



For a Brighter Future.

Strategic Plan

2019

Steve Hoffman, President/CEO

Approved by Board: January 17, 2019

Introduction

The following pages outline Brightpoint's strategic plan for the next three years, through the end of 2021. Our central philosophy in the plan is to be both comprehensive and ambitious. We want our plan to include not only all of the things that we hope to do new or better in the coming years, but also all the major services that the organization delivers. As such, the reader will find reference to the major programs that Brightpoint already delivers. We also feel that accomplishing the majority of an ambitious plan will get us farther than completing all of a conservative plan. We do not presume that we will achieve all that is here, but we will strive for that and the organization will be much improved as a result.

The plan is organized around a set of long-range goals, objectives for each goal, and major action steps for each objective, all of which has been developed through a strategic planning process involving and approved by the Brightpoint board of directors. The plan highlights major actions to achieve, as well as major output targets, but does not include major outcome goals for the clients we serve. While outcomes are ultimately what we are here to achieve, those goals can be found in the various individual plans of our programs.

Throughout the plan the reader will find references to other documents, such as our program plans. These are more detailed plans that for the sake of size, do not need to be copied here. However, those can be thought of as "attachments" to the strategic plan and are very much a part of the overall strategic direction of the organization. These will be included with the strategic plan where appropriate, or are available on request for more information.

Lastly, we wanted to make note of the names that are identified throughout the document, as either champions, members of teams, or persons responsible. These names are by no means meant to indicate that these are the only people involved with various actions or will do all the work. Board members, staff from all over the organization, and volunteers will be helping in this effort. Identifying names is simply an effort to assign accountability for the progress of the various goals and objectives. Put another way, these are the identified key leaders and facilitators of the goals, objectives, and steps, but may not be the only ones and certainly not the only ones helping to achieve them.

We are excited to present our 2019-2021 strategic plan, and look forward to making Brightpoint a better organization and to better serving our clients and communities.

Brightpoint Board of Directors

Vision

Brightpoint envisions a world without poverty in which all people have access to opportunities and are treated with dignity.

Mission

Brightpoint's mission is to help communities, families, and individuals remove the causes and conditions of poverty.

Values

- 1) Demonstrate extreme commitment to our mission and provide accountable results;
- 2) Treat all people with dignity and provide excellent customer service;
- 3) Be servant leaders and act courageously;
- 4) Collaborate with clients, partners, funders, stakeholders, and each other to achieve our mission;
- 5) Act with integrity, consistency, and openness in everything we do.

Long-Range Goals

- 1) Provide quality services for low-income families that will provide them with the opportunities they need to achieve self-sufficiency.
- 2) Provide services that allow children to develop to their potential so they can grow into self-sufficient adults.
- 3) Increase the provision of services that build assets for families and improve the community conditions in which they live.
- 4) Enhance Brightpoint's operational excellence by increasing our capacity to achieve results.
- 5) Increase public awareness of poverty, advocate for low-income families, and develop new revenue sources through a comprehensive development program.

Strategic Goals and Objectives 2019-2021

- 1) Provide quality services for low-income families that will provide them with the opportunities they need to achieve self-sufficiency.
 - a) Provide and expand Family Development case management services.
 - b) Provide housing assistance via the Housing Choice Voucher Program (HCVP), Permanent Supportive Housing (PSH), Emergency Solutions Grant (ESG), and Supportive Services for Veteran Families (SSVF).
 - c) Provide utility assistance via the Energy Assistance Program (EAP) and add programming to help fill the gaps of service need in this area.
 - d) Expand ways to provide food assistance to families through partnerships, provision of services, and elimination of food deserts.
 - e) Provide child care assistance via the Child Care Voucher Program (CCDF) and On-My-Way Pre-K, and increase capacity to shorten waiting list time for clients in these programs.
 - f) Provide health care assistance via the Covering Kids and Families program.
 - g) Develop new services that help families meet their transportation needs.
 - h) Support the expansion of the Lasting Stability and Success for Individuals (LSSI Works) program.
 - i) Increase access to educational and training resources for adults through linkages and advocacy.
 - j) Expand services that enhance the life skills of the people Brightpoint serves.
- 2) Provide services that allow children to develop to their potential so they can grow into self-sufficient adults.
 - a) Provide and expand Early Head Start (EHS) services to children ages 0-2.
 - b) Provide and expand Head Start (HS) services to children ages 3-5.
 - c) Explore ways to reach middle school and early high school children and initiate their thinking about adulthood.
 - d) Provide and maintain the Jobs for America's Graduates (JAG) program for juniors and seniors in high school.
 - e) Enhance JAG services by providing financial literacy and other life skills training and career exploration.
 - f) Develop services that promote healthy families.

- 3) Increase the provision of services that build assets for families and improve the community conditions in which they live.
 - a) Increase consumer lending to \$2 million per year.
 - b) Increase small business lending to \$500,000 per year.
 - c) Expand automobile loan program to \$250,000 per year.
 - d) Establish the Enterprise Pointe live/work project in Angola.
 - e) Develop 137 units of affordable housing.
 - f) Provide and expand the Weatherization (WX) program.
 - g) Rehabilitate 12 owner-occupied homes within a community outside of Fort Wayne.
 - h) Provide and expand housing counseling services.
 - i) Maintain and expand services that help families manage and increase their financial resources.
- 4) Enhance Brightpoint's operational excellence by increasing our capacity to achieve results.
 - a) Ensure accountability, compliance, and transparency via fiscal/legal/program monitoring and maintaining certifications/accreditations.
 - b) Increase our organizational presence in our rural communities and South Bend.
 - c) Enhance customer service at all levels and departments of the organization.
 - d) Expand staff capacity within the organization.
 - e) Grow our financial reserve to \$1.4 million.
 - f) Enhance the culture and environment of the organization through implementation of values, improved communication, and increased morale.
 - g) Increase and enhance partnerships that support goals 1, 2, and 3.
 - h) Increase utilization of technology accelerators that enhance service delivery and increase capacity to achieve results.
- 5) Increase public awareness and advocacy of both poverty and Brightpoint, and develop new revenue sources through a comprehensive development program.
 - a) Raise awareness of poverty and the issues that low-income families face, as well as the assets that low-income families have.

- b) Increase recognition of Brightpoint and its mission through public relations and education.
- c) Increase Brightpoint's annual fundraising campaign to \$350,000 annually.
- d) Diversify Brightpoint's financial resources by expanding existing sources and accessing new ones.
- e) Enhance our public advocacy capacity at the local, state, and national levels.

Objectives for
Long Range Goal #1

Goal 1: Provide quality services for low-income families that will provide them with the opportunities they need to achieve self-sufficiency.

Objective 1a: Provide and expand Family Development case management services.

Champion: Pam Brookshire

Others on team: Steve Hoffman, John Robb, Melissa McClure

| Step | Action | Person Responsible | Target Date | Status |
|------|---|---------------------|-------------|--------|
| 1 | <i>Provide Family Development to 200 families by 12/31/19</i> | Robb | 12/19 | |
| 2 | See program plan | | | |
| 3 | <i>Provide Outcomes Financial Assistance (OFA) to 100 families by 12/31/19</i> | Robb | 12/19 | |
| 4 | See program plan | | | |
| 5 | <i>Provide Bounce Back financial assistance to 30 families by 12/31/19</i> | Robb | 12/19 | |
| 6 | <i>Increase the capacity to serve clients in Family Development from 4 case managers to 6.</i> | | | |
| 7 | Increase utilization of Bounce Back case management to 1 FTE. | Robb | 12/19 | |
| 8 | Engage with INCAA process to establish statewide system of Family Development, which will lead to statewide funding models. | Hoffman, Brookshire | 12/21 | |
| 9 | Advocate for state funding set aside for Family Development | Hoffman | 12/21 | |
| 10 | Advocate for more funding through utilities, such as the Universal Service Fund | Brookshire | 12/20 | |
| 11 | Develop ways of funding Family Development through accessing non-traditional funding or building the model into programs | Hoffman, Brookshire | 12/21 | |
| 12 | <i>Enhance Family Development by integrating with the “Broker Collaborative”</i> | Hoffman | 12/20 | |
| 13 | Complete Foellinger Breakthrough planning process and apply for Phase II funding | Hoffman, Brookshire | 06/19 | |
| 14 | Secure Phase II funding | Hoffman | 10/19 | |
| 15 | Establish system policies and procedures | Hoffman | 06/19 | |

| Step | Action | Person Responsible | Target Date | Status |
|------|---|------------------------|-------------|--------|
| 16 | Implement service delivery protocols | Hoffman | 10/19 | |
| 17 | Launch pilot | Brookshire | 12/19 | |
| 18 | Serve 20 clients within the pilot | Brookshire | 12/20 | |
| 19 | <i>Enhance Family Development services by updating case management curriculum.</i> | Brookshire | | |
| 20 | Analyze and enhance financial literacy/budgeting component | Robb | 12/19 | |
| 21 | Analyze and enhance job search component | Robb | 12/19 | |
| 22 | Establish life skills component | Brookshire | 12/20 | |
| 23 | Establish education/training protocols | Brookshire | 12/20 | |
| 24 | <i>Increase OFA funding pool by 50%, to \$240,000 annually.</i> | Hoffman, Brookshire | 12/21 | |
| 25 | Maintain funding from United Way | Hoffman | 06/19 | |
| 26 | Increase funding from United Way by \$20,000 | Hoffman | 06/19 | |
| 27 | Maintain funding from Bounce Back | Hoffman | 12/19 | |
| 28 | Increase funding from Bounce Back by \$20,000 | Hoffman | 12/20 | |
| 29 | Apply for funding from each county's community foundation | McClure | 12/21 | |
| 30 | As the opportunity arises, set aside flexible financial assistance in existing programs | Brookshire | 12/21 | |
| 31 | Seek funding from new sources that are not traditional to Brightpoint | Brookshire | 12/21 | |

Goal 1: Provide quality services for low-income families that will provide them with the opportunities they need to achieve self-sufficiency.

Objective 1b: Provide housing assistance via the Housing Choice Voucher Program (HCVP), Permanent Supportive Housing (PSH), Emergency Solutions Grant (ESG), and Supportive Services for Veteran Families (SSVF).

Champion: Pam Brookshire

Others on team: John Robb, Melissa McClure, Matt Beer

| Step | Action | Person Responsible | Target Date | Status |
|-------------|---|---------------------------|--------------------|---------------|
| 1 | <i>Provide HCVP to 160 families by 12/31/19</i> | Beer | 12/19 | |
| 2 | See program plan | | | |
| 3 | <i>Provide PSH to 40 families by 09/30/19</i> | Beer | 09/19 | |
| 4 | See program plan | | | |
| 5 | <i>Provide ESG to 40 families by 12/31/19</i> | Robb | 12/19 | |
| 6 | See program plan | | | |
| 7 | <i>Provide SSVF to 95 families by 09/30/19</i> | Robb | 09/19 | |
| 8 | See program plan | | | |

Goal 1: Provide quality services for low-income families that will provide them with the opportunities they need to achieve self-sufficiency.

Objective 1c: Provide utility assistance via the Energy Assistance Program (EAP) and add programming to help fill the gaps of service need in this area.

Champion: Pam Brookshire

Others on team: Lesa Cassel, Gina Kostoff

| Step | Action | Person Responsible | Target Date | Status |
|-------------|---|---------------------------|--------------------|---------------|
| 1 | <i>Provide Energy Assistance to 9,000 families by 9/30/19</i> | Cassel | 9/19 | |
| 2 | See program plan | | | |
| 3 | <i>Increase funding for utility deposits, disconnect fees, clients above EAP guidelines</i> | | | |
| 4 | Cultivate funding from NIPSCO | Brookshire | 09/21 | |
| 5 | Cultivate funding from AEP | Brookshire, Kostoff | 09/20 | |
| 6 | Assist INCAA with statewide funding efforts | Brookshire | 12/21 | |
| 7 | <i>Develop furnace repair and replacement program</i> | | | |
| 8 | Design program | Cassel | 01/19 | |
| 9 | Hire staff | Cassel | 01/19 | |
| 10 | Fully implement program | Cassel | 05/19 | |

Goal 1: Provide quality services for low-income families that will provide them with the opportunities they need to achieve self-sufficiency.

Objective 1d: Expand ways to provide food assistance to families through partnerships, provision of services, and elimination of food deserts.

Champion: Steve Hoffman

Others on team: Mary Lee Freeze, Theresa Dorais, Sherry Early-Aden, Pam Brookshire, Andrew Applegate

| Step | Action | Person Responsible | Target Date | Status |
|------|--|--------------------|-------------|--------|
| 1 | <i>Provide Community Cupboard referrals to 500 families by 12/31/21</i> | Brookshire | 12/21 | |
| 2 | Audit current usage levels | Applegate | 02/19 | |
| 3 | Determine usage capacity | Brookshire | 04/19 | |
| 4 | Implement system of usage within agency programs | Applegate | 06/19 | |
| 5 | Develop tracking system | Applegate | 06/19 | |
| 6 | <i>Provide 115,000 meals through the CACFP program in Head Start by 10/31/19</i> | Dorais | 10/19 | |
| 7 | <i>Expand Thankful Thursday food backpack program from 1 Head Start site to 4</i> | Freeze | 10/20 | |
| 8 | <i>Establish a grocery store within a food desert in Fort Wayne</i> | Aden | 12/21 | |
| 9 | Develop business plan | Aden, Hoffman | 06/19 | |
| 10 | Explore possible funding options | Aden, Hoffman | 08/19 | |
| 11 | Explore possible site locations | Aden, Hoffman | 12/19 | |
| 12 | Complete feasibility study | Aden | 04/20 | |
| 13 | Secure funding | Hoffman | 10/20 | |
| 14 | Secure site location and begin development | Aden, Hoffman | 10/20 | |
| 15 | Launch | Aden, Hoffman | 12/21 | |
| 16 | <i>Conduct 8 Healing Kitchen classes annually</i> | Aden | 12/19 | |

Goal 1: Provide quality services for low-income families that will provide them with the opportunities they need to achieve self-sufficiency.

Objective 1e: Provide and expand child care assistance via the Child Care Voucher Program (CCDF) and On-My-Way Pre-K, and increase capacity to shorten waiting list time for clients in those programs.

Champion: Pam Brookshire

Others on team: Steve Hoffman, Lesa Cassel, Andrea Young, Kira McKinley

| Step | Action | Person Responsible | Target Date | Status |
|-------------|--|---------------------------|--------------------|---------------|
| 1 | <i>Provide CCDF to 8080 children by 06/30/19</i> | Cassel | 06/19 | |
| 2 | See program plan | | | |
| 3 | Secure seven new counties within our service area for CCDF program | Brookshire | 02/19 | |
| 4 | Implement program in new counties | Cassel | 06/19 | |
| 5 | <i>Provide On-My-Way Pre-K to 400 children by 08/30/19</i> | Cassel | 08/19 | |
| 6 | See program plan | | | |
| 7 | Advocate to remove service need from OMW-PreK | Hoffman | 05/21 | |
| 8 | Advocate to increase income guideline for OMW-PreK to 200% and below of poverty. | Hoffman | 05/21 | |
| 9 | <i>Increase the capacity to serve clients on the child care waiting lists from \$80,000 to \$160,000</i> | Hoffman | 12/21 | |
| 10 | Secure United Way allocations funding of \$100,000 | Hoffman | 06/19 | |
| 11 | Secure Foellinger Breakthrough Phase II funding and utilize \$20,000 toward child care vouchers | Hoffman | 06/19 | |
| 12 | Cultivate funding from United Way of St. Joseph County | Hoffman | 12/20 | |
| 13 | Determine ways to expand the pool via flexible dollars in existing programs | Brookshire | 12/20 | |
| 14 | Secure donations/grants that add to our pool | Brookshire | 12/21 | |

Goal 1: Provide quality services for low-income families that will provide them with the opportunities they need to achieve self-sufficiency.

Objective 1f: Provide health care assistance via the Covering Kids and Families (CKF) program.

Champion: Pam Brookshire

Others on team: Amanda Chappell

| Step | Action | Person Responsible | Target Date | Status |
|-------------|---|---------------------------|--------------------|---------------|
| 1 | <i>Provide CKF to 2000 households by 12/31/19</i> | Chappell | 12/19 | |
| 2 | See program plan | | | |
| 3 | Increase staff capacity in Allen County by 1 FTE to better serve clients | Chappell | 12/19 | |
| 4 | Develop outreach plan for jails to increase access to offenders leaving incarceration | Chappell | 12/21 | |

Goal 1: Provide quality services for low-income families that will provide them with the opportunities they need to achieve self-sufficiency.

Objective 1g: Develop new services that help families meet their transportation needs

Champion: Steve Hoffman

Others on team: Sherry Early-Aden, Pam Brookshire, Mary Lee Freeze

| Step | Action | Person Responsible | Target Date | Status |
|------|---|---------------------|-------------|--------|
| 1 | <i>Expand automobile loan program to 50 loans</i> | Aden | 12/21 | |
| 2 | Secure CDFI funding to expand loan pool | Aden | 10/19 | |
| 3 | Explore other funding for loan pool, including EQ2 possibilities | Hoffman, Aden | 12/20 | |
| 4 | Expand access to auto loans to new client pools, including Head Start/Early Head Start, BP housing developments, Broker collaboration | Aden | 12/19 | |
| 5 | Establish ongoing loan underwriting and servicing processes | Aden | 12/19 | |
| 6 | <i>Complete white paper on transportation needs and service models</i> | Aden | 06/19 | |
| 7 | <i>Increase use of OFA for transportation needs</i> | Brookshire | 12/19 | |
| 8 | Determine parameters for fuel assistance, auto repair, etc. | Hoffman, Brookshire | 03/19 | |
| 9 | Integrate OFA transportation assistance into Family Development and Head Start/EHS | Hoffman | 06/19 | |
| 10 | Integrate OFA transportation assistance into Broker collaboration | Hoffman | 06/19 | |
| 11 | <i>Establish transportation services at Slocum Pointe</i> | | | |
| 12 | Conduct negotiations with Community Transportation Network for routes to Turnstone and other basic needs locations | Hoffman | 12/19 | |
| 12 | Secure funding | Hoffman | 12/19 | |
| 13 | Launch services | Hoffman | 06/20 | |
| 14 | <i>Explore establishing a Uber or Lyft model for low-income individuals</i> | Hoffman | 12/21 | |
| 15 | Test services in EHS and FD | Freeze, Brookshire | 12/19 | |

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|----|---|---------|-------|--|
| 16 | Explore feasibility of including service via Brightpoint and OFA. | Hoffman | 02/20 | |
| 17 | Develop Uber or Lyft model within Broker collaboration | Hoffman | 06/20 | |
| 18 | Secure additional funding for service | Hoffman | 12/21 | |

Goal 1: Provide quality services for low-income families that will provide them with the opportunities they need to achieve self-sufficiency.

Objective 1h: Support the expansion of the Lasting Stability and Success for Individuals (LSSI Works) employment program.

Champion: Steve Hoffman

Others on team: Pam Brookshire, John Robb, Melissa McClure

| Step | Action | Person Responsible | Target Date | Status |
|-------------|--|---------------------------|--------------------|---------------|
| 1 | <i>Integrate Brightpoint services into LSSI's Lasting Stability and Success for Individuals program.</i> | Robb | 12/19 | |
| 2 | Develop referral system into program | Robb | 06/19 | |
| 3 | Integrate Family Development case management services alongside LSSI Works services | Robb | 12/19 | |
| 4 | Secure supportive services linkages (OFA, child care, CKF) to program | Brookshire | 12/19 | |
| 5 | Support the integration of the LSSI Works program into the Broker collaboration | Hoffman | 06/20 | |
| 6 | Expand usage of LSSI Works throughout other Brightpoint programs | Hoffman | 12/20 | |

Goal 1: Provide quality services for low-income families that will provide them with the opportunities they need to achieve self-sufficiency.

Objective 1i: Increase access to educational resources for adults through linkages and advocacy.

Champion: Steve Hoffman

Others on team: Sherry Early-Aden, Pam Brookshire, Mary Lee Freeze

| Step | Action | Person Responsible | Target Date | Status |
|------|--|--------------------|-------------|--------|
| 1 | <i>Develop partnerships with Ivy Tech, IPFW, and Indiana Tech</i> | Hoffman | 12/20 | |
| 2 | Determine what we would like to seek in a partnership | Hoffman | 06/19 | |
| 3 | Negotiate with schools to create linkages between Brightpoint services and the schools | Hoffman | 12/20 | |
| 4 | <i>Advocate with schools to remove pre-requisites for courses that would be beneficial to our clients</i> | Hoffman | 12/21 | |
| 5 | <i>Explore ways to remove barriers to post-secondary education access for clients</i> | Hoffman | 12/21 | |
| 6 | <i>Establish partnership with trade unions to provide access to training for clients</i> | Hoffman | 12/21 | |
| 7 | Explore possibilities with labor union contacts | Hoffman | 12/20 | |
| 8 | Determine first trade to be established based on feasibility and potential | Hoffman | 04/21 | |
| 9 | Establish MOU with appropriate trade union | Hoffman | 06/21 | |
| 10 | Connect first client | Brookshire | 12/21 | |

Goal 1: Provide quality services for low-income families that will provide them with the opportunities they need to achieve self-sufficiency.

Objective 1j: Expand services that enhance the life skills of the people Brightpoint serves.

Champion: Sherry Early-Aden

Others on team: Steve Hoffman, Pam Brookshire, Scott Kinsey, John Robb

| Step | Action | Person Responsible | Target Date | Status |
|------|--|--------------------|-------------|--------|
| 1 | <i>Integrate Brightpoint services into LSSI's Lasting Stability and Success for Individuals program.</i> | Robb | 12/19 | |
| 2 | See objective 1h | | | |
| 3 | Conduct 8 Healing Kitchen classes annually | Aden | 12/19 | |
| 4 | Develop Life Skills Training Program | Brookshire | 12/20 | |
| 5 | Create program design | Brookshire | 06/19 | |
| 6 | Determine funding needs and secure funding | Hoffman | 12/19 | |
| 7 | Create job description | Brookshire | 12/19 | |
| 8 | Hire program coordinator | Brookshire | 03/20 | |
| 9 | Develop training calendar | Brookshire | 09/20 | |
| 10 | Conduct first training | Brookshire | 12/20 | |
| 11 | Provide Financial Literacy training to 200 adults via workshops by 12/31/21 | Aden | 12/19 | |
| 12 | Provide Financial Literacy training to 100 adults via Family Development by 12/31/19 | Aden | 12/19 | |
| 13 | Provide Financial Literacy training to 200 youth via the JAG program by 06/30/20 | Bryant | 06/20 | |
| 14 | Secure United Way funding for JAG Resource Coordinator | Hoffman | 06/19 | |
| 15 | Hire Resource Coordinator | Bryant | 08/19 | |
| 16 | Provide training to youth | Bryant | 06/20 | |
| 17 | Provide home maintenance training to 30 clients by 12/31/20 | | | |
| 18 | Determine curriculum | Aden | 12/19 | |

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|----|--|-----------|-------|--|
| 19 | Determine trainer | Aden | 06/20 | |
| 20 | Provide training | Aden | 12/20 | |
| 21 | Conduct survey/needs assessment to determine other life skills training needs | Applegate | 06/19 | |
| 22 | Include mental health, home ownership, auto ownership, job search, parenting, professional etiquette, time management (as well as identified topics of financial literacy, cooking/healthy eating, home maintenance) | | | |

Objectives for
Long Range Goal #2

Goal 2: Provide services that allow children to develop to their potential so they can grow into self-sufficient adults.

Objective 2a: Provide and expand Early Head Start (EHS) services to children ages 0-2.

Champion: Mary Lee Freeze

Others on team: Tammy Pifer, Lisa Kipker, Steve Hoffman

| Step | Action | Person Responsible | Target Date | Status |
|-------------|--|---------------------------|--------------------|---------------|
| 1 | <i>Provide EHS to 72 children by 10/31/19</i> | Pifer | 10/19 | |
| 2 | See program plan | | | |
| 3 | <i>Increase EHS slots by 18 slots</i> | Freeze | 12/21 | |
| 4 | Evaluate expansion funding opportunities within HHS | Freeze | 12/20 | |
| 5 | Design Early Head Start center-based model | Pifer | 06/19 | |
| 6 | Evaluate potential locations and facility costs | Kipker | 12/19 | |
| 7 | Secure expansion funding from HHS | Freeze | 12/21 | |
| 8 | Explore alternative funding options for center-based model | Pifer | 12/21 | |

Goal 2: Provide services that allow children to develop to their potential so they can grow into self-sufficient adults.

Objective 2b: Provide and expand Head Start (HS) services to children ages 3-5.

Champion: Mary Lee Freeze

Others on team: Lisa Kipker, Pam Mason, Deanna Backman, Theresa Dorais, Steve Hoffman

| Step | Action | Person Responsible | Target Date | Status |
|-------------|--|---------------------------|--------------------|---------------|
| 1 | <i>Provide HS to 585 children by 10/31/19</i> | Freeze | 10/19 | |
| 2 | See program plan | | | |
| 3 | <i>Increase 20% of HS slots from part-day to full-day</i> | Freeze | 10/21 | |
| 4 | Evaluate expansion funding opportunities within HHS | Freeze | 12/20 | |
| 5 | Evaluate potential locations and facility costs | Kipker | 12/20 | |
| 6 | Secure expansion funding from HHS | Freeze | 12/21 | |
| 7 | Explore alternative funding options for center-based model | Freeze | 12/21 | |

Goal 2: Provide services that allow children to develop to their potential so they can grow into self-sufficient adults.

Objective 2c: Explore ways to reach middle school and early high school children and initiate their thinking about adulthood.

Champion: Mary Lee Freeze

Others on team: Pam Mason, Lisa Kipker, Steve Hoffman

| Step | Action | Person Responsible | Target Date | Status |
|-------------|---|---------------------------|--------------------|---------------|
| 1 | Research programming to middle school kids throughout community | Kipker | 12/19 | |
| 2 | Analyze programs, as well as organizational capacity | Hoffman, Freeze | 04/20 | |
| 3 | Determine any partnership opportunities | Hoffman, Freeze | 07/20 | |
| 4 | Explore funding options | Hoffman, Freeze | 07/20 | |
| 5 | Develop program plan or partnership plan based on findings | Freeze | 12/20 | |

Goal 2: Provide services that allow children to develop to their potential so they can grow into self-sufficient adults.

Objective 2d: Provide and maintain the Jobs for America’s Graduates (JAG) program for juniors and seniors in High School.

Champion: Pam Brookshire

Others on team: Rachel Bryant, Steve Hoffman

| Step | Action | Person Responsible | Target Date | Status |
|------|---|---------------------|-------------|--------|
| 1 | <i>Provide JAG to 560 youth by 5/31/19</i> | Bryant | 05/19 | |
| 2 | See program plan | | | |
| 3 | Advocate for ways to limit or eliminate funding cuts to program | Hoffman, Brookshire | 05/21 | |
| 4 | Advocate for program at state level | Hoffman | 05/21 | |
| 5 | Explore alternative funding sources | Brookshire, Bryant | 05/21 | |
| 6 | Acquire replacement funding for any funding losses | Brookshire, Bryant | 05/21 | |

Goal 2: Provide services that allow children to develop to their potential so they can grow into self-sufficient adults.

Goal 2e: Enhance JAG services by providing increased financial literacy, life skills training, and career exploration.

Champion: Rachel Bryant

Others on team: Pam Brookshire, Steve Hoffman

| Step | Action | Person Responsible | Target Date | Status |
|------|--|--------------------|-------------|--------|
| 1 | Secure United Way funding for JAG Resource Coordinator | Hoffman | 06/19 | |
| 2 | Hire Resource Coordinator | Bryant | 08/19 | |
| 3 | Provide training to youth | Bryant | 06/20 | |
| 4 | <i>Provide Financial Literacy training to 200 youth via the JAG program by 06/30/20</i> | Bryant | 06/20 | |
| 5 | Determine life skills enhancements that can be provided via resource coordinator | Bryant | 12/19 | |
| 6 | Secure needed volunteers or subcontractors to provide training | Bryant | 03/20 | |
| 7 | Establish calendar and implement | Bryant | 06/20 | |
| 8 | Determine career exploration enhancements that can be provided via resource coordinator | Bryant | 12/19 | |
| 9 | Secure needed volunteers or subcontractors to provide training | Bryant | 03/20 | |
| 10 | Establish calendar and implement | Bryant | 06/20 | |

Goal 2: Provide services that allow children to develop to their potential so they can grow into self-sufficient adults.

Goal 2f: Develop services that promotes healthy families.

Champion: Steve Hoffman

Others on team: Pam Brookshire, Mary Lee Freeze, Sherry Early-Aden, Pam Mason, Rachel Bryant

| Step | Action | Person Responsible | Target Date | Status |
|------|--|---------------------|-------------|--------|
| 1 | <i>Develop Fatherhood Initiative within Head Start and Early Head Start</i> | Freeze | 19/19 | |
| 2 | Evaluate last initiative | Freeze, Mason | 04/19 | |
| 3 | Complete new program plan | Freeze, Mason | 06/19 | |
| 4 | Secure United Way funding | Hoffman | 06/19 | |
| 5 | Launch initiative | Mason | 09/19 | |
| 6 | Evaluate initiative for replication in other agency programs | Hoffman | 05/20 | |
| 7 | <i>Develop anti-teen pregnancy curriculum within JAG</i> | Hoffman, Brookshire | 07/20 | |
| 8 | Develop white paper on curriculums | Applegate | 09/19 | |
| 9 | Design curriculum | Brookshire, Bryant | 12/19 | |
| 10 | Explore partnership opportunities | Brookshire, Bryant | 03/20 | |
| | Secure necessary funding | Brookshire | 06/20 | |
| 11 | Launch curriculum | Bryant | 07/20 | |
| 12 | Evaluate curriculum for replication for non-youth | Hoffman | 06/21 | |
| 13 | <i>Develop healthy relationships curriculum within client education program</i> | Brookshire | 12/20 | |
| 14 | Develop white paper on curriculums | Applegate | 09/19 | |
| 15 | Design curriculum | Brookshire | 12/19 | |
| 16 | Explore partnership opportunities | Brookshire | 03/20 | |
| 17 | Secure necessary funding | Brookshire | 06/20 | |
| 18 | Launch curriculum | Brookshire | 12/20 | |

| | | | | |
|----|--|--------------------|-------|--|
| 19 | Develop self-esteem and healthy relationships curriculum within JAG | Brookshire | 07/20 | |
| 20 | Develop white paper on curriculums | Applegate | 09/19 | |
| 21 | Design curriculum | Brookshire, Bryant | 12/19 | |
| 22 | Explore partnership opportunities | Brookshire, Bryant | 03/20 | |
| 23 | Secure necessary funding | Brookshire | 06/20 | |
| 24 | Launch curriculum | Bryant | 07/20 | |
| 25 | Evaluate curriculum for replication for non-youth | Hoffman | 06/21 | |
| 26 | Develop texting program to send out tips, reminders, alerts, etc. on healthy families topics | Renner | 09/19 | |
| 27 | Evaluate and develop technology needs | Renner | 06/19 | |
| 28 | Build initial content databank | Renner | 09/19 | |
| 29 | Launch program | Renner | 09/19 | |
| 30 | Build recipient list to 500 | Renner | 12/21 | |
| 31 | Explore ways to engage extended families in the lives of children | Freeze | | |
| 32 | Research existing programs/activities | Mason | 06/20 | |
| 33 | Develop plan for within Head Start and Early Head Start | Mason | 08/20 | |
| 34 | Launch plan | Mason | 09/20 | |
| 35 | Evaluate for replication to other areas of organization | Hoffman | 09/21 | |
| 36 | Explore ways to support an increase in child support payment rates among clients and the community at large | Hoffman | 12/21 | |
| 37 | Include research on child support within our community assessment | Applegate | 06/19 | |
| 38 | Engage in community conversations, including with the Alliance for Human Services, to determine any viable advocacy efforts & linkages | Hoffman | 12/19 | |
| 39 | Establish linkages as feasible to improve payment rates for Brightpoint clients | Hoffman | 12/20 | |
| 40 | Integrate protocols into Brightpoint programming to assist clients with securing child support | Hoffman | 12/21 | |

Objectives for
Long Range Goal #3

Goal 3: Increase the provision of services that build assets for families and improve the community conditions in which they live.

Goal 3a: Increase consumer lending to \$2 million per year.

| Step | Action | Person Responsible | Target Date | Status |
|-------------|--|---------------------------|--------------------|---------------|
| 1 | Hire BDF Manager to increase staff capacity | Aden | 03/19 | |
| 2 | Maintain current employers on program | Hoffman | 12/19 | |
| 3 | Secure employer leads from board | Hoffman | 03/19 | |
| 4 | Develop detailed employer prospect list | Hoffman | 06/19 | |
| 5 | Develop action plan, including timeline, of employer recruitment | Aden | 07/19 | |
| 6 | Begin employer recruitment plan | Aden | 08/19 | |
| 7 | Secure \$50,000 in increased capacity funding | Hoffman | 12/20 | |
| 8 | Maintain \$1 million EQ2 funding for loan pool | Hoffman | 12/19 | |
| 9 | Secure \$2 million EQ2 funding for Loan pool | Hoffman | 12/20 | |
| 10 | Secure \$50,000 in loan loss reserve donations per year | Hoffman | 12/19 | |
| 11 | Secure 2,000 new employee base, \$1 million per year | Hoffman | 12/19 | |
| 12 | Secure 6,000 new employee base, \$1.4 million per year | Hoffman | 12/20 | |
| 13 | Secure 10,000 new employee base, \$2 million loan per year | Hoffman | 12/21 | |

Goal 3: Increase the provision of services that build assets for families and improve the community conditions in which they live.

Goal 3b: Increase small business lending to \$500,000 per year.

Champion: Sherry Early-Aden

Others on team: Steve Hoffman, Barb Cayce

| Step | Action | Person Responsible | Target Date | Status |
|------|---|--------------------|-------------|--------|
| 1 | Maintain SBA and CDFI capacity funding to ensure program self-sufficiency | Aden | 12/19 | |
| 2 | Maintain SBA loan funding of at least \$250,000 per year | Aden | 12/19 | |
| 3 | Increase CDFI loan funding to \$250,000 | Aden | 12/21 | |
| 4 | Secure other sources of loan funding | Aden, Hoffman | 12/21 | |
| 5 | Secure \$75,000 annually for loan-loss reserve | Aden, Hoffman | 12/21 | |
| 6 | Increase street outreach to secure 40 loans per year | | 12/19 | |
| 7 | Increase bank referrals to secure 25 loans per year | Aden, Hoffman | 12/19 | |
| 8 | Increase partner referrals to secure 6 loans per year | Aden | 12/21 | |
| 9 | Maintain post-loan TA to ensure success of client | | 12/19 | |
| 10 | Maintain post-loan monitoring to ensure low default rate | Cayce | 12/19 | |
| 12 | Develop targeted small business lending program for Southeast Fort Wayne | Aden, Hoffman | 12/20 | |

Goal 3: Increase the provision of services that build assets for families and improve the community conditions in which they live.

Goal 3c: Expand automobile lending to \$250,000 per year.

Champion: Steve Hoffman

Others on team: Sherry Aden

| Step | Action | Person Responsible | Target Date | Status |
|-------------|---|---------------------------|--------------------|---------------|
| 1 | Secure additional loan pool | Hoffman | 12/21 | |
| 2 | Expand product offering to Broker collaboration | Hoffman | 08/19 | |
| 3 | Expand product offering to Brightpoint housing developments | Aden | 06/19 | |
| 4 | Create plan and linkages to other Brightpoint programs. | Aden | 12/19 | |
| 5 | Test with selected CLC clients | Aden | 12/20 | |
| 6 | Create linkage to LSSI Works | Hoffman | 06/20 | |
| 7 | Maintain underwriting and servicing guidelines | Aden | 12/21 | |

Goal 3: Increase the provision of services that build assets for families and improve the community conditions in which they live.

Goal 3d: Establish the Enterprise Pointe live/work project in Angola

Champion: Steve Hoffman

Others on team: Dawn Gallaway

| Step | Action | Person Responsible | Target Date | Status |
|-------------|--|---------------------------|--------------------|---------------|
| 1 | Secure LIHTC funds from HCDA | Gallaway | 05/19 | |
| 2 | Secure construction/permanent loans | Hoffman | 07/19 | |
| 3 | Finalize tax credit sales with investors | Gallaway | 12/19 | |
| 4 | Secure additional funding if necessary | Hoffman | 12/19 | |
| 5 | Begin construction | Keller Development | 05/20 | |
| 6 | Lease up units | New Generation | 05/21 | |

Goal 3: Increase the provision of services that build assets for families and improve the community conditions in which they live.

Goal 3e: Develop 137 units of affordable units.

Champion: Steve Hoffman

Others on team: Sherry Early-Aden, Dawn Gallaway

| Step | Action | Person Responsible | Target Date | Status |
|------|---|--------------------|-------------|--------|
| 1 | Establish Enterprise Pointe (50 units) | Hoffman | 05/21 | |
| 2 | Secure LIHTC funds from HCDA | Gallaway | 05/19 | |
| 3 | Secure construction/permanent loans | Hoffman | 07/19 | |
| 4 | Finalize tax credit sales with investors | Gallaway | 12/19 | |
| 5 | Secure additional funding if necessary | Hoffman | 12/19 | |
| 6 | Begin construction | Keller Development | 05/20 | |
| 7 | Lease up units | New Generation | 05/21 | |
| 8 | Complete Slocum Pointe (43 units) | | | |
| 9 | Begin construction | Keller Development | 05/19 | |
| 10 | Lease up units | New Generation | 05/20 | |
| 11 | Develop housing units in conjunction with the New Allen Alliance (8 units) | | | |
| 12 | Determine project scope | Aden | 01/19 | |
| 13 | Locate site | Aden | 03/19 | |
| 14 | Develop pro forma | Aden | 05/19 | |
| 15 | Develop site plan | Aden | 06/19 | |
| 16 | Secure funding | Aden | 12/19 | |
| 17 | Finalize builder, GC, etc. | Aden | 12/19 | |
| 18 | Begin construction | Aden | 05/20 | |
| 19 | Lease up units | Aden | 05/21 | |
| 20 | Establish fifth housing project (36 units) | | | |
| 21 | Determine project scope | Hoffman | 12/20 | |

| | | | | |
|----|--|----------------|-------|--|
| 22 | Locate site | Hoffman | 03/21 | |
| 23 | Develop pro forma | Gallaway | 04/21 | |
| 24 | Develop site plan | Aden | 05/21 | |
| 25 | Develop tax credit funding application | Gallaway, Aden | 07/21 | |
| 26 | Secure funding | Gallaway, Aden | 12/21 | |

Goal 3: Increase the provision of services that build assets for families and improve the community conditions in which they live.

Goal 3f: Provide and expand the Weatherization (WX) program.

Champion: Pam Brookshire

Others on team: Joel Harms

| Step | Action | Person Responsible | Target Date | Status |
|-------------|--|---------------------------|--------------------|---------------|
| 1 | <i>Provide Weatherization to 120 households by 9/30/19</i> | Harms | 09/19 | |
| 2 | See program plan | | | |
| 3 | <i>Secure 33% additional WX funding via DOE and LIHEAP.</i> | | | |
| 4 | Meet current DOE and LIHEAP production goals | Harms | 09/19 | |
| 5 | Increase internal capacity of the WX department | Harms | 09/19 | |
| 6 | Cultivate increase in funding amounts | Brookshire | 03/20 | |
| 7 | <i>Develop business opportunities via Energy Savers Consultants</i> | | | |
| 8 | Increase internal capacity of the WX department | Harms | 09/20 | |
| 9 | Research business opportunities | Brookshire | 12/20 | |
| 10 | Secure business opportunities | Brookshire | 06/21 | |

Goal 3: Increase the provision of services that build assets for families and improve the community conditions in which they live.

Goal 3g: Rehabilitate 12 owner-occupied homes within a community outside of Fort Wayne.

Champion: Sherry Early-Aden

Others on team: Steve Hoffman, Pam Brookshire, Joel Harms, Pat Burke

| Step | Action | Person Responsible | Target Date | Status |
|-------------|---|---------------------------|--------------------|---------------|
| 1 | Finalize agreements with New Allen Alliance | Aden | 02/19 | |
| 2 | Negotiate with local community leaders | Aden | 02/19 | |
| 3 | Locate properties | Aden | 06/19 | |
| 4 | Complete funding application | Aden | 10/19 | |
| 5 | Secure funding | Aden | 12/19 | |
| 6 | Develop work scopes | Burke | 06/20 | |
| 7 | Complete rehab work | Burke | 03/21 | |

Goal 3: Increase the provision of services that build assets for families and improve the community conditions in which they live.

Goal 3h: Provide and expand housing counseling services

Champion: Sherry Early-Aden

Others on team: Matt Beer, John Robb

| Step | Action | Person Responsible | Target Date | Status |
|-------------|--|---------------------------|--------------------|---------------|
| 1 | <i>Provide housing counseling to 300 households</i> | Beer | 12/19 | |
| 2 | See program plan | | | |
| 3 | Increase contract with Housing Action Illinois to \$60,000 | Aden | 12/21 | |

Objectives for
Long Range Goal #4

Goal 4: Enhance Brightpoint’s operational excellence by increasing our capacity to achieve results.

Goal 4a: Ensure accountability, compliance, and transparency via fiscal/legal/program monitoring and maintaining certifications/accreditations.

Champion: Steve Hoffman

Others on team: Sherry Early-Aden, Trudy Adams, Veronica Mertz, Mary Lee Freeze, Pam Brookshire

| Step | Action | Person Responsible | Target Date | Status |
|------|---|--------------------------|-------------|--------|
| 1 | Fiscal | | | |
| 2 | See Fiscal program plan | | | |
| 3 | Conduct annual audit | Finance Committee, Mertz | 01/19 | |
| 4 | Maintain compliance with all federal, state, program fiscal regulations | Finance Committee, Mertz | Ongoing | |
| 5 | Maintain internal financial controls and maintain compliance with Brightpoint fiscal policies | Mertz | Ongoing | |
| 6 | Human Resources | | | |
| 7 | See Human Resources program plan | | | |
| 8 | Maintain compliance with all federal and state regulations | Adams | Ongoing | |
| 9 | Maintain compliance with Brightpoint personnel policies and procedures | Adams | Ongoing | |
| 10 | Program | | | |
| 11 | See program plans | | | |
| 12 | Maintain terms of each program agreement/contract | Brookshire, Freeze, Aden | Ongoing | |
| 13 | Certifications/Accreditations | | | |
| 14 | Maintain Comprehensive Administrative Review (CAR) requirements | Hoffman | Ongoing | |
| 15 | Maintain United Way Standards accreditation | Hoffman | Ongoing | |
| 16 | Maintain Better Business Bureau accreditation | Hoffman | Ongoing | |

Goal 4: Enhance Brightpoint’s operational excellence by increasing our capacity to achieve results.

Goal 4b: Increase our organizational presence in our rural communities and South Bend.

Champion: Steve Hoffman

Others on team: Sherry Early-Aden, Mary Lee Freeze, Pam Brookshire

| Step | Action | Person Responsible | Target Date | Status |
|------|--|--------------------|-------------|--------|
| 1 | <i>South Bend</i> | | | |
| 2 | Raise funds for BDF employee to be stationed in South Bend | Aden | 09/19 | |
| 3 | Hire BDF staffperson | Aden | 12/19 | |
| 4 | Seek partners who can “sell” CLC program | Hoffman | 12/19 | |
| 5 | Secure first employment partner for CLC in South Bend | Hoffman | 03/20 | |
| 6 | Determine community groups we are currently engaged with in South Bend | Brookshire | 06/19 | |
| 7 | Determine staff capability to participate with community groups | Brookshire | 06/19 | |
| 8 | Assign staff to key community groups, as feasible | Brookshire | 09/19 | |
| 9 | Develop relationship with United Way of St. Joseph County | Hoffman | 12/20 | |
| 10 | Connect with Real Services to determine how we can work together | Hoffman | 12/20 | |
| 11 | Utilize banking partners in the region to help us engage in South Bend | Aden | 12/21 | |
| 12 | Explore housing development opportunity in South Bend | Hoffman | 12/21 | |
| 13 | <i>Rural Counties (not Allen or St. Joseph)</i> | | | |
| 14 | Secure seven new counties within our service area for CCDF program | Brookshire | 02/19 | |
| 15 | Apply for OFA funding from each county’s community foundation | McClure | 12/21 | |
| 16 | Determine community groups we are currently engaged with in counties | Brookshire | 06/20 | |

| | | | | |
|----|--|------------|-------|--|
| 17 | Determine staff capability to participate with community groups | Brookshire | 06/20 | |
| 18 | Assign staff to key community groups, as feasible | Brookshire | 09/20 | |
| 19 | Determine which staff live in rural counties | Brookshire | 06/21 | |
| 20 | Work to secure board memberships for staff that live in rural counties | Hoffman | 12/21 | |
| 21 | Explore hiring a county outreach coordinator | Hoffman | 12/21 | |
| 22 | Utilize RV to deliver services to 6 rural cities/towns | Brookshire | 12/19 | |
| 23 | Develop volunteer cadre to drive RV | Brookshire | 12/20 | |
| 24 | Utilize RV to deliver services to 15 rural cities/towns in 2021 | Brookshire | 12/21 | |

Goal 4: Enhance Brightpoint’s operational excellence by increasing our capacity to achieve results.

Goal 4c: Enhance customer service at all levels and departments of the organization.

Champion: Steve Hoffman

Others on team: Sherry Early-Aden, Mary Lee Freeze, Pam Brookshire, Lesa Cassel, Andrew Applegate

| Step | Action | Person Responsible | Target Date | Status |
|------|--|--------------------------|-------------|--------|
| 1 | Increase Brightpoint’s net promotor score to 30 | | | |
| 2 | Develop quality assurance system | Applegate | 06/19 | |
| 3 | Conduct initial baseline surveys | Applegate | 08/19 | |
| 4 | Implement ongoing quality assurance system | Applegate | 12/19 | |
| 5 | Develop customer service guidelines in Family Support | Cassel | 08/19 | |
| 6 | Provide customer service training in Family Support | Cassel | 09/19 | |
| 7 | Develop and implement customer service guidelines for the organization | Hoffman | 06/20 | |
| 8 | Develop and implement guidelines custom for each department | Brookshire, Aden, Freeze | 06/21 | |
| 9 | Develop customer service measurements for each department | Applegate | 06/21 | |
| 10 | Conduct measurements | Applegate | 12/21 | |
| 11 | Establish annual Dialogues on Poverty | Brase | 12/19 | |
| 12 | Develop client advisory committee plan | Hoffman | 12/19 | |
| 13 | Establish client advisory committees for each major program | Hoffman | 12/20 | |

Goal 4: Enhance Brightpoint’s operational excellence by increasing our capacity to achieve results.

Goal 4d: Grow our financial reserve to \$1.4 million.

Champion: Steve Hoffman

Others on team: Board committees

| Step | Action | Person Responsible | Target Date | Status |
|-------------|--|---------------------------|--------------------|---------------|
| 1 | Maintain investment portfolio to ensure at least 5% returns each year. Targets: 2019=\$1,155,000, 2020=\$1,212,750, 2021=\$1,273,387 | Hoffman | 12/21 | |
| 2 | Increase fundraising to \$300,000 annually, and target 10% annually to reserve funds. Targets: 2019=\$30,000, 2020=\$30,000, 2021=\$30,000 | Hoffman | 12/21 | |
| 3 | Maintain organizational budgets to ensure no deficits | Hoffman | 12/19 | |
| 3 | Manage organizational finances to ensure portion of developer fees, profits, and operating grants can be earmarked to reserve fund each year. Target: \$138,000 | Hoffman | 12/21 | |

Goal 4: Enhance Brightpoint’s operational excellence by increasing our capacity to achieve results.

Goal 4e: Expand staff capacity within the organization

Champion: Steve Hoffman

Others on team: Sherry Early-Aden, Pam Brookshire, Mary Lee Freeze, Trudy Adams

| Step | Action | Person Responsible | Target Date | Status |
|------|---|--------------------|-------------|--------|
| 1 | Develop budget resources needed for staff expansion | Hoffman | 12/21 | |
| 2 | Increase fiscal staff capacity by one FTE | Hoffman | 12/20 | |
| 3 | Increase human resources staff capacity by at least 0.5 FTE | Hoffman | 12/21 | |
| 4 | Hire BDF Manager | Aden | 03/19 | |
| 5 | Hire BDF staffperson to service South Bend area | Aden | 12/19 | |
| 6 | Increase management capacity within JAG and CKF | Brookshire | 12/20 | |
| 7 | Hire Assistant Early Childhood Education Manager | Freeze | 12/20 | |
| 8 | Hire center-based EHS Site Supervisor | Freeze | 12/21 | |
| 9 | Increase the capacity to serve clients in Family Development from 4 case managers to 6. | Brookshire | 12/21 | |
| 10 | Increase staff capacity within Family Support by 2 FTEs | Brookshire | 12/21 | |
| 11 | Hire Life Skills training coordinator | Brookshire | 03/20 | |
| 12 | Explore plan for 4 division organizational structure | Hoffman | 12/21 | |

Goal 4: Enhance Brightpoint’s operational excellence by increasing our capacity to achieve results.

Goal 4f: Enhance the culture and environment of the organization through implementation of values, improved communication, and increased morale.

Champion: Steve Hoffman

Others on team: Sherry Early-Aden, Pam Brookshire, Mary Lee Freeze, Monica Woods, Jennie Renner, Trudy Adams

| Step | Action | Person Responsible | Target Date | Status |
|------|---|--------------------|-------------|--------|
| 1 | Incorporate values into customer service guidelines | Hoffman | 06/20 | |
| 2 | Develop schedule of directors visiting staff meetings | Woods | 06/19 | |
| 3 | Develop schedule of directors visiting sites | Woods | 06/19 | |
| 4 | Develop internal newsletter | Renner | 12/19 | |
| 5 | Maintain bi-monthly managers meetings | Hoffman | 02/19 | |
| 6 | Develop schedule of inter-departmental road shows | Renner | 03/19 | |
| 7 | Maintain wellness program | Adams | 12/19 | |
| 8 | Increase usage of wellness suite | Brase | 12/19 | |
| 9 | Develop and administer employee survey on employee benefits | Adams | 04/19 | |
| 10 | Develop and administer annual employee survey | Adams | 12/19 | |
| 11 | Develop plan of action based on survey results | Hoffman | 02/20 | |
| 12 | Provide funds for employee morale initiatives | Hoffman | 06/19 | |
| 13 | Develop internal morale initiatives | Hoffman | 12/19 | |
| 14 | Establish more “fun” days within the organization | Adams | 12/19 | |
| 15 | Promote and expand mentoring program | Hoffman | 12/19 | |

Goal 4: Enhance Brightpoint’s operational excellence by increasing our capacity to achieve results.

Goal 4g: Increase and enhance partnerships that support the initiatives of goals 1, 2, and 3.

Champion: Steve Hoffman

Others on team: Sherry Early-Aden, Pam Brookshire, Mary Lee Freeze, Andrew Applegate

| Step | Action | Person Responsible | Target Date | Status |
|------|---|--------------------|-------------|--------|
| 1 | Maintain inventory of current partnerships | Applegate | 12/19 | |
| 2 | Determine needed services for clients | Hoffman | 03/20 | |
| 3 | Inventory organizations that provide needed services | Applegate | 05/20 | |
| 4 | Develop plan to negotiate with targeted organizations | Hoffman | 8/20 | |
| 5 | Negotiate with organizations | Hoffman | 08/21 | |
| 6 | Finalize partnerships | Hoffman | 12/21 | |

Goal 4: Enhance Brightpoint’s operational excellence by increasing our capacity to achieve results.

Goal 4h: Increase utilization of technology accelerators that enhance service delivery and increase capacity to achieve results.

Champion: Scott Kinsey

Others on team: Sherry Early-Aden, Deb Brase, Jennie Renner, Pam Brookshire

| Step | Action | Person Responsible | Target Date | Status |
|------|---|--------------------|-------------|--------|
| 1 | See IT program plan | | | |
| 2 | Establish board area of Policystat | Brase | 06/19 | |
| 3 | Develop CKF and Family Development databases | Brookshire | 12/19 | |
| 4 | Develop BDF website | Aden | 03/19 | |
| 5 | Develop mobile technologies to enhance text reminders and communication | Kinsey | 12/20 | |
| 6 | Develop Brightpoint phone app | Aden | 12/21 | |
| 7 | Develop video-conferencing capability for programs and departments | Kinsey | 12/19 | |
| 8 | Utilize video development capabilities to enhance training, communication, etc. | Renner, Kinsey | 08/20 | |

Objectives for
Long Range Goal #5

Goal 5: Increase public awareness and advocacy of both poverty and Brightpoint, and develop new revenue sources through a comprehensive development program.

Goal 5a: Raise awareness of poverty and the issues that low-income families face, as well as the assets that low-income families have.

Champion: Steve Hoffman

Others on team: Sherry Early-Aden, Andrew Applegate, Jennie Renner

| Step | Action | Person Responsible | Target Date | Status |
|------|---|--------------------|-------------|--------|
| 1 | Raise funds specifically for public education programs/campaigns | Hoffman | 12/21 | |
| 2 | Develop print and video library of client stories | Renner | 12/20 | |
| 3 | Conduct 5 poverty simulations in 2019 | Renner | 12/19 | |
| 4 | Work with Alliance for Human Services to deliver a cause marketing campaign | Hoffman | 12/19 | |
| 5 | Develop a partnership to deliver a cause marketing campaign | Hoffman | 12/20 | |
| 6 | Complete LIHTC study by IIWF | Hoffman | 12/19 | |
| 7 | Sponsor a local event/video presentation that raises profile of low-income families | Renner | 06/20 | |
| 8 | Enhance the Community Needs Assessment | Applegate | 06/19 | |
| 9 | Promote CNA | Renner | 07/19 | |
| 10 | Develop white paper and “publish” to community partners, leaders, etc. | Hoffman | 12/20 | |

Goal 5: Increase public awareness and advocacy of both poverty and Brightpoint, and develop new revenue sources through a comprehensive development program.

Goal 5b: Increase recognition of Brightpoint through public relations and education

Champion: Jennie Renner

Others on team: Sherry Early-Aden, RD Committee, Steve Hoffman, Rachel Wise

| Step | Action | Person Responsible | Target Date | Status |
|-------------|---|---------------------------|--------------------|---------------|
| 1 | <i>See Development plan for annual marketing plan</i> | | | |
| 2 | <i>Maintain Brightpoint Events</i> | | | |
| 3 | Maintain golf outing | RD Committee | 06/19 | |
| 4 | Conduct 5 poverty simulations in 2019 | Renner | 12/19 | |
| 5 | <i>Establish Brightpoint Speakers Bureau</i> | | | |
| 6 | Update presentation | Renner | 01/19 | |
| 7 | Recruit and train speakers: 6 staff, 4 volunteers | Hoffman | 04/19 | |
| 8 | Develop strategy for increasing speaking engagements | Renner | 06/19 | |

Goal 5: Increase public awareness and advocacy of both poverty and Brightpoint, and develop new revenue sources through a comprehensive development program.

Goal 5b: Increase Brightpoint’s annual fundraising campaign to \$350,000 annually.

Champion: Jennie Renner

Others on team: Sherry Early-Aden, RD Committee, Steve Hoffman, Rachel Wise

| Step | Action | Person Responsible | Target Date | Status |
|-------------|--|---------------------------|--------------------|---------------|
| 1 | <i>See development plan for annual campaign plan</i> | | | |
| 2 | Maintain 100% board and executive staff giving annually | RD Committee | 12/19 | |
| 3 | Maintain and improve United Way campaign | Renner | 06/19 | |
| 4 | Increase 20x20 challenge to 125 donors and \$5,500 | RD Committee | 12/19 | |
| 5 | Maintain Brightpoint Golf and increase profit to \$30,000 | RD Committee | 12/19 | |
| 6 | Increase Brightpoint endowment to \$100,000 | Hoffman | 12/21 | |
| 7 | Increase bank giving to \$100,000 annually | Hoffman | 12/21 | |
| 9 | Increase individual donors to 500 and individual donation amount to \$100,000. | RD Committee | 12/21 | |
| 10 | Increase non-bank corporate giving to \$50,000 annually | RD Committee | 12/21 | |

Goal 5: Increase public awareness and advocacy of both poverty and Brightpoint, and develop new revenue sources through a comprehensive development program.

Goal 5c: Diversify Brightpoint’s financial resources by expanding existing sources and accessing new ones

Champion: Steve Hoffman
Others on team: Board, VPs

| Step | Action | Person Responsible | Target Date | Status |
|-------------|------------------------------------|---------------------------|--------------------|---------------|
| 1 | See Brightpoint’s Case for Support | Hoffman | 12/21 | |

Goal 5: Increase public awareness and advocacy of both poverty and Brightpoint, and develop new revenue sources through a comprehensive development program.

Goal 5d: Enhance Brightpoint’s public advocacy capacity at the local, state, and national levels.

Champion: Steve Hoffman

Others on team: Board, VPs

| Step | Action | Person Responsible | Target Date | Status |
|------|--|--------------------|-------------|--------|
| 1 | Build relationships with Mayor Henry and Fort Wayne City Councilman | Hoffman | 12/20 | |
| 2 | Conduct information sharing meetings with mayors of other key cities in service area | Hoffman | 12/21 | |
| 3 | Conduct legislative breakfast for state senators and representatives | Giaquinta, Hoffman | 12/19 | |
| 4 | Build relationships with state senators and representatives, targeting most strategic | Hoffman | 12/21 | |
| 5 | Maintain relationships with local staff for our members of Congress | Hoffman | 12/21 | |
| 6 | Secure meeting with Congressman Banks | Jehl | 12/19 | |
| 7 | Secure meeting with Senator Young | Busch | 12/19 | |
| 8 | Secure meeting with Senator Donnelly | Hoffman | 12/19 | |
| 9 | Maintain relationships with state administrators | Hoffman, VPs | 12/21 | |
| 10 | Develop volunteer advocate pool | Hoffman | 12/19 | |
| 11 | Maintain membership support of advocacy efforts with NCAF, INCAA, and Prosperity Indiana | Hoffman | 12/19 | |
| 12 | Maintain seat on United Way of Allen County public policy committee | Hoffman | 12/19 | |
| 13 | Register as Indiana lobbyist | Hoffman | 12/19 | |
| 14 | <i>Support specific advocacy efforts through communication, testimony, mobilization, etc.</i> | Hoffman | Ongoing | |