



For a Brighter Future.

Strategic Plan

2025

Steve Hoffman, President/CEO

Approved by Board: January 16, 2025

Introduction

The following pages outline Brightpoint's strategic plan for the next three years, through the end of 2027. 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 have 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.

The words used at the start of goals and objectives are key to understanding the plan. "Provide" signifies an objective that is about delivering services that Brightpoint currently operates and we are setting an annual target for that service. Words like "expand", "increase", and "enhance" signify an effort to expand or enhance existing services or capacity. Finally, words like "develop" signify that we are trying to build entirely new services or capacity for the organization.

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 2025-2027 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 2025-27

- 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. (Family)
 - 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). (Family)
 - c) Provide utility assistance via the Energy Assistance Program (EAP) and add programming to help fill the gaps of service need in this area. (Family)
 - d) 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. (Family)
 - e) Provide health insurance via the Covering Kids and Families program. (Family)
 - f) Develop new services that help families meet their transportation needs. (Family)
 - g) Enhance existing services and partnerships to create greater access to employment for our clients. (Family)
 - h) Provide and expand the Bounce Back program. (Family)
- 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. (Family)
 - b) Provide and expand Head Start (HS) services to children ages 3-5. (Family)
 - c) Provide and expand the Jobs for America's Graduates (JAG) program. (Family)
 - d) Develop the capacity of child care provision within our service area. (Agency)
- 3) Increase the provision of services that build assets for families and improve the community conditions in which they live.
 - a) Increase consumer lending from \$1.5 million to \$3 million per year. (Family)
 - b) Increase small business lending from \$500,000 to \$2 million per year. (Community)
 - c) Expand automobile loan program from \$60,000 to \$300,000 per year. (Community)
 - d) Establish a small-scale housing development program. (Community)

- e) Complete the sale of individual homes to clients at Heritage Homes and Hopewell Pointe. (Community)
 - f) Develop 50 units of affordable housing. (Community)
 - g) Provide and expand the Weatherization (WX) program. (Family)
 - h) Expand our impact in BDF by piloting a home mortgage program and supporting the establishment of a land bank in Allen County. (Family)
- 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. (Agency)
 - b) Enhance our succession planning for our top three levels of management. (Agency)
 - c) Improve the client management system within the organization. (Agency)
 - d) Enhance customer service at all levels and departments of the organization. (Agency)
 - e) Grow our financial reserve from \$1.9 million to \$2.4 million. (Agency)
 - f) Expand staff capacity within the organization. (Agency)
 - g) Increase and enhance partnerships that support goals 1, 2, and 3. (Agency)
- 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. (Community)
 - b) Increase recognition of Brightpoint and its mission through public relations and education. (Agency)
 - c) Increase Brightpoint's annual fundraising campaign from \$560,000 to \$700,000 annually. (Agency)
 - d) Diversify Brightpoint's financial resources by expanding existing sources and accessing new ones. (Agency)
 - e) Enhance our public advocacy influence at the local, state, and national levels. (Community)

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, Catherine Grimes, Olivia Garrison, Beth Kerg

Step	Action	Person Responsible	Target Date	Status
1	Provide Family Development to 400 families by 12/31/25	Grimes	12/25	
2	See program plan			
3	Provide Outcomes Financial Assistance (OFA) to 20 families by 12/31/25	Grimes	12/25	
4	See program plan			
5	Increase the capacity to serve clients in Family Development.	Brookshire		
6	Secure increased EAP Assurance 16 funding to increase case management staff by 2 (40 slots)	Brookshire	12/25	
7	Secure funding to increase Family Development caseload by 20 slots	Brookshire	12/27	
8	Organize the Family Development department to maximize ability to serve clients and increase caseloads.	Brookshire	12/26	
9	Develop new data management systems within the Family Development department to more effectively manage services.	Brookshire	12/25	
10	Enhance Family Development services by updating case management curriculum.	Brookshire	12/25	
11	Establish procedures that include more home-visiting and face time with clients	Grimes	12/25	
12	Analyze and enhance financial literacy/budgeting component	Brookshire	12/25	
13	Analyze and enhance job search component	Brookshire	12/25	
14	Establish life skills component	Brookshire	12/26	
15	Establish education/training protocols	Brookshire	06/27	
16	Increase OFA funding pool by 100%, to \$160,000 annually.			

Step	Action	Person Responsible	Target Date	Status
16	Secure \$80,000 in existing budgets to be set-aside for OFA	Hoffman	03/25	
17	Research new foundation prospects for OFA in our service area	Renner	12/25	
18	As the opportunity arises, set aside flexible financial assistance in existing programs	Brookshire	12/27	
19	Secure funding from new sources that are not traditional to Brightpoint	Hoffman	12/27	

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: Catherine Grimes, Olivia Garrison, Beth Kerg, Matt Beer

Step	Action	Person Responsible	Target Date	Status
1	<i>Provide HCVP to 400 families by 12/31/25</i>	Beer	12/25	
2	See program plan			
3	Increase HCVP capacity to 600 families	Beer	12/27	
4	<i>Provide PSH to 65 families by 09/30/25</i>	Beer	09/25	
5	See program plan			
6	<i>Provide ESG to 40 families by 12/31/25</i>	Grimes	12/25	
7	See program plan			
8	<i>Provide SSVF to 95 families by 09/30/25</i>	Grimes	09/25	
9	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, Andrea Dawkins, Anne Adams

Step	Action	Person Responsible	Target Date	Status
1	<i>Provide Energy Assistance to 8,000 families by 9/30/25</i>	Cassel	9/22	
2	See program plan			
3	<i>Increase funding for utility deposits, disconnect fees, clients above EAP guidelines (Goal of \$40,000)</i>			
4	Cultivate funding from NIPSCO	Hoffman	09/27	
5	Cultivate funding from AEP	Hoffman	09/27	
6	Assist INCAA with statewide funding efforts	Hoffman	12/27	

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

Objective 1d: 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 Dawkins, Anne Adams

Step	Action	Person Responsible	Target Date	Status
1	<i>Provide CCDF to 10,000 children by 09/30/25</i>	Cassel	09/25	
2	See program plan			
3	<i>Provide On-My-Way Pre-K to 600 children by 09/30/25</i>	Cassel	09/25	
4	See program plan			
5	<i>Increase the capacity to serve clients on the child care waiting lists from \$100,000 to \$160,000</i>	Brookshire	12/27	
6	Maintain LEAP Kosciusko funding for waiting list families	Brookshire	12/27	
7	Cultivate funding from United Way of St. Joseph County	Hoffman	12/27	
8	Determine ways to expand the pool via flexible dollars in existing programs	Brookshire	12/27	
9	Secure donations/grants that add to our pool	Hoffman	12/27	

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 health care assistance via the Covering Kids and Families (CKF) program.

Champion: Pam Brookshire

Others on team: Temecula Nelson, Quay Jones

Step	Action	Person Responsible	Target Date	Status
1	<i>Provide CKF to 2,000 households by 12/31/25</i>	Nelson	12/25	
2	See program plan			
3	<i>Expand expertise into Medicare services</i>		12/27	
4	Identify staff expertise and assign responsibilities	Nelson	12/25	
5	Secure training/information	Nelson	12/26	
6	Explore potential lines of business for CKF under this area	Nelson	12/27	

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

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

Champion: Steve Hoffman

Others on team: Pam Brookshire, Matt Crouch, Eric Ogle, Catherine Grimes

Step	Action	Person Responsible	Target Date	Status
1	<i>Expand automobile loan program to 50 loans</i>		12/27	
2	Secure CDFI funding to expand loan pool	Crouch	12/27	
3	Secure loan pool dollars from banks	Hoffman	12/27	
4	Expand access to auto loans to new client pools, including Head Start/Early Head Start, BP housing developments, Broker collaboration	Hoffman	06/25	
5	<i>Increase use of OFA for transportation needs to \$40,000</i>	Brookshire	12/25	
6	<i>Develop an auto maintenance/repair services</i>			
7	Support development of Noble County Program	Hoffman	12/25	
8	Design internal program for auto repair needs	Hoffman	12/25	
9	Secure auto maintenance partners in community	Hoffman	06/26	
10	Launch services	Brookshire	12/26	
11	<i>Develop auto collaboration with Community Transportation Network</i>			
12	Complete program design	Crouch	03/25	
12	Pilot with 2 clients	Crouch	12/25	
13	Determine scaling needs	Crouch	12/25	
14	Increase numbers in years two and three	Crouch	12/27	
15	<i>Support advocacy efforts to improve transportation services in service area</i>			
16	Advocate for Citilink to maintain and expand budget	Hoffman	12/25	
17	Support collaborative efforts/convenings to increase transportation services	Hoffman	12/27	

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

Objective 1g: Enhance existing services and partnerships to create greater access to employment for our clients.

Champion: Steve Hoffman

Others on team: Pam Brookshire, Rachel Bryant, Thomas Rust

Step	Action	Person Responsible	Target Date	Status
1	<i>Explore ways to expand Focus Forward</i>			
2	Map out curriculum that is transferrable to clients aged 25+	Brookshire	12/25	
3	Invest in staff to serve additional clients, targeted at 25+	Hoffman	12/26	
4	Secure new revenue source for Focus Forward	Hoffman	12/27	
5	Develop plan to engage more employers and develop jobs for Focus Forward clients.	Bryant	12/26	

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

Objective 1h: Provide and expand the Bounce Back program

Champion: Steve Hoffman

Others on team: Pam Brookshire, Hayley Lichtsinn

Step	Action	Person Responsible	Target Date	Status
1	<i>Provide Bounce Back to 150 households by 12/31/25</i>	Lichtsinn	12/25	
2	See program plan			
3	<i>Increase assistance amount to \$400,000 annually</i>	Lichtsinn	12/25	
4	Increase good referrals from existing partners	Lichtsinn	12/25	
5	Expand number of church partners to 60	Lichtsinn	12/25	
6	Expand number of Catholic church partners to 4	Hoffman	12/25	
7	<i>Expand funding available to Bounce Back to \$750,000 (\$600,000 in assistance)</i>	Hoffman	12/27	
8	Cultivate additional donors through DR Financial	Hoffman	12/27	
9	Add at least one donor from another financial planning firm	Hoffman	12/27	

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: Lisa Kipker, Pam Mason, Deanna Backman, Theresa Dorais, Tammy Pifer

1	<i>Provide EHS to 130 children by 10/31/25</i>	Freeze	10/25	
2	See program plan			
3	<i>Increase number of EHS slots by 50.</i>	Freeze	10/27	
4	Determine expansion details (locations, staffing, etc.)	Freeze	03/25	
5	Analyze HHS expansion opportunities and apply when possible	Freeze	Ongoing	
6	Secure funding	Freeze	05/27	
7	Implement expansion plan	Freeze	10/27	
8	<i>Explore ways to promote/support Head Start standards to other child care centers, home-schoolers, etc.</i>	Freeze	12/23	

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, Tammy Pifer

1	<i>Provide HS to 675 children by 10/31/25</i>	Freeze	10/25	
2	See program plan			
3	<i>Implement expansion into Adams and Huntington Counties</i>	Freeze	06/25	
4	See program plan			
5	Permanently increase slots to 735	Freeze	10/25	
6	<i>Create partnerships with 2 local schools to share data to track child progress</i>	Freeze	12/27	
7	<i>Develop and implement marketing strategy to be seen as the provider of choice</i>	Freeze	12/27	

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

Objective 2c: Provide and expand the Jobs for America’s Graduates (JAG) program.

Champion: Pam Brookshire

Others on team: Rachel Bryant, Steve Hoffman, Christine Koegler, Autumn Johnson

1	<i>Provide JAG to 560 youth by 5/31/25</i>	Bryant	05/25	
2	See program plan			
3	Add 8 schools to program, to 22 total	Bryant	05/25	
4	Successfully implement program in new schools	Bryant	12/25	
5	Increase overall enrollment to 840	Bryant	12/27	
6	<i>Pilot JAG program for Freshman and Sophomore levels in two schools</i>			
7	Determine curriculum	Bryant	02/25	
8	Hire staff, acquire materials, etc.	Bryant	05/25	
9	Enroll students	Bryant	08/25	
10	Implement program and track key findings throughout school year	Bryant	05/26	

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

Goal 2d: Develop capacity of child care provision within our service area.

Champion: Steve Hoffman

Others on team: Pam Brookshire, Matt Crouch, Lesa Cassel, Tammy Pifer

1	Support capacity growth of the Northeast Indiana Early Childhood Coalition	Hoffman		
2	Serve as fiscal sponsor to coalition	Hoffman	Ongoing	
3	Support implementation of tri-share pilot	Pifer	12/25	
4	Help coalition build capacity to secure its own 501c3 status	Crouch	12/26	
5	Support capacity-building efforts for coalition to operate on its own	Crouch	12/26	
6	Join the coalition in advocacy efforts and other potential pilot projects	Hoffman	12/27	
4	Explore Brightpoint role in Child Care Resource and Referral activities	Brookshire		
5	Evaluate what elements Brightpoint can provide and at what level	Brookshire	06/25	
6	Redesign current processes to include CCRR work in agency operations	Brookshire	09/25	
7	Launch services	Brookshire	12/27	

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 from \$1.5 million to \$3 million per year.

Champion: Steve Hoffman

Others on team: Matt Crouch, Eric Ogle

1	Maintain current employers on program	Crouch	12/27	
2	Develop detailed employer prospect list	Crouch	03/25	
3	Develop action plan, including timeline, of employer recruitment	Crouch	03/25	
4	Begin employer recruitment plan	Crouch	06/25	
5	Increase partner employee base to 22,000	Crouch	06/26	
6	Secure \$50,000 in increased capacity funding	Crouch	06/26	
7	Secure \$1.5 million in EQ2 funding for loan pool	Hoffman	12/25	
8	Secure \$1.5 million in LOC funding for loan pool	Hoffman	12/25	
9	Secure \$100,000 in loan loss reserve funding per year	Hoffman	12/27	
10	Grow loan volume to \$2 million	Crouch	12/25	
11	Grow loan volume to \$2.5 million	Crouch	12/26	
12	Grown loan volume to \$3 million	Crouch	12/27	
13	Expand financial education to 350 participants	Crouch	12/26	

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 from \$500,000 to \$1.3 million per year.

Champion: Matt Crouch

Others on team: Steve Hoffman, Eric Ogle

1	Maintain SBA and CDFI capacity funding to ensure program self-sufficiency	Crouch	12/25	
2	Maintain SBA loan funding of at least \$500,000 per year	Crouch	12/27	
3	Increase CDFI loan funding to \$250,000	Crouch	12/27	
4	Implement Legacy funding of \$500,000 per year, which includes \$425,000 in loan pool.	Crouch	12/27	
5	Secure at least \$125,000 of loan pool funding from other sources	Hoffman	12/27	
6	Secure \$100,000 annually for loan-loss reserve	Crouch	12/27	
7	Increase street outreach to secure 40 loans per year	Crouch	12/26	
8	Increase bank referrals to secure 26 loans per year	Crouch	12/26	
9	Increase referrals in South Bend and Elkhart to secure 6 loans per year	Crouch	12/26	
10	Maintain post-loan TA to ensure success of client	Ogle	12/27	
11	Maintain post-loan monitoring to ensure low default rate	Ogle	12/27	
12	Strengthen BDF Board composition	Crouch	12/25	

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 from \$60,000 to \$300,000 per year.

Champion: Steve Hoffman

Others on team: Matt Crouch, Eric Ogle

1	Increase borrowers among Brightpoint client base to 20	Crouch	12/26	
2	Expand product offering to Brightpoint housing developments	Crouch	08/25	
3	Maintain underwriting and servicing guidelines	Ogle	12/27	
4	Test with selected CLC clients	Crouch	12/27	
5	Secure \$100,000 in new loan pool	Hoffman	12/26	
6	Develop and maintain partnership with CTN program	Crouch	12/25	

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

Goal 3d: Establish a small-scale housing development program

Champion: Matt Crouch

Others on team: Steve Hoffman, Derrick DeBruce

1	<i>Develop 10 units to add to our rental inventory (including at least 2 new counties)</i>			
2	Find appropriate properties	Crouch	06/26	
3	Secure capital	Crouch	12/26	
4	Rehab properties	DeBruce	06/27	
5	Develop and maintain rental policies	DeBruce		
6	Lease up properties	DeBruce	12/27	
7	<i>Develop 3 homes to add to our rent-to-own inventory</i>			
8	Find appropriate properties	Crouch	06/26	
9	Secure capital	Crouch	12/26	
10	Rehab properties	DeBruce	06/27	
11	Lease up properties	DeBruce	12/27	
12	<i>Determine use of Oak St. Property in Columbia City</i>	Hoffman	12/25	
13	<i>Develop housing development capacity of Whitley Crossings Development Corporation</i>			
14	Maintain Community Housing Development Organization Certification (CHDO) through IHCD	Crouch	03/25	
15	Align name and coverage area with Brightpoint	Crouch	06/25	
16	Enhance board composition	Crouch	12/26	

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

Goal 3e: Complete the sale of individual homes to clients at Heritage Homes and Hopewell Pointe

Champion: Matt Crouch

Others on team: Steve Hoffman, Kayla Wigent, Derrick Debruce

1	<i>Heritage Homes</i>			
2	Prepare clients for purchase	Crouch	12/25	
3	Secure financing for clients	Crouch	03/26	
4	Close sales on all homes	Wigent	12/26	
5	<i>Hopewell Pointe</i>			
6	Prepare clients for purchase	Crouch	12/26	
7	Secure financing for clients	Crouch	03/27	
8	Close sales on all homes	Wigent	12/27	

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

Goal 3f: Develop 50 units of affordable units.

Champion: Steve Hoffman

Others on team: Dawn Gallaway, Matt Crouch

1	<i>Establish next housing project</i>			
2	Locate site	Hoffman	12/25	
3	Determine project scope	Hoffman	03/26	
4	Develop pro forma	Gallaway	04/26	
5	Develop site plan		05/26	
6	Develop tax credit funding application	Gallaway	07/26	
7	Secure funding	Gallaway	12/26	

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

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

Champion: Pam Brookshire

Others on team: Joel Harms

1	<i>Provide Weatherization to 80 households by 9/30/25</i>	Harms	09/25	
2	See program plan			
3	<i>Expand Weatherization production via the Bipartisan Infrastructure Law to 140 units</i>	Harms	09/25	
4	<i>Seek supplemental funds to provide extra services and deal with deferrals</i>	Brookshire	12/26	

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

Goal 3h: Expand our impact in BDF by piloting a home mortgage program and supporting the establishment of a land bank in Allen County.

Champion: Matt Crouch

Others on team: Steve Hoffman,

1	<i>Pilot a home mortgage program</i>	Crouch		
2	Develop lending and underwriting guidelines	Crouch	06/25	
3	Secure licensure to provide mortgages	Crouch	12/26	
4	Secure loan pool	Crouch	12/26	
5	Recruit appropriate borrowers	Crouch	12/27	
6	Provide mortgages to 5 borrowers	Crouch	12/27	
7	<i>Support establishment of a land bank in Allen County</i>	Hoffman	12/27	

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: Trudy Adams, Veronica Mertz, Mary Lee Freeze, Pam Brookshire, Matt Crouch, Kristi Stull

1	Fiscal			
2	See Fiscal program plan			
3	Conduct annual audit	Finance Committee, Mertz	05/25	
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, Crouch	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: Enhance our succession planning for our top three levels of management.

Champion: Steve Hoffman

Others on team: Mary Lee Freeze, Pam Brookshire, Veronica Mertz, Matt Crouch

1	<i>Update existing succession plan</i>	Hoffman	12/25	
2	<i>Prepare for future succession</i>			
3	Identify future plan of the CEO	Governance Committee	06/25	
4	Identify future plans of Vice-Presidents and Managers	Hoffman	06/25	
5	Develop leadership skills of all managers	Hoffman	12/27	
6	Develop search processes for all positions to be prepared for any contingency	Hoffman	12/27	
7	Determine parts of Vice-President responsibilities that can be delegated to managers	VPs	06/25	
8	Determine parts of manager responsibilities that can be delegated to other staff	VPs	06/25	
9	Shift responsibilities and provide managers with other developmental opportunities	VPs	12/26	
10	Establish a professional development program	Hoffman	12/26	

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

Goal 4c: Improve the client management system within the organization.

Champion: Pam Brookshire

Others on team: Steve Hoffman, Tammy Pifer, Mary Lee Freeze, Veronica Mertz, Matt Crouch, Lesa Cassel

1	<i>Establish an agency-wide client database</i>			
2	Analyze agency needs and determine project roles of staff	Hoffman	03/25	
3	Research products and what other organizations use	Brookshire	06/25	
4	Engage with providers and collect bids	Brookshire	08/25	
5	Determine database and purchase	Hoffman	12/25	
6	Develop/customize database for our use	Brookshire	04/26	
7	Develop user policies and procedures	Brookshire	04/26	
8	Train staff	Brookshire	06/26	
9	Launch database	Brookshire	10/26	
10	<i>Enhance program systems within organizations</i>			
11	Develop new client management systems within the Family Development department to more effectively manage services.	Brookshire	06/25	
12	Improve data collection and outcome measurement systems in Head Start/Early Head Start	Pifer	12/27	
13	Fully implement new data systems in Family Support, Family Development, and Covering Kids and Families	Brookshire	12/26	
14	Update reporting package in the Brightpoint Development Fund	Crouch	12/26	
15	Publish statistics more regularly on social media	Renner	12/26	

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

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

Champion: Steve Hoffman

Others on team: Veronica Mertz, Mary Lee Freeze, Pam Brookshire, Lesa Cassel, Jonathan Garner

1	Increase Brightpoint’s net promotor score to 30			
2	Develop quality assurance system	Garner	06/25	
3	Conduct initial baseline surveys	Garner	08/25	
4	Implement ongoing quality assurance system	Garner	12/25	
5	Develop customer service guidelines in Family Support	Cassel	08/25	
6	Provide customer service training in Family Support	Cassel	09/25	
7	Develop and implement customer service guidelines for the organization	Hoffman	06/26	
8	Develop and implement guidelines custom for each department	Brookshire, Freeze, Crouch, Mertz	06/26	
9	Develop customer service measurements for each department	Brookshire, Freeze, Crouch, Mertz	06/26	
10	Conduct measurements	Garner	12/26	
11	Establish annual Dialogues on Poverty	Mertz	12/27	
12	Develop client advisory committee plan	Hoffman	06/27	
13	Establish client advisory committees for each major program	Hoffman	12/27	

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

Goal 4e: Grow our financial reserve from \$1.9 million to \$2.4 million.

Champion: Steve Hoffman

Others on team: Finance Committee

1	Maintain investment portfolio to ensure at least 5% returns each year. Targets: 2025=\$1,995,000, 2026=\$2,094,750 2027=\$2,199,488	Hoffman	12/27	
2	Increase fundraising to \$600,000 annually, and target 5% annually to reserve funds. Targets: 2025=\$25,000, 2026=\$27,500, 2027=\$30,000	Hoffman	12/27	
3	Maintain organizational budgets to ensure no deficits	Hoffman	12/27	
3	Manage organizational finances to ensure portion of developer fees, profits, and operating grants can be earmarked to reserve fund each year. Target: \$118,012 total	Hoffman	12/27	

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

Goal 4f: Enhance staff capacity within the organization

Champion: Steve Hoffman

Others on team: Veronica Mertz, Pam Brookshire, Mary Lee Freeze, Matt Crouch,

1	<i>Make each position as attractive as possible vs the competition</i>			
2	Analyze budgets and increase salaries where possible	Hoffman	06/25	
3	Review benefits and adjust package where possible	Hoffman	06/25	
4	Analyze each position and provide work-from-home to the extent possible	Mertz, Brookshire, Freeze, Crouch	06/25	
5	Analyze whether a 36-hour work week is possible	Hoffman	06/25	
6	Enhance employee morale and wellness plans	Hoffman	12/25	
7	<i>Hiring</i>			
8	Benchmark skills and abilities for key positions	Mertz, Brookshire, Freeze, Crouch	12/25	
9	Improve job postings	Mertz	06/25	
10	Update interviewing procedures (standard questions, testing, job preview, etc.)	Hoffman	12/25	
11	Engage hiring supervisor’s supervisor in hiring process	Mertz, Brookshire, Freeze, Crouch	12/25	
12	Establish hiring bonus for staff providing successful applicant referrals	Hoffman	12/25	
13	<i>Enhance commitment to Brightpoint</i>			
14	Analyze job descriptions and adjust to free up management time	Hoffman	12/26	
15	Explore potential coordinator positions that operate across departments	Hoffman	12/26	
16	Analyze emotional intelligence and integrate into systems and provide key training	Hoffman	12/27	
17	In conjunction with succession planning, provide more developmental opportunities for emerging leaders	Hoffman	12/27	

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: Matt Crouch, Pam Brookshire, Mary Lee Freeze, Jonathan Garner

1	Maintain inventory of current partnerships	Garner	12/25	
2	Determine needed services for clients	Hoffman	03/26	
3	Inventory organizations that provide needed services	Garner	05/26	
4	Develop plan to negotiate with targeted organizations	Hoffman	08/26	
5	Negotiate with organizations	Hoffman	08/27	
6	Finalize partnerships	Hoffman	12/27	

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: Jennie Renner, Veronica Mertz, Jonathan Garner

1	Raise funds specifically for public education programs/campaigns	Hoffman	12/26	
2	Develop print and video library of client stories	Renner	12/25	
3	Conduct 5 poverty simulations in 2025	Renner	12/25	
4	Work with Alliance for Human Services to deliver a human services awareness campaign	Hoffman	08/26	
5	Develop the partnership with United Way to deliver more cause marketing on the needs of people in Allen County	Hoffman	12/26	
6	Conduct print media campaign with INPUT	Renner	12/25	
7	Sponsor a local event/video presentation that raises profile of low-income families	Renner	06/26	
8	Enhance the Community Needs Assessment	Garner	09/25	
9	Promote CNA	Renner	12/25	
10	Provide three op-eds to newspaper	Hoffman	12/27	

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: RD Committee, Steve Hoffman, Outreach Committee, Veronica Mertz, Lesa Cassel

1	<i>See Development plan for annual marketing plan</i>			
2	Maintain Brightpoint Events			
3	Maintain golf outing	Renner	06/25	
4	Conduct 4 poverty simulations in 2025	Renner	12/25	
5	Conduct poverty simulation major event, to include key community decision-makers	RD Committee	12/27	
6	Conduct new market survey	Renner	03/25	
7	Analyze market survey and develop new strategies	Renner	05/25	
8	Increase marketing investment to \$200,000 over next three years			
9	Analyze budgets and map out where dollars are coming from	Hoffman	03/25	
10	Develop plan for deploying investment	Hoffman	06/25	
11	Enhance outreach, particularly to outside of Allen County			
12	Implement new Outreach Coordinator position	Renner	03/25	
13	Develop summer intern position	Renner	05/25	
14	Develop Brightpoint 101 training	Renner	05/25	
15	Develop standard presentations to meet various types of speaking engagements	Renner	07/25	
16	Identify staff who will represent Brightpoint as speakers and train	Hoffman	09/25	
17	Conduct 12 speaking engagements	Renner	09/26	

18	Inventory collaborative groups in our counties and determine which ones we need to be a part of	Renner	06/25	
19	Assign Brightpoint staff to groups to be our representative and liaison	Hoffman	12/25	
20	Maintain mobile office service	Cassel	12/25	

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

Goal 5c: Increase Brightpoint’s annual fundraising campaign from \$560,000 to \$700,000 annually.

Champion: Jennie Renner

Others on team: RD Committee, Steve Hoffman

1	<i>See development plan for annual campaign plan</i>			
2	Maintain 100% board and executive staff giving annually	RD Committee	12/25	
3	Maintain Brightpoint Golf and increase profit to \$30,000	RD Committee	12/25	
4	Increase Brighter Future Fund giving (unrestricted) to \$90,000	Hoffman	12/27	
5	Increase designated giving from individuals and corporations to \$580,000	RD Committee	12/27	
6	<i>Increase Brightpoint endowment to \$100,000</i>	Hoffman	12/27	

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

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

Champion: Steve Hoffman
Others on team: Board, VPs

1	See Brightpoint’s Case for Support	Hoffman	12/25	

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

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

Champion: Steve Hoffman

Others on team: Board, VPs

1	Build relationships with Mayor Tucker and Fort Wayne City Council members	Hoffman	12/25	
2	Conduct information sharing meetings with mayors of other key cities in service area	Hoffman	12/27	
3	Conduct legislative breakfast for state senators and representatives	Giaquinta, Hoffman	12/27	
4	Build relationships with state senators and representatives, targeting most strategic	Hoffman	12/27	
5	Maintain relationships with local staff for our members of Congress	Hoffman	12/27	
6	Secure meeting with new members of congress	Hoffman	12/25	
7	Maintain relationships with state administrators	Hoffman, VPs	12/25	
8	Develop volunteer advocate pool	Hoffman	12/27	
9	Maintain membership support of advocacy efforts with NCAF, INCAA, and Prosperity Indiana	Hoffman	12/25	
10	Maintain seat on United Way of Allen County public policy committee	Hoffman	12/25	
11	Maintain CEO lobbyist designation	Hoffman	12/25	
12	<i>Support specific advocacy efforts through communication, testimony, mobilization, etc.</i>	Hoffman	Ongoing	