



# *Helping People Help Themselves*

Annual Report 2013

## *Past*



## *Present*



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

**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



## *Our Mission:*

*To create opportunities for people and communities to reduce poverty and increase self-sufficiency.*

## **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  
Executive Director



Connie Anderson  
President, Board of Directors

*“The Fatherhood program has helped me become a better father.”*

*“ADVOCAP changed my life. Thank you for believing in me, and all the support you’ve shown me. I couldn’t have done it without you.”*

*“I was able to start my life over and achieve certain educational goals.”*

*“Thank you for helping with my business plan. Without your technical expertise I would probably still be “spinning in circles.”*

*“I could tell a difference right away when the house was re-insulated.”*

On the cover: Neighborhood Revitalization project in Fond du Lac - Past and Present pictures.  
New homes built by Fresh Start

# FACES OF ADVOCAP

## Age Groups Served



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

## Federal Poverty Guidelines for Annual Gross Income\*

Family Size	100% of poverty	150% of poverty	200% of poverty
1 person	\$11,170	\$16,755	\$22,340
2 people	\$15,130	\$22,695	\$30,260
3 people	\$19,090	\$28,635	\$38,180
4 people	\$23,050	\$34,575	\$46,100
<b>Income Level Served</b>	<b>50%</b>	<b>24%</b>	<b>14%</b>



## BOARD OF DIRECTORS

### FOND DU LAC COUNTY

William Albrecht  
 Mary Bingen  
 Donna Blend  
 Jim Chatterton  
 Tom Dornbrook  
 Ted Eischeid  
 Robert Giese  
 Sr. Caryl Hartjes  
 Natalie Lambert  
 Paul Levandowski  
 Alejandra Lopez  
 Anne Paradies  
 John Schneider  
 Jessica Sheperd  
 Don Skog  
 Richard Wetzell  
 Gary Will

### WINNEBAGO COUNTY

Darlene Bilstad  
 Christine Kniep  
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 Larry Lautenschlager  
 Norman Leatherwood  
 Susan Locke  
 Ann Marshall  
 Mark Mayer  
 Carol Miller  
 Mike Norton  
 Doug Pearson  
 Marissa Reynolds  
 Latrayvia Spivey  
 Chuck Tews  
 Tom Widener

### GREEN LAKE COUNTY

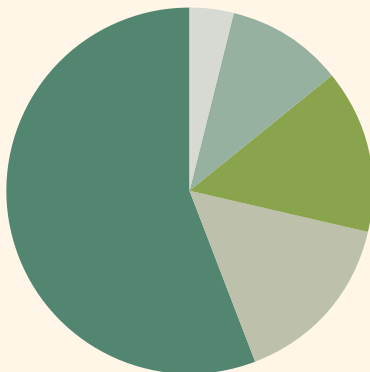
Connie Anderson  
 Joe Gonyo  
 William Wuske



**6,564** children, youth and adults served

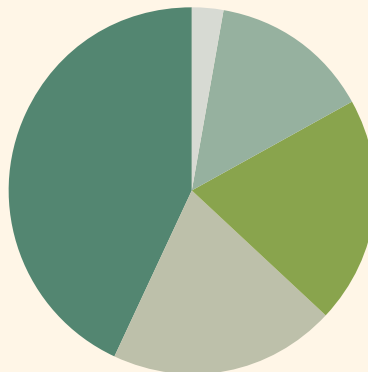
**42%** were male and **58%** were female

## 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.





## 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.



Fresh Start team at ribbon cutting ceremony, 210 Park Ave., Fond du Lac

## Affordable Housing Impact

- 6** families purchased a home
- 141** homeless households received intensive case management to assist them to overcome barriers
- 86** formerly homeless households moved from transitional housing and secured permanent rental housing.
- 61** units of affordable housing were created by ADVOCAP in partnership with investors and other collaborators.
- 304** households were assisted in the first six months of the Bridges program being operated by ADVOCAP

## 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.

# ADVOCAP programs reduce poverty and increase self-sufficiency.

## 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.



RSVP Volunteer working at the Salvation Army food pantry

## 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.



Motion Works Physical Therapy Neenah  
Business Micro-loan Recipient

### 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



# ADVOCAP programs reduce poverty and increase self-sufficiency.

## 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.

*"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.



## Food & Nutrition Impact

- 1,173** elderly and disabled adults were served nutritious meals
- 53,297** meals were served at congregate meal sites
- 54,887** home delivered meals served
- 403** homebound persons received daily safety checks
- 100** households raised fresh produce through community gardens
- 1.74** million lbs. of donated and federal commodity food distributed through area food pantries and feeding programs

## FINANCIAL REPORT

### Assets

Cash & Equivalents	\$	856,945
Accounts Receivable		3,558
Receivable from Funding Agencies		1,379,844
Material and Work in Progress Inventories		353,793
Prepaid Expenses		45,306
Investment in Subsidiaries		11,298
Land, Building and Equipment (net)		3,304,708
Micro Loans to Small Business		414,789
Homeowner Loans (net)		4,668,317
Auto Loans		210,319
Total Loans Receivables		5,293,425
<b>Total Assets</b>	<b>\$</b>	<b>\$ 11,248,877</b>

### Liabilities & Net Assets

#### Liabilities

Program Advances	\$	564,048
Accounts Payable		520,322
Accrued Payroll and Other Expenses		552,338
Line of Credit		291,394
Mortgages Payable		1,832,447
Deferred Revenue		218,011
<b>Total Liabilities</b>	<b>\$</b>	<b>\$ 3,978,560</b>

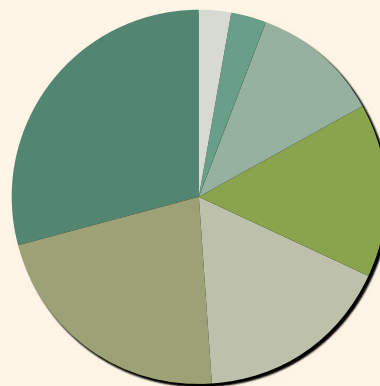
#### Net Assets

Temporarily Restricted	\$	6,561,190
Unrestricted		709,127
<b>Total Net Assets</b>		<b>7,270,317</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$</b>	<b>\$ 11,248,877</b>

### Revenues & Resources

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

### 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.



## 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 Co-op  
 Mercury Marine  
 Menasha Corp.  
 Mid-States Aluminum Foundation  
 National Exchange Bank  
 Nielsen Cares Charity Committee  
 North Fond du Lac School District  
 Oberreich 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

## EXECUTIVE MANAGEMENT

### Executive Director

Michael Bonertz

### Deputy Director

Tony Beregszazi

### Finance Director

Tanya Marcoe

### *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 law. (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.



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.

