



NORWESCAP

Creating Opportunities. Changing Lives.

STRATEGIC PLAN

2020-2023

ABOUT NORWESCAP

Norwescap is a private, nonprofit corporation, established in 1965, serving the low and moderate income populations in Northwest New Jersey. We offer a comprehensive array of strategies, programs and services to create opportunities and change lives.

Norwescap is deeply rooted in the communities we serve. We are a pillar of support in the community for those living in poverty and those that are one medical diagnosis, car repair or layoff notice away from economic hardship. Norwescap addresses six critical domains or service areas: Education, Employment, Financial Empowerment, Health & Nutrition, Housing & Community Development and Volunteerism. This multi-pronged approach helps us deliver real and measureable impact for our program participants and the communities we serve.

Norwescap currently employs over 260 people, annually serving some 30,000 people with a budget of just over \$16,400,000. Our financial impact is even greater than those numbers would suggest. Our \$16.4 million budget helps to leverage between \$12,000,000 and \$14,000,000 in direct funds to individuals in the form of child care vouchers, scholarships, heating assistance and rental assistance. This brings Norwescap's investments in Hunterdon, Warren, Somerset, Morris and Sussex counties to \$30,000,000. These investments, according to several national studies, produce a return on investment of over \$80,000,000 through public benefits and reduced social services costs.

We are grateful to our Board, staff, program participants, donors, volunteers and other stakeholders who provided us with input on this plan to help us create opportunities and change lives.

NORWESCAP STRATEGIC PLANNING REPORT

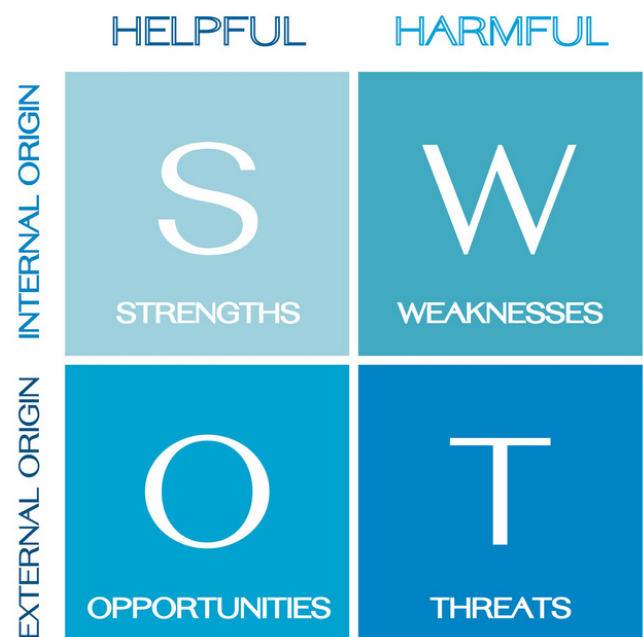
Norwescap launched its strategic planning process with the intent of creating the blueprint for the organization's direction over the next 3 years. With the support of a retired veteran nonprofit CEO who had overseen several strategic plans, Norwescap developed a process to gather data and input from multiple key stakeholders including: business leaders; program participants; staff; and partners. There were five phases to the creation of the strategic plan.

PHASE I: STRATEGIC PLANNING STEERING COMMITTEE

A Strategic Planning Steering Committee of 10 members was formed to guide the process and included representation from key stakeholder groups and from each of the counties served by Norwescap. The committee included the CEO as convener, three Norwescap Board members, and three Norwescap staff, along with program participants, and other partners. The Committee was provided with general data relevant to Norwescap's work and its service area. The Committee decided on the process, timeline and vision for the plan, and reviewed a written summary of the accomplishments of the last strategic plan. The initial SWOT analysis (Strengths, Weaknesses, Opportunities & Threats) was performed by the Steering Committee.

PHASE 2: STAKEHOLDER INTERVIEWS

Following the formation of the Steering Committee, Norwescap began a series of interviews with key stakeholders from around Norwescap's five-county service area. These stakeholders included donors, partners, business and community leaders. The interviews followed a format to elicit feedback that would align with data collected from a traditional SWOT analysis.



PHASE 3: FOCUS GROUPS

Utilizing a professional facilitator, Norwescap set up focus group meetings in each of the five counties served by Norwescap. The focus groups were divided into two separate tracts: internal stakeholders (Norwescap staff); and, external stakeholders (participants & partners). These sessions followed a SWOT analysis format, although the external stakeholder format was more open-ended.



PHASE 4: DATA ANALYSIS & DRAFT PLAN

Staff summarized and analyzed the feedback and information gathered and drafted the first round of recommendations. This was presented to the Steering Committee for further input and review. Additional data was collected through the agency's Community Needs Assessment process that was integrated into the focus group feedback. This included demographic data from public sources relevant to each of Norwescap program domains. Norwescap staff also prioritized the identified needs based on 1) perceived level of need; and, 2) Norwescap's ability to address that need.

PHASE 5: PUBLICATION OF FINAL PLAN

The final draft of the plan was presented to the Norwescap Board of Trustees for approval. The will be published and distributed widely via multiple media to funders, program participants, staff members, community partners, public policy leaders, and other key stakeholders.

The plan is a living, breathing document that should be reviewed quarterly to determine progress on achieving its goals and objectives. It should be adjusted from time-to-time as different priorities arise and as it becomes clear that some goals or objectives are either achieved or no longer relevant or a high priority for the organization.

The following pages represent a summary of the findings from the data collection phase of the plan.

I. WHAT ARE NORWESCAP'S STRENGTHS?

A. DEDICATED STAFF

Norwescap is strong because of our employees. Norwescap has a team that is dedicated, empowered, professional and passionate. We have incredible retention and longevity with many staff serving Norwescap for multiple decades. Our team has a vast amount of knowledge, experience, qualifications and education. Our team members are resilient, resourceful, persistent and creative. Norwescap has been nationally recognized as an excellent place to work by Nonprofit Magazine. Norwescap is known for providing excellent benefits for employees including; great time off, health insurance, flexible scheduling, and opportunities for growth. The team has good rapport, works well together, and welcomes new team members. We have leadership that is innovative, supportive, open-minded, flexible, visionary and empowers our teams to do work with little micro-management and shared leadership. In focus group sessions, Norwescap participants praised Norwescap employees as well-prepared, friendly and attentive.



B. EXCELLENT CUSTOMER SERVICE

Norwescap is strong because we provide excellent customer service to our participants. Our team is friendly, courteous, welcoming, open and respectful of our participants, intentionally building good rapport and valuing their perspectives. Our participants trust us as we provide programs that cover the

lifespan from birth to elderly. We treat clients with respect for their circumstances and seek to understand their needs. Norwescap helps our participants not just develop self-sufficiency, but thrive. Program participants reported that they felt their input was solicited and they were treated with dignity and respect. Parent & participant engagement (via meetings or other venues) allowed them to share experiences, learn, network, build friendships, and learn from other Norwescap programs and services.

C. EXTENSIVE REACH & EXPERIENCE

Two of Norwescap's key strengths are its broad footprint and long history. Norwescap is well-located in five counties and has built a great reputation over 50 years of service. We are noted for our expertise and live on the cutting-edge of national issues like immigration, community development, aging and childcare. We have a strong and growing presence on Facebook and social media. Norwescap successfully serves 1000's of clients annually and manages over 80 programs. We are fiscally sound and have great name recognition across our region as a whole. Participants reported feeling so strongly about the organization that they wanted to be engaged in providing outreach to their communities about Norwescap and the services they provide and wanted more comprehensive understanding of Norwescap services.

D. POWERFUL RESULTS

Norwescap is strong because its programs are successful. Many of Norwescap's programs are evidence-based and are well-established. Participants reported feeling strongly that Norwescap made a significant impact on them and their families and could identify many of the specific programs that helped them including energy assistance (LIHEAP) and Head Start. Participants felt that Norwescap saved them thousands of dollars on childcare costs and provided them with high quality child care options. Many utilized and valued home-based services. They also felt that Norwescap helped them build their capacity (e.g. inner strength, various skills) to become successful in their personal and professional goals. Skills that Norwescap helped clients improve include: job & career search skills; accessing basic needs (full stomach); building a network ('forever friends'; '2nd family'); personal financial skills; navigating systems like college admissions, social services and other bureaucracies.

E. STRATEGIC PARTNERSHIPS

Norwescap has built great partnerships that are critical to expanding its impact. Norwescap has good relationships with grantors, both programmatically and fiscally. We collaborate well with other organizations and programs, enabling us to make referrals and conduct community outreach easily.



II. WHAT OPPORTUNITIES/GAPS EXIST FOR NORWESCAP?

A. EXPAND INNOVATION

Norwescap has the opportunity to expand its impact through innovation. Norwescap has the opportunity to take more risks and not just play it safe. We can talk more about the future, try new things, and encourage innovation at the staff level. Staff suggested that we collect better data on effectiveness of programs, provide on-line applications to screen individuals prior to an appointment and utilize technology (texting and tablets) to extend and improve services.

B. ESTABLISH ONE STOP SHOP APPROACH

By better integrating Norwescap's multitude of programs, we have the opportunity to provide more coordinated customer service. Norwescap could improve services and service delivery through greater program collaboration and coordination. This would be facilitated by establishing a centralized database and the establishment of one application for all programs. It could also include a 'case-management' style approach so that any participant has a point of contact that can help link them to other services. Staff also suggested that we distribute customer satisfaction surveys to assess our effectiveness and drive improvement. We have the opportunity to include clients in decision-making processes and could advocate more for people who presently do not qualify for services. This would require that we improve communication with our participants. In addition, Norwescap could work to ensure that we are accessible to all people, including those with disabilities and populations with language barriers. Few participants know all the different areas of programming that Norwescap provides, and many only know about the specific program they participate in. A common suggestion from participants was for each participant to have one Norwescap staff member to help connect them to a comprehensive set of services that would meet ALL of their individual or family needs.



C. INCREASE EMPLOYEE SUPPORT

While Norwescap has won national recognition for its employee-friendly reputation, we have the opportunity to improve the experience for our employees. Norwescap could provide better compensation for staff with parity of pay. Improvements to the EAP system (mental health support) would also be welcomed as would medical benefits for all staff (i.e. include part-time staff). We could enhance our professional development and cross-training for staff to include how to deescalate conflict. Norwescap should focus on recruiting, maintaining and retaining a highly-qualified staff. Wellness activities like mental breaks, yoga, breaks during the work day would further support staff members. The team wants to see the return of the Personnel Committee and employee orientation. Staff also suggested that that Norwescap needs more staff overall and has too many part-time staff with some feeling over-worked with few/no incentives or effective recognition.

D. ADD MORE BILINGUAL STAFF

Norwescap should expand the number of bi-lingual staff it employs. With a growing Spanish-speaking population, participants expressed that more bi-lingual staff were needed to communicate effectively with Spanish-speaking individuals and communities. This will help expand/improve both outreach and service delivery.



E. INCREASE FUNDRAISING

Norwescap has the opportunity to improve our financial stability and flexibility through a comprehensive, agency-wide fundraising effort. Norwescap needs to aggressively seek unrestricted funds. The organization should pursue corporate and foundation support, bigger funding opportunities, expanded individual support including family foundations and estate planning and use the funding to fill service gaps and innovate.



F. ENHANCE BRANDING AND MARKETING EFFORTS

Norwescap has the opportunity to build its brand. In some counties (e.g. Somerset, Hunterdon), Norwescap is not well-known as a single organization, with people more likely to identify with its component programs like, the Food Bank, WIC or Head Start. In some areas, many potential participants do not know we exist. Most participants get to know us by word of mouth. We need to increase our identity (brand) as one entity (Norwescap) as opposed to multiple smaller entities (i.e. Head Start, WIC or Foodbank). This could be accomplished by developing clear branding guidelines, creating marketing materials, training staff in media relations and marketing, or partnering with schools to provide information. We could also expand our use of website, social media, billboards, electronic media or do more outreach to other agencies and collaborate with local governments to increase awareness and presence of the organization and its strategies.



G. EXPAND WHAT WORKS

Norwescap should expand existing services that have a proven track record of success. Not every Norwescap program or service is provided across the entire Norwescap service area and not every program has extended hours to meet the demands of individuals and families with busy schedules. Participants expressed expanding Pathways to Prosperity to other locations, providing more certificate programs, expanding the number of Head Start slots, increasing savings match (IDA), expanding child care options, and other expansions of existing programs. Several participants requested extended hours for programs like WIC, Head Start, parenting classes, and job/career readiness. Norwescap should explore ways to expand existing services.

H. BROADEN PROGRAM ELIGIBILITY

Participants want more flexibility for eligibility. Many participants feel that eligibility requirements are unrealistic, unnecessarily strict, or in conflict with other program requirements. For example, to qualify for child care subsidies you need to work a certain number of hours, but the income from that work may disqualify you for a housing subsidy. In other cases, nutritional support for new mothers only lasts six months, but they may be breast feeding their child for a year or more. Norwescap should explore ways to help navigate these eligibility barriers including raising unrestricted funds and advocating for public policy changes.



III. SPECIFIC PROGRAM RECOMMENDATIONS

A. GROW FINANCIAL EMPOWERMENT SERIES

Norwescap should expand & promote its empowerment building programs. Many participants were unaware of Norwescap's empowerment building programs such as IDA, VITA and Family Loan. Many expressed a desire to participate in these kinds of programs. Norwescap should explore expanding these programs to reach more people and promoting them better.





B. EXPAND EMPLOYMENT & SKILL BUILDING

Many participants and staff expressed a need for more support in the area of career readiness (resume writing, job search) and skill building (computers, English as a second language, technical certificates, etc.). There is also a need to promote job openings and help navigate various employment systems. Norwescap should explore how to expand and grow its programs in these areas.

C. PROVIDE MORE ACCESS TO QUALITY CHILDCARE & HEADSTART PROGRAMS

Despite expansion of early childhood education programs across the State and thankfulness for what Norwescap offers, there were still gaps in high quality preschool offerings identified by parents and Norwescap staff. Issues including half-day kindergarten, need for preschool wrap-around programs, support for early childhood literacy, afterschool and summer programs and increased Head Start/Early Head Start enrollment opportunities were identified as challenges that could present Norwescap with opportunities to expand services.

D. EXPAND PARENTING SKILLS TRAINING

The need for more parent support and parenting skills training was an area that many participants requested. This is an area of expertise for Norwescap and an opportunity for growth. Participants expressed that home visiting programs were highly valued. Norwescap should build on its existing programs to expand parent supports.



E. BROADEN NUTRITIONAL SUPPORT

Information and support to provide more nutritional food to families was raised by parents and prioritized by staff. Norwescap should explore ways to share more information and access to food pantries and non-processed food.

F. PROVIDE GREATER ACCESS TO MENTAL HEALTH SERVICES

In every focus group meeting, the lack of support for mental health issues arose. Data on suicide and drug-related deaths suggest the urgent nature of this support. Norwescap should consider ways to expand/improve support for participant mental health either through training of existing staff, creation of new programs or linkage/referrals to existing mental health provider organizations.

G. INCREASE AFFORDABLE HOUSING

The lack of affordable housing was a common theme in each focus group with both participants and Norwescap staff. It is also a salient feature in the public data. Participants described having to make a choice between housing and health care, childcare or needing additional support to pay rent, utilities or repairs. Norwescap should explore ways to provide more affordable housing options and supports for individuals and families.

IV. NEW STRATEGIES & SERVICES

A. GROW TO ADDRESS UNMET NEEDS

Norwescap has the opportunity to expand services into new areas where there is need. Norwescap could expand the services we provide to support participants from ages 0-100 (currently there are gaps in services for school-aged kids) and expand services across the state. We could expand programs and services to ensure more even distribution across the five counties. There were several needs identified in the focus groups that fell outside of existing Norwescap services. Across all counties, two of these key issues were transportation and mental health. Other areas mentioned were: youth services, aging services, support for immigrants, opioid use, animal food security, disaster response, veterans, social entrepreneurship and adding a food pantry to the food bank. This could include building better relationships with other agencies to address these needs.

B. EXPLORE OPPORTUNITY TO ENHANCE TRANSPORTATION

Transportation is a major hurdle for families and individuals seeking Norwescap program support. Transportation to programs and services was repeatedly cited as a major issue for the population that Norwescap serves. Norwescap should explore ways to improve transportation options for participants.

C. SERVE IMMIGRANTS

Norwescap should expand services to support recent immigrants. This area emerged in every meeting. Many recent immigrants aren't seeking services for fear of deportation for themselves or other family members. In other cases, undocumented residents don't qualify for many Federal programs. Lastly, language and cultural differences often impede or deter a participant from gaining access to support. Norwescap should explore ways to improve engagement of immigrant communities.

D. PROMOTE AFFORDABLE HEALTHCARE OPTIONS

Many participants raised concerns about lack of access to quality, affordable health care services. This was particularly acute for families in immigrant communities who cannot qualify for health insurance or are afraid to seek support. Opioid addiction and related services were a specific area identified at each meeting. Norwescap should explore ways to support increasing access to quality affordable health insurance.

V. ASPIRATIONS

A. BECOME GO-TO LEADERS IN OUR FIELD

Norwescap aspires to be the 'go-to' agency for information about the impact of poverty, low-income populations and other issues related to our areas of expertise. Norwescap should be the first phone call made by media outlets, public policy leaders, government entities, academics, corporations or other influencers when they need information on issues related to poverty and northwest New Jersey. Norwescap should position itself to be the first agency in our region that people turn to for help. We can be a think tank and thought-leader where other non-profits come to learn, partner and grow. We could innovate in numerous ways like creating a Norwescap app, establishing Norwescap University or the Bank of Norwescap, or even opening community/youth centers (with pools).



B. BE THE BEST PLACE TO WORK

We aspire to make Norwescap the best place to work ... anywhere. Norwescap could become the number one employer in our region, a place where everyone wants to work. We could give higher salaries and living wages with cost of living adjustments and bonuses for all workers. We could expand continuing education and professional development opportunities for all staff. Norwescap could add employee perks including free onsite and/or offsite gym memberships for all staff, free childcare for employees on site, and employee parking spots. Norwescap could also have a cafeteria with a chef. We could host more team building opportunities that are fun and creative and establish agency recreation leagues (e.g. softball).



**BEST
PLACE
TO
WORK**

C. EXPAND OUR FOOTPRINT

We aspire to expand our footprint. Norwescap could expand to other counties (even all 21 counties) and establish other locations or multiple headquarters, that could include moving headquarters to Morris or Somerset County where populations are larger and where many major corporations are located. This could also include simply building Norwescap's name recognition and reputation beyond our footprint through participation on State-wide advisory boards, panels, public testimony, media, publications, poverty simulations and other opportunities.

D. REVOLUTIONIZE CUSTOMER EXPERIENCE

We aspire to revolutionize customer service for our program participants. Norwescap could expand our services to 24-7 by utilizing technology. We could have a unified space for each county that would allow for one-stop shopping. Staff would like these to be new, modern facilities fully staffed.

E. INCREASE ELIGIBILITY FLEXIBILITY

We aspire to serve beyond the boundaries of our grants. Norwescap could provide resources to all populations regardless of income or other eligibility limitations. We could have bigger budgets for all our programs with greater amounts of unrestricted funding.

F. ADDRESS BIG & PERSISTANT ISSUES

We aspire to solve persistent problems... like transportation and homelessness. Norwescap could create "Norwescap on Wheels" or an Uber/Lyft for participants. Norwescap could open a homeless shelter, transitional housing or help build low-income housing. We could also use our influence to help change public policies on these intractable issues through advocacy and civic engagement.



NORWESCAP



GROWTH

GOALS & OBJECTIVES



EDUCATION

At Norwescap, we believe everyone should have access to high-quality educational opportunities and experiences.

OBJECTIVE 1.

Expand access to high-quality, affordable early childhood education for 1600 children annually through Norwescap Head Start and CFRS programs.



EMPLOYMENT

At Norwescap, we believe everyone in our community should be able to find a high-quality job that provides a living wage.

OBJECTIVE 1.

Expand employment readiness programming to annually prepare 150 unemployed or under employed people for employment or career advancement.

OBJECTIVE 2.

Expand technical skills training and certification opportunities for 60 adults annually.



FINANCIAL EMPOWERMENT

At Norwescap, we believe everyone needs to build savings and make investments that can help them move ahead in life.

OBJECTIVE 1.

Build Norwescap's capacity to deliver high quality financial empowerment programming and expand participation in financial capacity building programs by 50% from 2019 through 2022.

OBJECTIVE 2.

Create a 'Financial Empowerment Advisory Committee' to gain insight from, and build stronger partnerships with financial institutions and other partners, by August 2021.



HEALTH & NUTRITION

At Norwescap we believe that everyone needs access to healthcare and nutrition as well as support to maintain healthy behaviors.

OBJECTIVE 1.

Expand access to existing health related services by 5% annually through 2022 through better coordination health programs, such as WIC and CEED, to maximize benefits for participants.

OBJECTIVE 2.

Expand capacity to connect participants with behavioral health services by building partnerships with a minimum of 1 behavioral health provider in each county and providing staff training that leads to 50 behavioral health referrals annually.

OBJECTIVE 3.

Build strong referral partnerships with at least 1 substance abuse treatment provider in each county served by Norwescap.



HOUSING & COMMUNITY DEVELOPMENT

Norwescap believes that everyone deserves a safe and affordable home and a safe and thriving neighborhood for their family.

OBJECTIVE 1.

By 2022, expand available affordable housing by three units for low/moderate income families through active participation in Neighborhood Revitalization Tax Credit (NRTC) and other programs.

OBJECTIVE 2.

Expand investments in neighborhood revitalization efforts through NRTC, BCJI, NPP, Weatherization and other programs resulting in investment of \$200,000 in community development and housing related projects in Phillipsburg and Sussex Boro annually, starting in 2022.

OBJECTIVE 3.

Rebrand Sussex Seniors by December 2020 to be inclusive of community and cultural programming by expanding existing Norwescap services to 100 local residents annually.



VOLUNTEERISM & CIVIC ENGAGEMENT

Norwescap believes that everyone should have the opportunity to contribute to our communities.

OBJECTIVE 1.

Increase the number of volunteers over 2019 levels by 10% by the end of FY 2022.

OBJECTIVE 2.

Train 100 participants, beginning in 2020, annually in advocacy strategies/campaigns to increase vital services (i.e. transportation, afterschool programs, mental health services, affordable housing).



OPERATIONS & SYSTEMS

Norwescap will both expand its service levels and improve its outcomes for participants. It will accomplish this with improvements and changes in internal processes, practices and technology with a focus on utilizing data and focusing on outcomes.

OBJECTIVE 1.

Norwescap will increase its private fundraising capacity, (dollars raised) over 2019 levels, by 10% by the end of FY 2022.

OBJECTIVE 2.

Norwescap will implement a universal intake and assessment process across all agency locations and services to streamline services, track valuable data and improve customer service by 2022.

OBJECTIVE 3.

Norwescap will expand professional development opportunities for staff to a minimum of 10 hours/year.

OBJECTIVE 4.

Norwescap will increase the number of bi-lingual staff and language-related training opportunities to ensure that every operational location has access to bi-lingual staff members by 2021.

OBJECTIVE 5.

Norwescap will expand social media engagement over 2019 efforts, as measured by the number of 'likes', 'shares' and 'followers' by 20% annually through 2022.

OBJECTIVE 6.

Norwescap will expand participation in its existing programs by 10% by FY 2022.

OBJECTIVE 7.

Norwescap will host at least one conference of 200 participants by 2022.

OBJECTIVE 8.

Implement customer service guidelines that help achieve a 95% customer satisfaction rate as defined by rating of either 4 (satisfied) or 5 (very satisfied) on the question of 'I am satisfied with the service that Norwescap has provided me,' by 2022.

OBJECTIVE 9.

Norwescap will establish at least one location providing multiple services in each county as an effort to encourage cross-program integration by 2022.

OBJECTIVE 10.

Norwescap will develop a facilities plan to identify and prioritize facilities projects/investments by January 1, 2021.

OBJECTIVE 11.

Norwescap will develop a technology plan to identify and prioritize investments and strategies in maintaining and improving technology by January 1, 2021.



SET
GOAL

MAKE
PLAN

GET
TO
WORK

STICK
TO IT

REACH
GOAL



NORWESCAP LEADERSHIP



Mark Valli, *Chief Executive Officer*



Patrick Grogan, *Chief Operations Officer*



Edmund Khanoo, *Chief Financial Officer*



Chris Kirk, *Chief Program Officer*



Jessica Hoffman, *Program Officer*



Stephen Schanowolf, *Director of Information Technology*



Kasia McManamon, *Communications and Events Manager*



Maritza Baakman, *Executive Secretary*

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