” across Newcap and then our service area | CEO Deputy CEODirector CHSNavigators | Training by TTS staff for 25 Newcap staff by 1/19Create 4 trainers, 4 instructors and 21 coachesDevelop a C.A.R.E. network across our region | Sign documents in October 2018 after results from “Stand Together” grant |
| Board Development | CEOBoard Executive Committee | Fully engage Board in committees and full cycle of change to be 100% in compliance with ROMA-Next Gen to develop Newcap as a CAA | Began in 9/18 |
| ROMA Next Gen & Community Action Training | CEOCCAPs | Bring in trainer for all staff and board on ROMA, cycle of change.Continue to train and educate on the community action movement | 11/19 and Ongoing |

**real estate division**

|  |  |  |  |
| --- | --- | --- | --- |
| Actions/Tactics  | Who will see the Action is completed? | Measure | End Date |
| Working with communities to define need and using both the results of our Community Needs Assessment, our conversations with community leaders and housing experts, we will develop affordable housing in communities of need. This will not only meet community needs, but give stable, non-grant streams of revenue to Newcap. | Jaime,CherylBob | Work with the City of Marinette, Baker Tilly, DNR, and other partners to remediate a site in the city of Marinette and then develop a 48-unit apartment designed to house workforce with set asides for homeless and LMI | July 2020 |
| Building on our Community Reinvestment Committees in the Cities of Oconto & Shawano as well as Langlade County, we will work on and repair aging, dilapidated housing to enable people to stay in their homes. We will expand this program to other communities as we establish a model & funding sources. Will work with HHR, READI, and other programs to continue funding.  | Jaime | Expand into Shawano county and work with USDA, Habitat for Humanity and other partners to develop a Rock the Block event and community volunteer activities. Seek out other funding sources whether administered by Newcap or other partners.  | September 2019 |
| Continue working on the READI project with the primary goals to facilitate economic development, job creation, and housing opportunities for low to moderate income (LMI). Develop application and tools to evaluate possible business ventures for business loans, tie in education opportunities and Investigate possible workforce housing redevelopment opportunities. We will establish revolving loan funds to continue READI eligible projects into the future. | Jaime, Bob, Cheryl | Continue working with DECHR and explore the opportunity to loan to Newcap Builds and other companies who are interested in expanding their business. Utilize the housing dollars to rehab and build affordable housing units |  |
| Ensure Properties are operating within compliance with all funders. Ensure rents and incomes remain within the prescribed HOME limits and that all tenants living in our properties are provided an environment which promotes peaceful enjoyment and a sense of community for tenants and our neighbors. | Jaime/Property Manager | Submit annual rent rolls and compliance reports to property funders. Supply all monitoring information to FHLB (AHP) State of Wisconsin (RHD), WHEDA, and any other funder. Adhere to affordability periods and all other requirements | June 2019 |
| Work with funders and appropriate partners to fund and build a LMI single family home utilizing an employment and training program trainees and Newcap Builds. Provide the homeowner with HHR subsidy | Jaime, Cynthia, Bob, Cheryl | Build a single family home and sell | December 2019 |
|  |  |  |  |

 **transportation**

|  |  |  |  |
| --- | --- | --- | --- |
| Actions/Tactics  | Who will see the Action is completed? | Measure | End Date |
| Increase the capacity of the “My Garage- A Community Project” program by 100% by adding additional counties: Oconto & Brown | peggy | Have state approved plans in place | 12/31/2019 |
| Explore and receive 3 additional funding sources for the My Garage- A Community Project” program | Peggy | Receive $5,000 in grant money | 12/31/2019 |
| Begin a accessible van transportation program with volunteer drivers  | Peggy | Providing accessible rides for residents of Oconto and Marinette Co | 9/1/2019 |
| Work and Wheels loans in 6 counties | Dave | Referrals from employers and HHSD in each county  | 12/31/2019 |
| Default rate of 10% or less in 2019 | Dave | 40% of participants take budgeting services | 10/25/18 |
| Work with the Menominee Tribe for WETAP funding in 2019 | Dave | An official agreement to allow us to seek funding with Tribal transit agencies | 9/5/18 |