



# *Helping People Help Themselves*

Annual Report 2014



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*On March 7, 2015, Rosalie Tryon Barber, founder and first Executive Director of ADVOCAP, Inc., passed away peacefully in Fond du Lac, Wisconsin.*

*In 1965 in Fond du Lac, Wisconsin, an energetic and dedicated Rosalie Tryon heard about the War on Poverty and the local agencies that would fight poverty on the local level. With her trade-mark "can do" attitude and boundless enthusiasm, she set about creating the "Fond du Lac Area Economic Opportunity Community, Inc" that would later be renamed ADVOCAP, Inc.*

*Rosalie was always proud of her role as a founder of ADVOCAP and Co-founder of WISCAP. She remained committed to the mission of community action's anti-poverty role throughout her life. Rosalie Tryon Barber made a difference in the lives of low-income people and the communities in which they live. We are proud to call her "the mother of ADVOCAP." Our world is a better place because of her life's work and our world will miss a true community action pioneer.*

On the cover: Participants of Employment & Training and Fatherhood Programs

## ***Our Mission:***

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

## **Dear Friends,**

ADVOCAP is pleased to present its 2014 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. The year 2014 was characterized by increased need, and increased services along with some increased investment in our communities with community partners.

In 2014, we were able to increase Employment and Training Services, particularly among youth, and we saw an increase in services that provide for emergency needs and longer term self sufficiency assistance. ADVOCAP was awarded the Governors Award for Excellence in Community Action for its Father and Family Stability Project which was in its third year.

ADVOCAP's partnerships in creating affordable housing in 2014, included the completion of the Jefferson Street Apartments in Ripon in collaboration with the Commonwealth corporation. We were also awarded tax credits for an additional partnership with Commonwealth. Newbury place will convert an old hospital into affordable housing in Ripon. ADVOCAP also purchased its office facility in Berlin which allowed us to expand the Berlin Job Center in partnership with the Fox Valley Workforce Development Board.

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

# FACES OF ADVOCAP

## Age Groups Served



- 31% 0 - 17
- 7% 18 - 23
- 26% 24 - 44
- 8% 45 - 54
- 25% 55 +

## Federal Poverty Guidelines for Annual Gross Income\*

Family Size	100% of poverty	150% of poverty	200% of poverty
1 person	\$11,770	\$17,655	\$23,540
2 people	\$15,930	\$23,895	\$31,860
3 people	\$20,090	\$30,135	\$40,180
4 people	\$24,250	\$36,375	\$48,500
<b>Income Level Served</b>	<b>51%</b>	<b>23%</b>	<b>13%</b>



## 2014 BOARD OF DIRECTORS

### FOND DU LAC COUNTY

William Albrecht  
 Mary Bingen  
 Donna Blend  
 Jim Chatterton  
 Tom Dornbrook  
 Ted Eischeid  
 Mary Fleischman  
 Robert Giese  
 Sr. Caryl Hartjes  
 Natalie Lambert  
 Paul Levandowski  
 Alejandra Lopez  
 Anne Paradies  
 Whitney Pultz  
 Jennifer Schaefer  
 John Schneider  
 Don Skog  
 Bill Steimel  
 Gary Will  
 William Wuske

### WINNEBAGO COUNTY

Darlene Bilstad  
 Christian Harpt  
 Christine Kniep  
 June Kriegel  
 Larry Lautenschlager  
 Norman Leatherwood  
 Susan Locke  
 Ann Marshall  
 Mark Mayer  
 Carol Miller  
 Mike Norton  
 Dorothy Nottleson  
 Joe Preisler  
 Koby Schellenger  
 Latrayvia Spivey  
 Chuck Tews  
 Tom Widener

### GREEN LAKE COUNTY

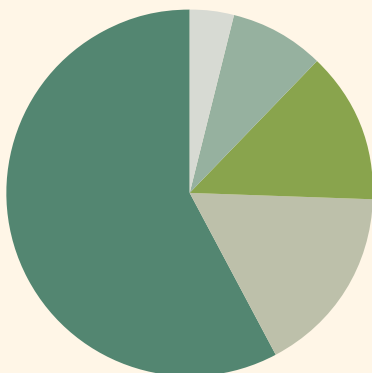
Connie Anderson  
 Joe Gonyo



**7,856** Individuals served

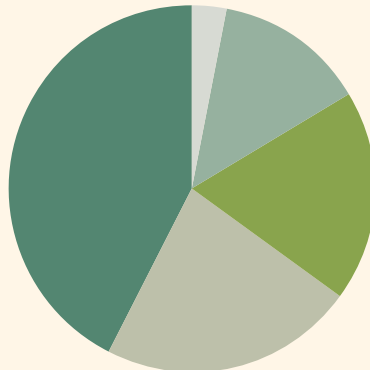
**43%** were male and **57%** were female

## Education Levels Served



- 4% Eighth grade or less
- 13% Non high school graduate
- 56% High school graduate/GED
- 16% Some post secondary education
- 8% Two or four year college graduate

## Family Types Served



- 41% One person household
- 22% Single parent household
- 18% Two parent household
- 13% 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 their health, safety and educational needs. ADVOCAP is proud to provide multiple housing programs to the people in its service territory.

**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.

**Home Ownership** provides opportunities for people to learn about home ownership and how to acquire a home of their own. Down payment assistance is available 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 for home repairs.

**AHEAD** provides financial assistance and budget counseling 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.

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

**PASS** (People Achieving Self-Sufficiency) provides personalized coaching to identify the needs of persons experiencing barriers to self-sufficiency, and 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.



Fresh Start participants successfully complete Rent Smart

## Affordable Housing Impact

- 25** units of affordable housing were created.
- 128** homeless households were served
- 74** secured permanent housing
- 38** live in transitional housing
- 83** people met with staff to work on self sufficiency goals in the PASS program
- 103** units of housing were retained or improved through ADVOCAP's rental, home buyer and home rehab programs.
- 1320** Winnebago County residents received emergency financial assistance through the Bridges 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.

*"We are all so thankful and thrilled to have all this happen...I believe this experience is going to really improve our lives."*

*"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."*

*"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."*

*"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!"*



Weatherization Specialist installing exterior wall insulation

## Weatherization Impact

- 214** low-income, elderly, and disabled households received Weatherization services
- 80** low-income, elderly, and disabled households received Limited Weatherization services
- 157** low-income homeowners received emergency heating system repairs or replacements

# ADVOCAP programs reduce poverty and increase self-sufficiency.

## EMPLOYMENT & TRAINING

Access to employment is critical for a household's self-sufficiency. The local economy is 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, work experience, pre-employment skills, and obtain employment.

**Refugee Programs** through a collaborative effort with the Winnebago County Literacy Council assist Winnebago County Refugees with pre-employment, employment, basic computer skills, ESL and citizenship activities.

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

**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.

**Job Placement Services for disabled and homeless** works with area employers and develops the support systems necessary for participants to obtain and maintain employment.



Achieving Educational Goals

**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.

## Employment & Training Impact

- 658** unemployed people enrolled in employment training programs
- 346** individuals obtained unsubsidized employment
- 160** Individuals obtained employment with benefits
- 147** individual's enrolled in occupational training received a certificate or diploma
- 43** individuals who participated in GED/HSED classes increased their academic skills by at least two grade levels
- 65** refugees enrolled in the ADVOCAP / Winnebago County Literacy Council's collaborative Road To Work Program and received pre-employment and ESL services

## 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. RSVP volunteers serve as tutors to our children and companions for older adults. They assist local food pantries and serve on construction teams to build homes for families in need.



RSVP Volunteer Delivering Mobile Meals

**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.

**Foster Grandparent Program** enriches the lives of children in schools, day cares 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 senior volunteers 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.

## Volunteer Services Impact

- 442** RSVP volunteers provided 51,509 hours of assistance to **84** non-profit organizations.
- 54** income eligible Foster Grandparent volunteers received a small stipend to provide **35,945** 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.
- 85** individuals received transportation assistance through the Winnebago County Transportation Program.
- 14** older adults living independently received weekly visits from an RSVP volunteer



## BUSINESS DEVELOPMENT

Low income entrepreneurs do not have the financial resources to realize their dream of starting a 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 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.



Produce with a Purpose Fond du Lac Business Micro-loan recipient

### Business Development Impact

- 139** individuals received business development assistance
- 37** new businesses started / expanded
- 51** new jobs created or sustained
- 32** people received car loans
- 18** people received repair assistance
- 39,484** work rides provided by participants



*"I just wanted to say how much I appreciate all of your help! I went from a situation going through a divorce where abruptly I had no vehicle to take my three children to school or daycare or myself to work. I found out about the Work N Wheels program and right away was treated with so much respect. I got a vehicle*

*that I like a lot and my kids would all fit comfortably. I don't know what I would have done without this program to help me and my kids get everywhere we need to go. I will forever be grateful to ADVOCAP and the Work N Wheels program. Thank you." - Ashley*

## 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.

**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.

**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.

**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.

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

**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

- 438** children and their families received comprehensive development services
- 53** fathers attended activities with their children
- 28,865** nutritious meals and snacks were provided to children
- 438** children received physical and dental exams
- 1,104** home visits conducted with families by teachers and family development specialists



Celebrating 50 Years

# 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.

*"The program has allowed me to stay in my apartment and get better in many health aspects."*

**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.



Participant at Congregate Meal Site enjoying a nutritious lunch

### Food & Nutrition Impact

- 1,191** elderly and disable adults were served nutritious meals
- 51,891** meals were served at congregate meal sites
- 49,503** home delivered meals served
- 372** homebound persons received daily safety checks
- 98** households raised fresh produce through community gardens
- 2.32** million lbs. of donated and federal commodity food distributed through area food pantries and feeding programs

## FINANCIAL REPORT

### Assets

Cash & Equivalents	\$	547,527
Accounts Receivable		2,419
Receivable from Funding Agencies		1,114,344
Material and Work in Progress Inventories		391,707
Prepaid Expenses		52,177
Investment in Subsidiaries		11,303
Land, Building and Equipment (net)		3,047,840
Micro Loans to Small Business	443,721	
Homeowner Loans (net)	5,394,750	
Auto Loans	263,062	
Total Loans Receivables		6,101,533
<b>Total Assets</b>	<b>\$</b>	<b>11,268,850</b>

### Liabilities & Net Assets

#### Liabilities

Program Advances	\$	531,452
Accounts Payable		159,706
Accrued Payroll and Other Expenses		395,535
Mortgages Payable		1,846,810
Deferred Revenue		41,409
<b>Total Liabilities</b>	<b>\$</b>	<b>2,974,912</b>

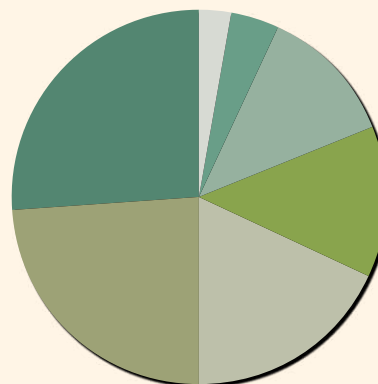
#### Net Assets

Temporarily Restricted	\$	7,639,977
Unrestricted		653,961
<b>Total Net Assets</b>		<b>8,293,938</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$</b>	<b>11,268,850</b>

### Revenues & Resources

Government Awards	\$	11,420,536
Program Revenue		241,149
Other Services		483,205
Corporate Funds		62,767
Investment Return		22,294
Contributions		533,328
Commodities		472,974
In Kind Donations		33,313
Gain (loss) on disposal of fixed assets		(90,217)
<b>Total Revenues</b>	<b>\$</b>	<b>13,179,349</b>

### 2014 Funding



- 3% Business Development Services\*
- 4% Volunteer Services
- 12% Food & Nutrition
- 18% Employment & Training
- 13% Affordable Housing\*
- 24% Head Start
- 26% 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 2014.



## Investors & Donors

Alliant Energy Foundation  
 American Association of University Women  
 Anonymous  
 Appleton CROP Hunger Walk  
 Berlin Area School District  
 BCI Burke Co.  
 Michael Bonertz  
 Charity Club, Inc.  
 Charity Committee  
 City of Appleton  
 City of Fond du Lac  
 City of Neenah  
 City of Oshkosh  
 Citizens First Bank  
 Mike Cuttill  
 The Family Radio Station  
 Farmers & Merchants Bank  
 Federal Emergency Management Agency (FEMA)  
 Jon W. Fleming  
 Fond du Lac Area Foundation  
 Fond du Lac County  
 Fond du Lac County Dept. of Community Programs  
 Fond du Lac County Dress Down Days  
 Fond du Lac Morning Rotary Foundation  
 Fond du Lac School District  
 Fox Valley Workforce Development Board, Inc.  
 Green Lake Community Foundation  
 Green Lake County  
 Green Lake County/Ripon Community Foundation  
 Green Lake Rotary Club  
 Mary Hill  
 IRIS Financial Services Agency  
 J.J. Keller Foundation, Inc.  
 Kiwanis Club of Fond du Lac Foundation Fund, Inc.  
 Eugene and Natalie Lambert  
 Marion Manor  
 Tanya Marcoe

Jack Meyers  
 Michels Family Foundation  
 Mid-States Aluminum Foundation  
 Richard Mohr  
 North Fond du Lac School District  
 Oberreich Foundation  
 Oshkosh Area Community Foundation  
 Oshkosh Area Community Food Pantry  
 Our Saviour's United Church of Christ  
 Douglas and Sharon Pearson  
 Betty Pernu  
 Razoo Foundation  
 Ripon Area School District  
 Ripon Area United Way  
 Ripon Kiwanis Club Foundation  
 Sadoff Family Foundation  
 SEEK Careers/Staffing, Inc.  
 Service League of Fond du Lac, Inc.  
 SIGMA  
 Sisters of St. Agnes  
 Soroptimist International of Fond du Lac  
 Southwestern Wisconsin Community Action Program, Inc.  
 St. Vincent DePaul  
 Stone Foundation, Inc.  
 Kathleen Travanty  
 U.S. Corporation For National Service  
 U.S. Dept. of Agriculture  
 U.S. Dept. of Education  
 U.S. Dept. of Health and Human Services  
 U.S. Dept. of Housing and Urban Development  
 U.S. Small Business Administration  
 United Way, Fond du Lac Area  
 United Way, Fox Cities  
 United Way, Oshkosh  
 Wally's Pick-A-Part  
 Winnebago County  
 WISCAP  
 Wisconsin Dept. of Administration  
 Wisconsin Dept. of Children & Families  
 Wisconsin Dept. of Health Services  
 Wisconsin Dept. of Public Instruction  
 Wisconsin Dept. of Transportation  
 Wisconsin Dept. of Workforce Development  
 Wisconsin Energy Conservation Corporation

## 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.