Helping People Help Themselves

Past

Present

Oshkosh Office
2929 Harrison St.
Oshkosh, WI 54901
920-426-0150

Neenah Office
181 E. North Water St.
Suite 210
Neenah, WI 54956
920-725-2791

Berlin Office
237 Broadway
Berlin, WI 54923
920-361-9880

Prairie View Head Start
W911 State Highway 44
Markesan, WI 53946
920-398-3907
800-631-6617

Main Office
Fond du Lac Office
19 West First St.
P.O. Box 1108
Fond du Lac, WI 54936-1108
920-922-7760
800-631-7760

Annual Report 2013
Dear Friends,

ADVOCAP is pleased to present its 2013 Annual Report to the Community. ADVOCAP works to “Create Opportunities for People and Communities to Reduce Poverty and Increase Self Sufficiency.” In the pages that follow we provide a brief summary of the opportunities that we provided for individuals in our three county area. During the year ADVOCAP took on three projects that were formerly operated by other organizations: Senior Friends and a Special Needs Transportation program, as well as Bridges - an emergency needs program in Oshkosh. We also started a new community garden project in Ripon in collaboration with the City of Ripon and Fond du Lac County.

During the year, we also significantly increased our Employment and Training efforts. In collaboration with the Fox Valley Workforce Development Board, we expanded our Project Opportunity program and integrated a youth program and job center core services as part of our employment and training efforts. Our Fatherhood program increased in size and scope during that period as well.

ADVOCAP also works with our local communities in many partnerships. In partnership with local developers, housing projects were completed in both Berlin and Fond du Lac during 2013. In addition, a new housing project is underway in Ripon, and a second is planned. We are involved in housing coalitions throughout our three county service area, and have been working intensively with a self sufficiency coalition in Oshkosh.

ADVOCAP is a locally controlled, private not for profit corporation that seeks solutions to poverty at the local level in Fond du Lac, Winnebago and Green Lake Counties. We work here with you and partner organizations to achieve results. Our corporate decisions are made by a local board of directors with representatives from local government, local community leaders, and low income people who live here. We are your Community Action Agency.

We are grateful to our public funders, private donors, volunteers, and collaborative partners for supporting our efforts in providing solutions to poverty. With their help, we will continue to work toward reducing poverty and increasing self-sufficiency in the future.

Sincerely, on behalf of the ADVOCAP Board of Directors and Staff,

Michael Bonertz    Connie Anderson
Executive Director    President, Board of Directors

On the cover: Neighborhood Revitalization project in Fond du Lac - Past and Present pictures.
New homes built by Fresh Start
6,564 children, youth and adults served

42% were male and 58% were female

**Age Groups Served**
- 30% 0 - 17
- 7% 18 - 23
- 24% 24 - 44
- 8% 45 - 54
- 31% 55 +

**Federal Poverty Guidelines for Annual Gross Income***

<table>
<thead>
<tr>
<th>Family Size</th>
<th>100% of poverty</th>
<th>150% of poverty</th>
<th>200% of poverty</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 person</td>
<td>$11,170</td>
<td>$16,755</td>
<td>$22,340</td>
</tr>
<tr>
<td>2 people</td>
<td>$15,130</td>
<td>$22,695</td>
<td>$30,260</td>
</tr>
<tr>
<td>3 or more</td>
<td>$19,090</td>
<td>$28,635</td>
<td>$38,180</td>
</tr>
<tr>
<td>4 or more</td>
<td>$23,050</td>
<td>$34,575</td>
<td>$46,100</td>
</tr>
</tbody>
</table>

**Income Level Served**
- 50% 50%
- 24% 14%

**Education Levels Served**
- 4% Eighth grade or less
- 14% Non high school graduate
- 54% High school graduate/GED
- 15% Some post secondary education
- 10% Two or four year college graduate

**Family Types Served**
- 43% One person household
- 20% Single parent household
- 20% Two parent household
- 14% Two adults with no children
- 3% Other

*According to the 2010 US Census, 31,642 individuals live at or below 100% of poverty in ADVOCAP's three county area.

**BOARDS OF DIRECTORS**

**FOND DU LAC COUNTY**
- William Albrecht
- Mary Bingen
- Donna Blend
- Jim Chatterton
- Tom Dornbrook
- Ted Eisch
- Robert Giese
- Sr. Caryl Hartjes
- Natalie Lambert
- Paul Levandowski
- Alejandra Lopez
- Anne Paradies
- John Schneider
- Jessica Sheperd
- Don Skog
- Richard Wetzel
- Gary Will

**WINNEBAGO COUNTY**
- Darlene Bilstad
- Christine Kniep
- June Kriegel
- Larry Lautenschlager
- Norman Leatherwood
- Susan Locke
- Ann Marshall
- Mark Mayer
- Carol Miller
- Mike Norton
- Doug Pearson
- Marissa Reynolds
- Latrayia Spivey
- Chuck Tews
- Tom Widener

**GREEN LAKE COUNTY**
- Connie Anderson
- Joe Gonyo
- William Wuske
AFFORDABLE HOUSING

Having safe, decent and affordable housing provides stability to households. It allows individuals to find and keep employment, and meet the health, safety and educational needs for individuals. ADVOCAP is proud to provide multiple housing programs to the people in its service territory.

Rental Properties owned by ADVOCAP are available to low income persons and families. Units are rented to persons coming out of homeless shelters, persons with disabilities, large families, and single persons.

Home Ownership provides opportunities for people to learn about home ownership and how to acquire a home of their own, and it may provide down payment assistance to qualified buyers.

Home Rehabilitation is an opportunity for persons to maintain their homes in a safe and decent condition. ADVOCAP works with eligible homeowners by performing an inspection and scope of work, and providing financial assistance to qualified persons.

AHEAD provides budget counseling and financial assistance to eligible households who are at risk of foreclosure.

Homeless Services works with homeless persons in developing a personalized self-sufficiency plan addressing their needs and barriers, and connecting them to community resources.

Fresh Start is a program for young adults to work on employability skills while they build a house. Through intensive individualized goal setting, education opportunities, employability and life skills training, successful participants increase the probability of their self-sufficiency.

PASS (People Achieving Self-Sufficiency) provides personalized case management to identify the needs of persons experiencing multiple barriers to self-sufficiency. Assistance is provided to connect people to appropriate mainstream resources in Winnebago County.

Bridges is an emergency assistance program that provides eligible clients with direct financial assistance to pay rent, utilities, car repairs, work related clothing, gas cards or bus passes. Referrals may also be made to resources within the community that can assist individuals with a variety of needs, or may connect them to the PASS program.

WEATHERIZATION

The Weatherization Assistance Program reduces energy costs for low-income households by increasing the energy efficiency of their homes, while ensuring their health and safety. The burden of high utility costs often force low-income households into choosing between heat and other necessities. Weatherization reduces utility costs year round and provides long term relief from expensive energy bills.

Home Energy Plus Furnace Program The Home Energy Plus Furnace Program is a year round program that provides assistance to eligible low-income households when the primary heating system no longer provides heat, is inoperable, or becomes unsafe.

Weatherization Impact

342 low income, elderly and disabled households received Weatherization services

123 low income homeowners received emergency heating system repairs or replacements

“I could have never afforded to do this myself. I just needed some help with my utility bills after losing a job - I never expected all I got. Thank You.”

“This was a very positive experience for me. All workers at ADVOCAP and the people who came to my house were great. Thank you so much.”

“My comfort level in my house has improved 100% since the weatherization process has started and my energy bills have steadily went down! This has truly made my life better!”

Blower door testing being performed by an ADVOCAP Field Technician.
EMPLOYMENT & TRAINING
Access to employment is critical for an individual’s and family’s economic self-sufficiency. The local economy is also strengthened when individuals transition from receiving public assistance to becoming tax-paying citizens.

Project Opportunity assists low-income adults and dislocated workers to obtain training and jobs through area job centers.

Youth Employment Programs assist low-income youth to obtain education and employment.

Refugee Programs offer comprehensive social services, pre-employment training, job placement assistance and translation help.

GED and HSED Preparation provides pre-tests and one-on-one instruction for individuals working to obtain a high school equivalency certificate.

Father and Family Stability Project offers opportunities for fathers to obtain pre-employment skills training, paid work experience, occupational skills training, on-the-job training, and job placement assistance while strengthening family relationships.

Pre-Employment Services provide support through area job centers and job placement assistance for special needs populations.

Skills Enhancement helps participants who are working part-time develop new skills or enhance current skills in order to increase their wages and secure paid benefits.

VOLUNTEER SERVICES
Poverty is greatly reduced when organizations that serve low income populations have the resources to deliver needed services. It is also reduced when low income seniors are given the opportunity to supplement their income through service to vulnerable children.

Retired & Senior Volunteer Program (RSVP) taps the experience, skills, and talents of older citizens to meet community needs through volunteerism. Volunteers help non-profits and social service agencies fulfill their missions by performing tasks critical to the delivery of services. Organizations are able to improve the quality of services, free up paid staff time, expand the types of services available to clients, increase the number of clients served and increase public support for programs.

Foster Grandparent Program enriches the lives of exceptional needs children in schools, daycares and after school programs by helping them learn to read, providing one on one tutoring, and serving as a role model, mentor and friend. In addition, low income seniors receive a stipend that supplements their fixed income and helps provide for their basic needs.

Senior Friends Program provides friendship and support to older persons living independently in our community. A Senior Friend participates in person-to-person visits with an older adult who needs companionship to fight off loneliness and isolation.

Road to Work Refugee Job Club

Employment & Training Impact
569 unemployed people enrolled in employment training programs
266 individuals obtained unsubsidized employment
106 individuals obtained employment with benefits
72 individuals received assistance with fees and materials for post-secondary education
62 individuals who participated in GED/HSED classes increased their academic skills by at least two grade levels
56 adults received their GED or HSED
130 refugees received comprehensive services
163 fathers participated in responsible parenting events

Winnebago County Transportation Program provides transportation to individuals who participate in Winnebago County Programs. Volunteers use their personal vehicle to transport individuals in need to various appointments throughout Winnebago County and beyond.

Volunteer Services Impact
523 RSVP volunteers provided 60,954 hours of assistance to 88 non-profit organizations.
47 income eligible Foster Grandparent volunteers received a small stipend to provide 37,026 hours of assistance to 17 local schools, daycare and after school programs.
97% of the elementary school children who received services from a Foster Grandparent volunteer showed improvement in basic education.
BUSINESS DEVELOPMENT

Low income entrepreneurs do not have the financial resources to realize their dream of starting a small business. Given the opportunity, individuals create businesses that utilize their talents and benefit the local economy through taxes and job creation.

Business Development provides entrepreneurs with tools to insure that their small business is successful. They receive counseling and support in the following areas: business and financial plan development, marketing plan development and implementation, employee recruitment assistance, managerial evaluation, and small business micro loans.

Transportation to get to work, school, and services is an intricate part of becoming self-sufficient. Securing affordable, reliable transportation can be a challenge to low income individuals and families, especially those who live in rural areas.

Work-n-Wheels Program is designed to help employed eligible families and individuals obtain or repair a dependable vehicle for work-related needs where public transportation is not a viable option. The program also provides assistance to regain a driver’s license or car registration.

Business Development Impact
94 individuals received business development assistance
46 new businesses started/expanded
56 new jobs created or sustained
31 people received car loans
15 people received repair assistance

“I am very happy to say that I was the 100th person to receive help from ADVOCAP’s Work-n-Wheels Program. For 3 years I was unable to get to and from work, daycare and my children’s school without relying on rides from friends, family and taxi cab services. I lost multiple jobs due to tardiness. My children were late for school a lot and at times my babies weren’t able to get to daycare which resulted in a high daycare bill. My children were very excited when we got our car, they finally would be able to attend extra activities and get to and from their destination without stress. I want to say thank you for helping my family with a vehicle. You have changed our lives for the better.” - Jennifer

HEAD START

Children whose parents are involved in their education are more likely to perform well in school and break the cycle of poverty. In turn, parents who receive support for their individual and parenting goals are able to strengthen the family as a whole and work towards self-sufficiency.

School Readiness is achieved through comprehensive child development services. Children ages 3 to 5 develop the skills and confidence they need to be successful in school through an emphasis on social, physical, emotional, and cognitive growth.

Family Wellness ensures that all child health concerns are identified and children and families are linked to an ongoing source of continuous, accessible care to meet their basic health needs.

Parent and Family Engagement supports family well-being, builds strong relationships between parents and their children and encourages ongoing learning and development.

Community Partnerships are formed to provide high level services to children and families, to foster the development of family centered services, and to advocate for a community that shares responsibility for the healthy development of children and families.

For KEEPs (Kids Environmental Experience Program) is an environmental education program that provides opportunities for children to experience nature outside the classroom.

Head Start Impact
464 children and their families received comprehensive development services
185 parents participated in educational opportunities including ESL and GED preparation
53 fathers attended activities with their children
FOOD & NUTRITION

Food security exists when all people, at all times, have physical, social and economic access to sufficient, safe and nutritious food to meet their dietary needs and food preferences for an active and healthy life. For those living in poverty, food security is often compromised.

Hunger occurs when individuals reduce the number of meals they eat because they can’t afford food. When income is at or below the poverty level, individuals and families may need to juggle what little money they have to meet basic needs such as rent, medicine, and utilities.

“\textit{I would not be able to maintain a healthy diet without the program.}”

Senior Nutrition Program eliminates isolation and preserves the dignity, health and independence of the elderly by providing a daily nutritious meal. Meals are delivered to homes and are also served at congregate meal sites throughout Winnebago County. In addition, weekend meals are provided to those who need them, especially the homebound.

Community Gardens provide opportunities for individuals and families in the Ripon area and in Winnebago County to grow their own food and decrease overall household expenses.

Food Pantries receive commodity food through The Emergency Food Assistance Program administered by ADVOCAP. Food is distributed to qualifying families and ensures that children and adults do not go hungry.

FINANCIAL REPORT

### Assets

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash &amp; Equivalents</td>
<td>$ 856,945</td>
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<tr>
<td>Accounts Receivable</td>
<td>3,558</td>
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<tr>
<td>Receivable from Funding Agencies</td>
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<td>Material and Work in Progress Inventories</td>
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<tr>
<td>Prepaid Expenses</td>
<td>45,306</td>
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<tr>
<td>Investment in Subsidiaries</td>
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<tr>
<td>Land, Building and Equipment (net)</td>
<td>3,304,708</td>
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<td>Micro Loans to Small Business</td>
<td>414,789</td>
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<tr>
<td>Homeowner Loans (net)</td>
<td>4,668,317</td>
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<tr>
<td>Auto Loans</td>
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<tr>
<td><strong>Total Loans Receivables</strong></td>
<td>5,293,425</td>
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<tr>
<td><strong>Total Assets</strong></td>
<td>$ 11,248,877</td>
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### Liabilities & Net Assets

### Liabilities

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<th>Description</th>
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<tbody>
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<td>Program Advances</td>
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<tr>
<td>Accounts Payable</td>
<td>520,322</td>
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<tr>
<td>Accrued Payroll and Other Expenses</td>
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<td>Line of Credit</td>
<td>291,394</td>
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<td>Mortgages Payable</td>
<td>1,832,447</td>
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<tr>
<td>Deferred Revenue</td>
<td>218,011</td>
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<tr>
<td><strong>Total Liabilities</strong></td>
<td>$ 3,978,560</td>
</tr>
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### Net Assets

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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<tr>
<td>Temporarily Restricted</td>
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<tr>
<td>Unrestricted</td>
<td>709,127</td>
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<tr>
<td><strong>Total Net Assets</strong></td>
<td>7,270,317</td>
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### Revenues & Resources

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Government Awards</td>
<td>$ 11,352,527</td>
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<tr>
<td>Program Revenue</td>
<td>262,465</td>
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<tr>
<td>Other Services</td>
<td>682,216</td>
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<tr>
<td>Corporate Funds</td>
<td>60,000</td>
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<tr>
<td>Investment Return</td>
<td>24,590</td>
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<tr>
<td>Contributions</td>
<td>228,816</td>
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<tr>
<td>Commodities</td>
<td>507,342</td>
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<tr>
<td>In Kind Donations</td>
<td>81,828</td>
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<tr>
<td>Gain (loss) on disposal of fixed assets</td>
<td>(25,924)</td>
</tr>
<tr>
<td><strong>Total Revenues</strong></td>
<td>$ 13,173,860</td>
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</tbody>
</table>

2013 Funding

- 3% Business Development Services*
- 3% Volunteer Services
- 11% Food & Nutrition
- 17% Employment & Training
- 15% Affordable Housing & Fresh Start*
- 22% Head Start Program
- 29% Weatherization

*Does not include loan activity.

This report was assembled by ADVOCAP Inc. Our annual agency wide audit was conducted by the independent CPA firm Hawkins Ash CPAs and is available for inspection at ADVOCAP offices. There were no questioned costs on any of the contracts or grants for services administered by ADVOCAP in 2013.
How We Provide Services

ADVOCAP services are provided to qualified persons on the basis of expressed and assessed needs and within the limits of grant guidelines. We are committed to providing equal opportunity in all programs, services and activities to persons with limited English proficiency (LEP). Services include providing written translation and oral interpretations, free of cost, to LEP persons to ensure meaningful, accurate, and equal access to programs, benefits, and activities. We make reasonable accommodations for persons with disabilities. No qualified persons shall be excluded from participation in our programs or be denied the benefits of, or otherwise be subject to discrimination in any manner on the basis of age, race, creed, religion, color, sex, physical condition, handicap or disability, developmental disability, association with a person with a disability, sexual orientation, national origin, ancestry, political affiliation, marital, parental or familial status, pregnancy, arrest record, citizenship status, veteran status or any other characteristic protected by law. ADVOCAP is an equal opportunity employer functioning under an Affirmative Action Plan. We make a concerted effort to conduct business with small companies, women and minority-owned businesses, and companies compliant with civil rights laws. (Ref. 29CFR Part 471, Appendix A to Subpart A). We have a grievance procedure. If you have concerns or a complaint, please contact ADVOCAP’s Executive Director or Deputy Director.

EXECUTIVE MANAGEMENT

Executive Director
Michael Bonertz

Deputy Director
Tony Beregszazi

Finance Director
Tanya Marcoe

Investors & Donors

Agnesian HealthCare, Inc.
Alliant Energy Foundation
American Bank
American Legion
Anonymous
Berlin Area School District
BCI Burke Co.
James Bohr Memorial
Michael Bonertz
C.D. Smith Construction Inc.
Catholic War Veterans—Good Shepherd Post 1329
Charity Club, Inc.
Church World Services Inc.
City of Appleton
City of Fond du Lac
City of Neenah
City of Oshkosh
Commonwealth Development
The Corps Network
Farmers & Merchants Bank
Farmers State Bank
First Presbyterian Church
Focus on Energy
Fond du Lac County
Fond du Lac County Dress Down Days
Fond du Lac Evening Lions
Fond du Lac Morning Rotary Foundation
Fond du Lac School District
Fox Valley Savings Bank
Fox Valley Workforce Development Board, Inc.
Gannett Foundation
General Mills
Grande Foundation
Green Bay Packers Foundation
Green Lake County
Green Lake County/Ripon Community Foundation
Green Lake Rotary Club
Esther Hassman Memorial
Housing Partnership of the Fox Cities
IRIS Financial Services Agency
J. F. Ahern Co.
J. J. Keller Foundation, Inc.

Kiwanis Club of Fabulous Fond du Lac Foundation
Kiwanis Club of Fond du Lac Foundation Fund, Inc.
Knights of Columbus-Fond du Lac
Eugene and Natalie Lambert
Landmark Foundation
Mercury Marine
Menasha Corp.
Mid-States Aluminum Foundation
National Exchange Bank
Nielsen Cares Charity Committee
North Fond du Lac School District
Oberrech Foundation
Open Circle Unitarian Universalist Fellowship
Oshkosh Area Community Foundation
Oshkosh Family, Inc.
Oshkosh Housing Authority
Our Saviour’s United Church of Christ
Partners for Community Development
Ripon Area School District
Ripon Kiwanis Club Foundation
Sadoff Family Foundation
Salvation Army
Service League of Fond du Lac
SIGMA
Solutions Center
St. Vincent DePaul – Oshkosh
Stone Foundation, Inc.
U.S. Dept. of Agriculture
U.S. Dept. of Health and Human Services
U.S. Dept. of Housing and Urban Development
U.S. Small Business Administration
United Way Fox Cities
United Way Oshkosh
Walmart
WHEDA Foundation
Winnebago County
WISCAP
Wisconsin Dept. of Administration
Wisconsin Dept. of Children & Families
Wisconsin Dept. of Corrections
Wisconsin Dept. of Health Services
Wisconsin Dept. of Public Instruction
Wisconsin Dept. of Transportation
Wisconsin Dept. of Workforce Development
Wisconsin Division of Energy
Wisconsin Energy Conservation Corporation
World Relief

ADVOCAP is a private 501(c)(3) non-profit charitable organization.

ADVOCAP makes every effort to ensure that all names are included, spelled correctly, and listed accurately. If there are any omissions or errors in spelling or listing, please call 920-922-7760 so that we may correct our records.