**Newcap Plan of Action – 2018 - report out 9/15/2018**

**Asset development**

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| Actions/Tactics (including Metrics): (Twelve Months) | Who will see the Action is completed? | ImmediateGoal✓ | Measure | End Date | Results and explanation of variance |
| 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.

 Objective 2: Representative Payee –1. Start-up program for participants receiving SSI or SSDI to ensure that monthly benefits are being responsibly handled by the participant. Budget Counseling is a key piece to the success of each client’s goal of achieving a sustainable lifestyle.
 | Lisa Lisa | a: 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.b: Weekly outreach activities to engage local businesses, financial institutions, libraries, municipal entities, and peer community groups to host presentations.a: submission of the payee application to SSA. Update to CAPTAIN to provide for proper demographic reporting as required by SSA which exceeds ROMA requirements. Interviewing and choosing a local financial institution to facilitate ACH operations. Set-up in Newcap’s accounting system that meets SSA requirements. Internal strategy developed to meet the standards for employee facilitation of the program and completing the Bonding process. MOU’s with participating clients.b: Enrollment of payee participants begins.c: Initiate process of Bill Pay Program as enhancement to Representative Payee.d: Bill Pay launch  | a: A minimum of 15 new enrollees in Newcap’s Budget Counseling Program monthly.b: At minimum; 5 scheduled presentations per quarter.1. application approval

b: 10 payees enrolled additional 10 payees enrolled2 Bill Pay Participants | 12/181st QTR2nd QTR3rd QTR4th QTR | Staff person assigned took new position in February 2018. We are re-tooling and will evaluate this program and our capacity in 2019Jaime  |
| 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.  | Deb WiesnerFrom 9/15-on this is transitioning to Lynn Ratzburg | a: 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.  | 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. | 1st QTR 20182nd QTR3rd QTR4th QTR |  0 in quarter one0 in quarter two1. in quarter 3

10 enrolled, all still in program so no exits |
| CREATE YOUR OWN OPPORTUNITIES –Objective 1: Matching recognized community needs with prospective entrepreneurs. 1. These business opportunities would include CNA/In-home caretaker, transportation provider, and other service oriented business start-ups that require minimum capital and low overhead.

Objective 2: $20K Revolving Loan Fund & Micro-lending partnerships established.1. Solicit multi-year commitments of RLF funds from financial institutions and county ED’s.

 Objective 3: Education & Program Enrollment1. Entrepreneurship training program offered to area ED Boards and strategic partners assisting small businesses in their community.
2. All CYOO participants required to complete training curriculum.
 | Deb Wiesner – beginning 8/10 – on this has transitioned to Tanja SchneiderDeb Wiesner ­ beginning 8/10 – on this has transitioned to Tanja SchneiderDeb Wiesner \_ beginning 8/10 – on this has transitioned to Tanja Schneider | a: Monthly planned meetings with area Economic Development Boards and County Human Services Directors to develop needs-based entrepreneurship opportunities. (See Strategic Plan for Asset Development Program) More robust participation in GB Chamber, Oconto Chamber, Definitely DePere, Management Women, M&M Chamber, and Grow North.a: Monthly outreach to include 2 scheduled meetings with financial institutions large and small as well as READI Board Members.a: Web based, self-paced training program focused on best practices for start-up, expansion, HR and personnel, and QuickBooks.b: see above  | Schedule a minimum of 2 meetings with County ED and Human Services partners as mentioned monthly.In addition, attend a minimum of 2 meetings with ED Affiliates for the purpose of networking and referrals. A minimum of 6 prospective entrepreneur interviews per QTR. Two 3-year monetary commitments of $3K each to establish a RLF from financial institutions. 1 committed partnership for Micro-loan funds from a READI partner.Two additional 3-year monetary commitments of $3K each from financial institutions. 1 additional partnership for Micro-loan funds from a READI partner1. participants utilizing the training program as referral from strategic partners.

2 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 | Monthly and QTRLY goals to be met through 20181st QTR2nd – 4th QTR20181st QTR2nd QTR3rd QTR4th QTR | Currently compiling a list of contacts and reaching out to EDB members and CHSD requesting meetingsThree interviews with prospective participants scheduled by Tanja for Sept 18.Nothing transpired with this objective. We are reevaluating for 2019.Nothing happened with this objective. We are re-tooling for rest of 2018 and 2019. Effective training program requirements currently being re-defined and new format under development.1 business started in 1st quarter1 business started in 2nd qtr4 Active client files |
| 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 30% 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 EileenObjective 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.  | Deb Wiesner – after 9/14 will be Cynthia Patterson Eileen Gossen – 3/1/18 Lisa Christensen started | a: A minimum of 2 presentations at local financial institutions and mortgage providers quarterly. Continue to be the intake partner for the collaborative partnership.HOME/HHR Lending will be managed through the AD Division, construction/inspection/rehab process will be managed through the RE Division | 8 closed transactions12 closed transactions22 closed transactions 15 closed transactions5-7 completed Rehab projects completed. | 1st QTR2nd QTR3rd QTR4th QTR2nd and 3rd QTR | 1. closings 1st QTR

8 closings 2nd quarter17 closings 3rd quarter8 proposed We were awarded $250,000 for 2017-2018, which equates to 20 transactions possible for year if each is at $10,000. Then an additional $250,000 beginning 7/1/2018. The number of home closings beyond that were projected if two $10,000 loans per month were paid back as program income. 1. rehabs through 3rd QTR

6 projected 4th QTRNumber of presentations unknown |
| 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~~ Lisa Christenson. 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. | Deb Wiesner – after 9/14 – Lisa ChristensenEileen Gossen – after 3/1 Lisa Christensen | Minimum of 2 presentations at financial institution’s loss mitigation department leadership QRTLYQuarterly program assistance reminder emails and marketing handouts to all county Tax Collectors in footprint for referrals.Homebuyer Assistance offered if funds are left over at contract end date. | 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. | 1st, 2nd, 3rd, 4th QTR’s1st QTR2nd QTR3rd QTR4th QTR2018 | While we have been working with 15 requests since March 1st, due the requirements of the program and the clients situations, there is only one we are actively working with and about 6 prospective ones |

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| Actions/Tactics (including Metrics): (Twelve Months) | Who will see the Action is completed? | Measure | Dates | Results | EXPLANATION FOR VARIANCE |
| Outreach and recruit 160 customer for enrollment into services | Lynn Ratzburg | Monitor monthly  | 9/30/18 | 126 | Low unemployment & low number of dislocations & 3 months remaining for additional enrollments |
| Achieve a 90% credit attainment rate of those customers who exit the program  | Lynn Ratzburg | Quarterly monitoring | 9/30 | 20(91%) | 3 months remaining & numbers will increase with Dec graduates |
| Achieve a 85% entered employment rate for those Adults who exit program and 92% rate for those Dislocated Workers who exit the program | Lynn Ratzburg | Quarterly monitoring | 9/30 | Adult 12 (86%)DW 6(100%) | 3 months remaining to include those who obtain employment in the last quarter |
| Achieve Median Earnings increase after entry into employment of $12400 for Adults and $18500 for Dislocated Workers | Lynn Ratzburg | Quarterly monitoring | 9/30/18 | 2nd quarter for first quarter exits is 9/30/18 | DWD provides this data thru UI data base (2nd & 4th quarters after exit) |
| Achieve a 90% Retention Rate for Adults and 95% rate for Dislocated Workers who have entered employment | Lynn Ratzburg | Quarterly monitoring | 9/30/18 | 2nd quarter for first quarter exits is 9/30/18 | DWD provides this data thru UI data base (2nd & 4th quarters after exit) |
| 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 Ratzburg | Work with Navigator staff & use of agency referral process | 9/30/18 |  met | Common intake form in place for agency programs |

**Community Health Services**

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| Actions/Tactics (including Metrics): (Twelve Months) | Who will see the Action is completed? | ImmediateGoal✓ | Measure | End Date | RESULTS | EXPLANATION OF VARIANCE |
| Maintain and expand the number of clients served needing the Family Planning Only Services (FPOS) | Director/All CHS staff | ♪ | Monthly/yearly comparisons | Ongoing | Ongoing/met | With services being provided at all locations now, there has been an increase in the number of patients we are seeing, especially in our ER location.  |
| Maintain and expand the number of clients served needing the Sexually Transmitted Disease (STD) services. | Director | ♪ | Monthly/yearly comparisons | Ongoing | Ongoing/met | STDs are again on the rise as well as the number of patients seeking  |
| Maintain the Brown County Grant for the provision of STD services. Anticipated renewal 12/2019. | Director | ♪ | Monthly completion | Each Month | Ongoing/met | Renewal for grant to take place in December 2018 |
| Expand the provision of services to provide health care to the homeless. | Director |  | Decision to develop specific program for this population |  | Not met/ongoing | Lack of funding and resources in our area. TTS has been discussed to include additional funding and support for services needed. Nurse practitioner leaving resulted in the shift of scheduling for current NPs at various sites |
| Expand the provision of services to residents of public housing. | Director |  | Decision to develop specific program for this population |  | Not met/ongoing | Lack of funding and resources in our area. TTS has been discussed to include additional funding and support for services needed. Nurse practitioner leaving resulted in the shift of scheduling for current NPs at various sites.  |
| Addition of general wellness/”sick care” services by our mid-level practitioners in all locations. | Director | ♪ | NP Staff certified for this care | April | Met/ongoing | NPs have begun to provide wellness/sick care visits to clients. Staffing changes have resulted in shift of scheduling and locations. |
| Seek out and apply for at least three grants to supplement current programs or for the expansion of services. | Director/Grant Writer | ♪ | Ongoing |  | Met/ongoing | Title X and the Wisconsin Women’s Health grant were applied for. Received Women’s Health Grant. Waiting on announcement of fund allocation from Title X. Will continue to seek out and apply for additional funding. |
| Provide at least 2 educational outreach efforts regarding services provided and disease prevention in each community. | Staff at each clinic | ♪ | 2 scheduled programs per clinic | December | Met | Continued outreach efforts provided by each location.  |
| Provide at least one educational opportunity for each staff member of Community Health Services. | Director |  | 1 completed program per staff | December | Met | Member of CHS will attend HCET STD summit in October and the Dual Protection Conference in December. Additional funding provided by HCET for NP training.  |
| Collaborate with community entities and partners for continuity/exchange of services for our clients. | Director/Clinic Staff | ♪ | Quarterly meetings with community entities | ongoing | Met/ongoing | Ongoing collaboration with all county PHD. Community needs assessment for Marinette county completed.  |
| Set up Advisory Committee to evaluate and explore direction of NEWCAP Community Health. | Director |  ♪ | Quarterly meetings |  | Met /Ongoing | Ongoing leadership meetings and Department meetings occur on a regular basis. Input and communication with vice president. |
| Provide improved and comprehensive training for all current and new incoming CHS staff | Director |   ♪ | Staff feedback and performance reviews | Ongoing | Met |  |
| Work with community partners and learning from established programs, we will explore adding dental care to our health services division.  | Director & CEO |  |  | Ongoing | Ongoing/not met | Limited resources/funding in communities. Will continue to revisit with current expansion efforts |
| Evaluate current staffing levels/hours of operation at each location to ensure quality patient care while being fiscally responsible. | Director | ♪ | Budget comparisons and patient feedback | Ongoing | Met/ongoing | Eagle River and Oconto Locations are part time positions. Able to end contract with third party staffing agency for NP services |
| Ongoing budget analysis to see where clinic stands financially and add/remove expenses as needed while moving towards and maintaining positive accounts. | Director | ♪ |  | Ongoing | Ongoing/met | Streamlining and organizing ordering and inventory process to limit the amount of ordering items that are essentially wasted.  |
| Increase the number of accepted insurances to increase patient volume. | Director/Medical Billing Specialist | ♪ |  | Ongoing | Ongoing | Continued efforts with insurance companies are ongoing. Due to the nature of services provided and more than one taxonomy code, it has been difficult. |

**Energy Services**

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| Actions/Tactics (including Metrics): (Twelve Months) | Who will see the Action is completed? | ImmediateGoal✓ | Measure | End Date | results | explanation for variance |
|  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. |  | 389 Units/895 individuals |  | 320 Units/736 Individuals | Results data is for months of calendar year 2018, Jan – Aug.  |
|  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, 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. |  | 72 units/165 Individuals |  | 31Units/71 Individual | Results data is for 8 months of calendar year 2018, Jan – Aug.   |
| Energy Assistance Services – Forest CountySub-contract with Forest County to administer the Wisconsin Home Energy Assistance Program (WHEAP). Provide customer intake services, verify income and process applications for households in need of assistance with payment of their energy bills. | Energy Services Program Director,WHEAP Coordinator/Intake staff |  | 600 Households/1380 Individuals |  | 0  | Newcap did not provide Energy Assistance services in 2018, our subcontract with the County ended 9/30/17. Newcap did not renew a contract with Forest County to administer this program as it was not cost effective to do so.  |
| WHEAP Crisis Energy Assistance Services – Forest County Provide customer intake services, verify income and process applications for households in need of assistance with payment of their energy bills. | Energy Services Program Director,WHEAP Coordinator/Intake staff,  |  | 130 Households/299 Individuals |  | 0 | Newcap did not provide Crisis Energy Assistance services in 2018, our subcontract with the County ended 9/30/17. Newcap did not renew a contract with Forest County to administer this program as it was not cost effective to do so.  |
| 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 to process furnace referrals for households that are in need of furnace repairs or replacements | Energy Services Program Director, Administrative Staff, HVAC Technicians, HVAC Sub-Contractors, Final Inspector  |   | 155 Replacements/356 Individuals 220 Repairs/506 Individuals    |  | 72Replacements/166 Individuals118 Repairs/271 Individuals | Results data is for 8 months of the calendar year Jan – Aug. Oct – Dec are primary months for Emergency Furnace Referrals.  |

 **Finance**

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| Actions/Tactics (including Metrics): (Twelve Months) | Who will see the Action is completed? | ImmediateGoal✓ | Measure | Result |
| Accounting Software will be purchased and implemented which meets the needs of the organization. All end users will be properly trained in the use of the software prior to its implementation. | ~~Brandon Daul~~Lisa KlitzmanCathy Hoeft – as of 5/14/18 | 1. Identify cross-sectional project team.2. Identify project time line.3. Identify needs and wants with regard to the software.4. Research and identify a list (3-5) of vendors or software solutions that meet the requirements outlined in step 3.5. Perform demos with vendors to see how their software handles the key requirements defined in Step 3.6. Cross sectional team selects software. If a stalemate – CFO will make the choice.7. Work with Innova to implement the software and transfer historical data.8. Provide training to all end users prior to software testing.9. Run new software in parallel with existing software for one month to establish reliability and data integrity.10. Software go-live. | Accounting software is fully operational which meets the needs of NEWCAP. | Financial Edge-XT is 90% functional as of 9/1/2018. Payroll is in our old system until 1/1/19 to not risk payroll data and for time, we aren’t inputting 2018 budget data. Electronic PO system to be in place by 12/31/18 |
| We will provide training, information and financial expectations to directors, with respect to the Agency’s financial position and the overall Agency budget, on a regular schedule. Directors will be expected to share this information with their staff members. | ~~Brandon Daul~~Cathy Hoeft – as of 9/1/18 | 1. Finance will provide preliminary financial statements to Directors by the 15th of the month for the preceding month and final financial statements by the 22nd. 2. CFO will be available to answer questions and review as necessary. | 1. Financial statements are distributed on a timely basis.2. Directors provide feedback which indicates he/she understands the finances impacting their programs and NEWCAP. | In process, but yet not fully implemented |
| We will communicate funding issues with staff in terms of financial and budgetary issues, in order to openly discuss these issues and explore solutions as a team.  | ~~Brandon Daul~~Cathy Hoeft – as of 9/1/18And Cheryl Detrick | 1. On a monthly basis the Finance Director will review preliminary financial statements and identify potential budgetary issues. 2. Once an issue is identified it will be discussed with the CEO for discussion with directors ~~program director and his/her staff and a solution derived.~~  | 1. Budgetary issues are identified and resolved prior to final financial statement creation. | Because the system is not fully implemented as yet and as of 9/20/18 reports have still been incomplete, inaccurate and untimely, this has been very challenging to do with any clarity. |
| We will hold Directors accountable for successfully managing their budgets and meeting financial and performance goals.  | ~~Brandon Daul~~Cheryl Detrick | See 6.2 & 6.3Performance reviews will include a statement regarding the success and/or failure of the director to manage his/her budget. | Programs stay within their budgetary constraints in the line items over which directors have control. | Because the system is not fully implemented as yet and as of 9/20/18 reports have still been incomplete, inaccurate and untimely, this has been very challenging to do with any fairness as directors/VP’s aren’t getting timely information that is correct. |
| Departments will have an allocation within their budgets for the purpose of training, learning, and programming by the respective staff. | ~~Brandon Daul~~ CEO & Program Directors | 1. CEO will work with Program Directors to establish a training budget.2. Training/travel budgets will be reviewed as part of the monthly budgetary review process and issues identified and addressed. | Staff is adequately trained and programs stay within the training budget established. | Some training has happened, more is needed |
| We will seek to diversify our funding streams, so programs can become more cohesive and integrated.  | ~~Brandon Daul~~, Program Directors & CEO | 2017 – 1.Understand existing funding streams.2. Identify funding streams not currently utilized by NEWCAP.2018 – 1. Research additional funding streams identified in 2018 to determine if they are appropriate for NEWCAP.2. If applicable, start the process to gain access to/tap into additional funding streams.  | One additional funding stream is identified, researched, and accessed (if appropriate) by mid-2018. | Ongoing |

. **Food**

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| Actions/Tactics (including Metrics): (Twelve Months) | Who will see the Action is completed? | Date | Results & Variance |
| Get continuity within all NEWCAP pantries/ work with staff on **client relations** and community involvement. | Deb/Scott | On going | This is on going and still need for improvement due to changes in staff  |
| Work on balancing delivery schedule and taking enough time at each pantry. | Scott/Deb | x | As of 10/1/18, Newcap is no longer in the food distribution business and the food warehouse is in escrow. This will be a significant source of savings. Now that all counties are on a direct delivery model MGR will have more time to spend strengthening our outlet pantries. 2019 is set to be a record setting year with the amount of TEFAP bonus foods that we are to receive directly linked to trade mitigation. We need to come up with solutions on how to store the enormous amount of food that is expected. The ones with smaller pantries and storage space will be impacted the most and need to find alternative ways to assure this food reaches each county.  |
| Work on obtaining more donations for the three pantries. Either food or monetary. Get pantry staff involvement with this project. | Scott/Deb | On going | Recently added an additional Kwik trip store for the Oconto pantry as well as two stores in Marinette. We also gained another Walmart pick up.The Marinette food pantry is now back on track.Last year Kitty Kocol from DHS was strongly suggesting that we close the Marinette food pantry due to the drastic drop in clients during the 2016-2017 years. Upon staffing changes and treating the clients with respect and dignity, we have had an unprecedented increase in clients. In the past years the monthly count stayed steady at around 250 households monthly. Within the past 6 months we have seen the numbers increase to 645 households and increasing weekly. We have also increased our food donations in Marinette by picking up the addition of two Kwik Trip stores as well as Aldi’s. We have also gained another pick up day from Walmart which brings us to two day per week. This is also a cause for urgency as we need to secure more food to handle the influx. |
| Need to train Bob Johnson with TEFAP procedures and civil rights training. | Scott | x | Bob is an asset to the program. Hard working and efficient. |
| Need to build a better volunteer core in the Oconto office/ work on more community involvement.  | Scott/Deb | x | Now have 4 volunteers in Oconto pantry. |
| Become more knowledgeable with all aspects of the TEFAP program and management skills. Also educate myself in fundraising practices.  | Scott/Deb | x | Ongoing |

**Housing**

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| Actions/Tactics (including Metrics): (Twelve Months) | Who will see the Action is completed? | Date | Results |
| 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 | 12/31/19 | This is still a goal that we are seeking funding for as well as working to craft a solution will work with the barriers in place |
| WHEDA Housing Choice Vouchers | DEBBIE/ERIN | ongoing | 242 |
| Permanent Supportive Housing Project for families | DEBBIE | 12/31/19 | The project is in rehab stage due to zoning delays and we are hoping to begin housing by 11/1/19 |
| CoC Rapid Re-Housing Project for Youth | DEBBIE | 0 so far | This just project started 9/1/2018 – no youth housed yet |
| Emergency Transitional Housing | ERIN | ongoing | 40 |
| Permanent Supportive Housing HOUSING FIRST | KIM S. | 5 via spare time as receptionist | Funding ended 10/31/2017 |
| Permanent Supportive Housing BROWN COUNTY INDIVIDUALS | DEBBIE | ongoing | 46 (out of 45) served in 2018  |

**Human Resources**

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|  | Who will see the Action is completed? | ImmediateGoal & Measure | End Date | results | explanation of variance |
| 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 | -Plan and implement Listening Sessions across the agency.-Meeting Results/Accomplishments,-Surveys, -Comments,-Exit interviews,-Ongoing performance discussions. | 6/1/2019; Ongoing thereafter. | -Currently All Staff meetings are held and Department meetings encouraging questions;-Encouragement given during Onboarding -Exit interviews are utilized. | -In the planning and implementation phase.-Present meetings and Exit interviews are not solely for this purpose and needs focus to get desired results. |
| 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 | Plan and implement Staff Committee.- Meeting Results/Accomplishments.-Watch for a shift in moral and culture. | 9/1/2019Ongoing thereafter. | - Plan and implement.-H.R. will develop the framework for this in conjunction with management.-One on one conversations have been taking place.  | - Planning and implementation. |
| 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 | -Researching the pay scale and pay grades comparisons and development, exempt and non-exempt.-Exploring SHRM Resources.-National, state, and local average pay for similar positions and organizations/agencies …the triennial WISCAP wage survey – 2018. - and COLA. | Ongoing. | All turnover and new positions have taken this into account this year.-In the implementation phase for other positions. | Currently using COLA tied to performance and program/department budgets/funding. |
|  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 T. M. System was implemented and is being utilized for this purpose through the 360 reviews / evaluations (in process).-90 day and annual reviews /evaluations.-Periodic review of SHRM recommendations.-Consistent Comparisons throughout the organization.-Improvement in morale. | Ongoing; | -Currently in place and being utilized.-Not all performance reviews are done in a timely manner yet. | Currently in place and in the process of “catch up” by most departments. |

**real estate division**

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| Actions/Tactics (including Metrics): (Twelve Months) | Who will see the Action is completed? | ImmediateGoal✓ | Measure | End Date |
| 2.8. 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/Cheryl |  | Work with a developer to mentor us through this process. Then begin steps to develop Newcap into a non-profit housing developer – | On-going |
| 2.9 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 the Asset Development department and the HHR program to ensure funding.  | Jaime/ Deb W. | ✓ | Provide Community Reinvest activities to 10 households.Seek out other funding sources whether administered by Newcap or other partners.  | 6/14 and 6/16/2018 -Rock the Block Oconto (4 homes and 60 volunteers)8/16 and 8/17/2018 – Rock the Block Marinette (3 homes and 43 volunteers)On-going work with HHR program-Designed a advisory committee to discuss projects, concerns, etcSecured 3rd-party CDBG rehab contract with city of Marinette |
| 2.10 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/Janice | ✓ | Utilize our Community Development Organization and manage up to (3) CSBG-READI project review committees, and meet regularly to identify and fund shovel ready projects and housing development. Provide 2 viable business loans  | March 2018-June 2018Received board application approval in Feb. and March 2018Received one application and met with the READI planning committee. Continue working with county boards and the State |
| 2.12 To obtain an unduplicated count of the individuals and families that we serve and to more efficiently track multiple services received by individual households, we will begin utilizing an agency-wide client database.  | All Staff | ✓ | Continue entry into the CAPTAIN database. Enter all Real Estate clients into database and continue to utilize database for tracking rent payments, maintenance schedule, etc. | Feb – Sept 2018On-going supportCAPTAIN Superuser assigned – Shannon Martinson |
| 2.13Gather 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.  | Jaime/Deb B? | ✓ | Complete and submit the 2017 NASCSP survey | February 2018 |
| 2.14Maintain required grant/agency SAMS and DUNS information and keep up to date. | Jaime | ✓ | Maintain agency DUNS information in SAM and Grants.gov | When alerted of upcoming expiration |
| 2.15 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/Janice |  | Submit annual rent rolls and compliance reports to property funders. Keep all information up to date on tenants and property maintenance and repair. Supply all monitoring information to FHLB (AHP) State of Wisconsin (RHD), WHEDA, and any other funder. Adhere to affordability periods and all other requirements | Not sure of monitoring dates or properties for 2018 but will monitor budget and provide all required documents and electronic info as requested per funding source.Property Management Agency assigned July 1, 2018 will continue to provide reporting to State |
| 2.16 Provide client tracking information for CSBG mid-year and annual report. Provide project annual service data for 2019 CSBG annual plan | Jaime |  | CSBG mid year report, CSBG annual report  | Mid year report -June 2018Annual Report -Dec 2018 – March 20192019 CSBG annual plan-October 2018  |

**transportation**

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| Actions/Tactics (including Metrics):  | Who will see the Action is completed? | ImmediateGoal✓ | Measure | End Date | results | explanation of variance |
| We will work with community partners to develop and expand car purchase program to those who aren’t yet employed but would be if they had transportation | Dave | develop partnerships with employers by 3/14/17 | Have at least 2 active partnerships | 9/20/17 | We are still working for grants to be able to offer this service | Current funding source will not allow this. peggy has applied for new grants to make this possible. None have been awarded. Repo cars can be used in some cases |
| Working with community partners and funders, we will explore the creation of a sliding-fee scale automobile repair serviceRepair autos on sliding scale Begin repair autos | PeggyPeggy/Cindy Peggy | Develop partnership with area schools and tech school by 4/17/17Secure funding to pay staffingLocate/hire staff | Solid Commitment from group to partner- NWTC, and schools (in writing ) Funding commitmentAutos being repaired | 12/01/1710/1/1712/1/17 | Complete and expanding | The My Garage~ A Community Project is running in two locations. It’s been a very successful program and we are looking to expand this into more counties in 2019. Year to date 23 autos have been repaired |
| Begin transportation program to coordinate and augment existing transportation services in our communities. This community-based initiative will serve those who commute, the aging, disabled and low-income populations with cost-effective transportation  | Peggy | Volunteer handbook approved by 3/01/17 | Have a transportation base of 5 rides per week | 10/9/17 | Seeking a study | We are looking for an intern to complete a feasibility study for this service. Our current van is not fit to transport vulnerable people. To offer this service we would have to invest money into a new vehicle. We will wait for the study’s results  |
| Seek out and apply for 4 private foundation grants to supplement transportation programs | Peggy | First grant application complete by 4/03/2017 | Awarded one grant  | 9/01/17 | 3 have been applied as of 9/1/18 | I have applied for 3 as of today, working on one more! |
| Recruit a pool for volunteer drivers for transportation program  | Peggy | Have 4 volunteer drivers for transportation | Have volunteer drivers transporting  | 6/15/17 | 2 volunteers on board- waiting for study to continue to add to pool  | I have two people who are willing to volunteer to drive if this program is offered |
| Expand Work N Wheels to include 4 additional counties in NE Wisconsin | Dave | Make Contract w/ County agencies for referrals   | Receiving referrals from county contacts | 7/15/17 | complete | We have expanded Work N Wheels to 5 new counties |