

COMMUNITY AGENCY ORIENTATION WORKSHOP

City of Winston-Salem FY 2020-21 Community Agency Funding Process

Orientation Workshop

October 24, 2019



Winston-Salem

OVERVIEW

- I. Welcome and Introductions
- II. Public Hearing – Federal Housing Funds
- III. FY 2020-21 Application Process
 - RFP, Eligibility, Funding Sources, Online Application
- IV. Review Process
- V. Important Dates
- VI. Questions



PUBLIC HEARING

Winston-Salem/Forsyth County Housing Consortium
Consolidated Housing and Community Development Plan



I. Program Overview and Outlook

- Mellin Parker, Community Development

II. Status of Program Activities

- See Handout

III. Comments, Questions, & Answers

- Marla Newman, Community Development



FISCAL YEAR 2020-21 APPLICATION PROCESS INFORMATION



Winston-Salem

FY 2020-21 Request for Proposals

- RFP and application for funding during the period from July 1, 2020 to June 30, 2021
- Information and links to the RFP and application can be found on the Budget Department's website:
<http://www.cityofws.org/180/Contributions-to-Non-Profit-Entities>
- Online application portal to submit proposals:
<https://portal.neighborlysoftware.com/winston-salem/participant>
- Applications due Friday, November 22, 2019 by 5:00 pm



ELIGIBILITY REQUIREMENTS

- Application complete and responsive
- Activity eligible under one of the available funding sources
- Current nonprofit 501(c)(3) tax exempt status and eligibility to receive tax deductible contributions, as confirmed by the Internal Revenue Service
- “Current-Active” status to conduct business in the State of North Carolina at least one year prior to the date of publication of this Request for Proposals, as confirmed by the N.C. Secretary of State (<https://www.sosnc.gov/search/index/corp>)



ELIGIBILITY REQUIREMENTS

- Not be debarred or suspended by any federal agency
- Financial Review/Audit Requirement
 - Submission of third-party review or audited financial statements prepared by a qualified accountant or accounting service covering the last reporting period of operation. Audit findings may make the applicant ineligible to receive assistance from the City.
- Federal Housing Funding – Audit Requirements



ELIGIBILITY REQUIREMENTS

Your completed application should also include:

- Current list of Board Members
- Completed IRS 990 form (or 990-N if applicable)
- Organization policies (personnel, formal non-discrimination, procurement, etc.)
- Code of conduct
- Bylaws
- Articles of Incorporation

These will all be uploaded in
Section F – Required Documents

SEED FUNDING

- Purpose:
 - Broaden city financial assistance to increase the capacity of local non-profits to meet the community's needs
- Available to agencies that do not meet eligibility requirements for established funding process
- Short-term: limited to 2 funding cycles
- Requirements
 - Capacity building training
 - Reporting



FUNDING SOURCES

- Community Development Block Grant (CDBG)
- HOME Investment Partnership (HOME)
- Emergency Solutions Grant (ESG) and Homeless Management Information Systems (HMIS)
- Housing Finance Assistance Fund (HFF)
- Occupancy Tax
- General Fund
- Successful Outcomes After Release (SOAR)



FUNDING SOURCES (Continued)

Community Development Block Grant (CDBG)

- Activities benefit low and moderate income individuals
 - Decent affordable housing
 - Services and facilities
 - Create jobs



HOME Investment Partnership (HOME)

- Affordable housing projects and programs
 - Buying, building, or rehabilitating affordable housing
 - Rental or homeownership
 - Rental assistance
 - Activities benefit low-income individuals



FUNDING SOURCES (Continued)

Emergency Solutions Grants (ESG) and Homeless Management Information Systems (HMIS)

- Funding for programs to serve the homeless
 - Emergency shelters and supportive services
 - Rapid re-housing



FUNDING SOURCES (Continued)

Housing Finance Assistance Fund (HFF)

- Buying, building, or rehabilitating affordable housing
- Other public services



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FUNDING SOURCES (Continued)

Occupancy Tax

- Tourism promotion
- Tourism related expenditures such as festivals and events

General Fund

- Community arts and sciences agencies
- Broad-based support, city-wide



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FUNDING SOURCES (Continued)

Successful Outcomes After Release (SOAR)

1. City Job Training/Placement Program
2. Grantee Agency Funding
 - Educational, vocational, therapeutic, and employee training programs
 - Specifically for programs serving formerly incarcerated individuals
 - Programs that reduce recidivism



FY 2020-21 APPLICATION

Information and links to the RFP and application can be found on the Budget Departments website:

- <http://www.cityofws.org/180/Contributions-to-Non-Profit-Entities>

Online application portal to submit proposals:

- <https://portal.neighborlysoftware.com/winston-salem/participant>

Section A – Organization & Contact Information

Section B – Project Overview

Section C – Strategy and Performance

Section D – Organizational Capacity

Section E – Cost Effectiveness

Section F – Required Documents



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FY 2020-21 APPLICATION (Continued)

For Community Development Proposals ONLY
(CDBG, HOME and/or ESG funding):

Section G – Community Development Only

Section H – Construction/Rehab Only

Section I – Emergency Shelter Only

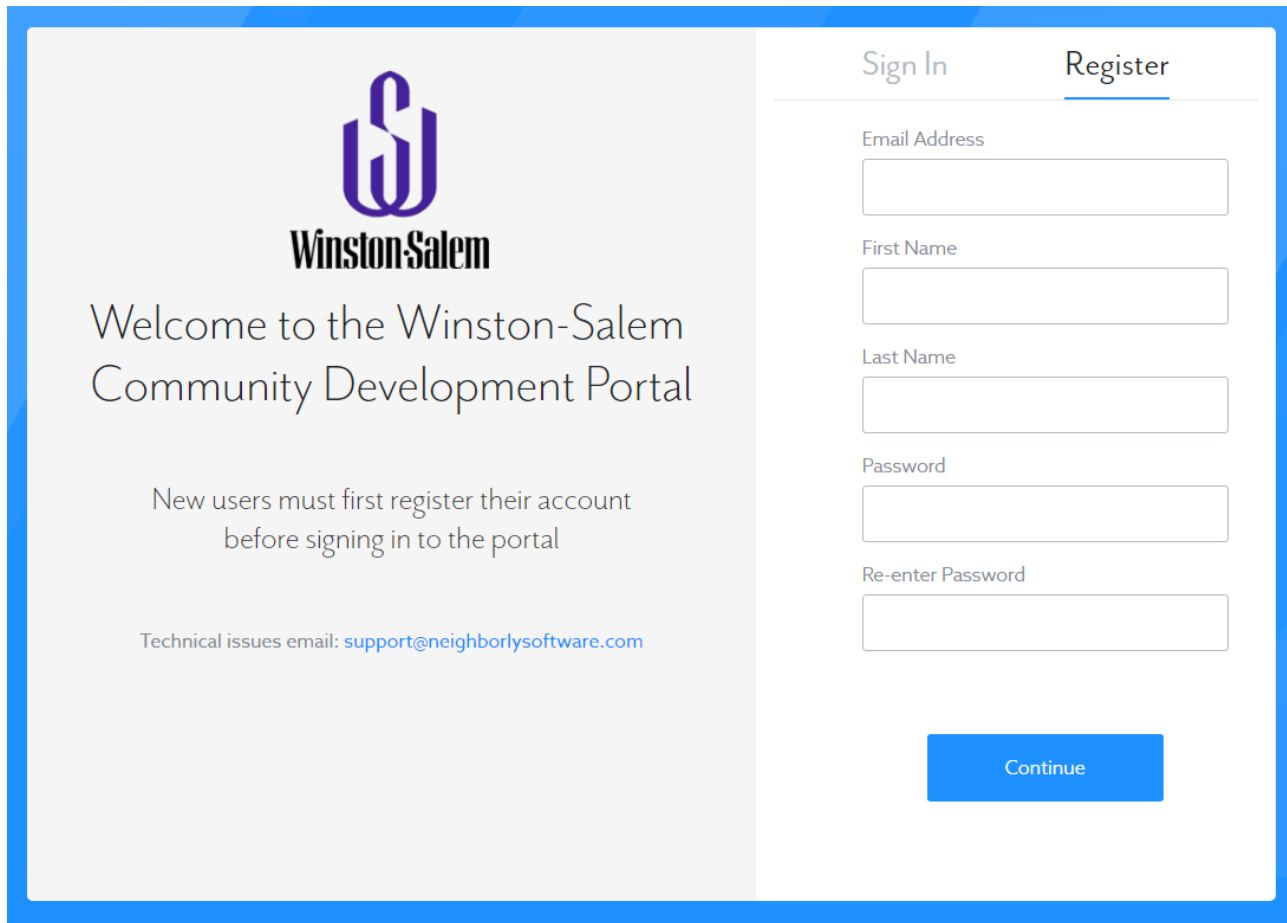
Section J – Rapid Rehousing and HMIS Only



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FY 2020-21 APPLICATION (Continued)

- Register to access your organization's application
- <https://portal.neighborlysoftware.com/winston-salem/participant>



The screenshot shows a web page for the Winston-Salem Community Development Portal. On the left, there is a logo consisting of a stylized 'W' and 'S' intertwined, with the text 'Winston-Salem' below it. Below the logo, the text reads 'Welcome to the Winston-Salem Community Development Portal'. Further down, it says 'New users must first register their account before signing in to the portal'. At the bottom left, there is a link for technical issues: 'support@neighborlysoftware.com'. On the right side of the page, there are two tabs: 'Sign In' and 'Register', with 'Register' being the active tab. Below the tabs are five input fields: 'Email Address', 'First Name', 'Last Name', 'Password', and 'Re-enter Password'. At the bottom right of the registration form is a blue button labeled 'Continue'.

FY 2020-21 APPLICATION (Continued)

- Sign in and find “Community Agency Funding.”
- Select “Click here to start a new application”

Good Morning, Sarah!

Start a New Application

Community Agency Funding	Select this option if you are a non-profit applying for Community Agency funding.	Click here to start a new application
Owner Occupied Rehab	Select this option if you are a homeowner applying for Winston-Salem's Owner Occupied Rehabilitation program.	Click here to start a new application
Down Payment Assistance	Select this option if you are applying for down payment assistance.	Click here to start a new application



FY 2020-21 APPLICATION (Continued)

- Click through sections on the left menu to complete the application



Home

Community Agency Funding Application

- A. Organization & Contact Information
- B. Project Overview
- C. Strategy and Performance
- D. Organizational Capacity
- E. Cost Effectiveness
- F. Required Documents
- G. Community Development Only
- H. Construction/Rehab Only
- I. Emergency Shelter Only
- J. Rapid Rehousing Only
- Submit

[Print Application](#)

Application

Please use the link below to continue the application process.

Technical issues? Contact support@neighborlysoftware.com.

[Click here to continue](#)



FY 2020-21 APPLICATION (Continued)

- At the end of each section, click “Complete & Continue” to move to the next section
- As long as the application has not been submitted, you can reopen sections to change responses

Community Agency Funding Application

- A. Organization & Contact Information*
- B. Project Overview
- C. Strategy and Performance
- D. Organizational Capacity
- E. Cost Effectiveness
- F. Required Documents
- G. Community Development Only
- H. Construction/Rehab Only
- I. Emergency Shelter Only
- J. Rapid Rehousing Only
- Submit

Print Application

City Zip Code

A.7. Organization Website

A.8. Year 501(c)(3) status obtained


A.9. Organization Fiscal Year

A.10. Federal Tax ID Number

A.11. Federal DUNS Number

A.20. Email

No save history



FY 2020-21 APPLICATION – PERFORMANCE MEASURE TABLE

- Include at least three goals and performance measures
- One measure should include the number of unduplicated participants served

Stated Program Goals	Program Activities in Support of Goals	FY 18-19 Previous Year Actuals	FY 19-20 Current Year Projected	FY 20-21 Next Year Anticipated Results
Provide case management for low-income families to secure and maintain stable housing	Meet with clients weekly; assist with developing budget; address financial barriers	Served 45 families	Serve 50 families	Serve 55 families
Provide racial diversity education to all 9th grade students in Forsyth County	Teach monthly interactive workshops on racial diversity on a rotating basis	95% of Forsyth County students participated in a training	98% of Forsyth County students participate in a training	98% of Forsyth County students participate in a training
Decrease the number of violent incidents reported that involve counseled juveniles during counseling and the following six months	Provide weekly case management and behavioral counseling sessions, as well as educational programs for students	Total violent incidents decreased from average of 6 to 4 incidents	Total violent incidents decrease from average of 6 to 3 incidents	Total violent incidents decrease from average of 6 to 2 incidents
Encourage revitalization of downtown commercial district to create a thriving business district and community space	Arrange the purchase and development of vacant downtown storefront space for retail business	Purchased and developed 5,000 square feet of storefront	Purchase and developed 6,000 square feet of storefront	Purchased and developed 6,000 square feet of storefront
FY 18-19 Program Accomplishments:				
FY 20-21 Key Objectives:				



FY 2020-21 APPLICATION – PERFORMANCE MEASURE TABLE

- The RFP has additional information about types of performance measures in Exhibit A.

Stated Program Goals	Program Activities in Support of Goals	PERFORMANCE MEASURES		
		FY 18-19 Previous Year Actuals	FY 19-20 Current Year Projected	FY 20-21 Next Year Anticipated Results
<i>Example: At least 20 families in the program will maintain permanent housing for a minimum of 12 months</i>	<i>Case managers provide mentoring, budget counseling, employment assistance, and tutoring</i>	<i>18 families maintained housing for a minimum of 12 months</i>	<i>18 families will maintain housing for a minimum of 12 months</i>	<i>20 families will maintain housing for a minimum of 12 months</i>
<i>Example: Operate a museum attracting increasing numbers of visitors from the entire Triad region while recovering a reasonable portion of operating costs from visitor revenue</i>	<i>Provide rotating and permanent exhibits, educational programs for students, after hours events, and opportunities for diverse audiences to engage.</i>	<i>15% of visitors were from outside the City; Recovered 50% of operating cost from visitor revenue.</i>	<i>20% of visitors were from outside the City; Recovered 50% of operating costs from visitor revenue.</i>	<i>25% of visitors are from outside the City; Recover 60% of operating costs from visitor revenue.</i>
<ul style="list-style-type: none"> - Goals for each activity should express what the program/activity is designed to accomplish - Goals should be specific and relate to the program activities and performance measures in the next elements. 	<ul style="list-style-type: none"> - These are the activities or services provided by the organization to accomplish the stated program goals. 	<ul style="list-style-type: none"> - Provide measures that reflect your progress in accomplishing your stated program goals. Include measures such as: <ul style="list-style-type: none"> Workload Measures indicate the quantity of work completed by an organization. <ul style="list-style-type: none"> - Number of people served - Hours of counseling provided - Art inventory maintained and displayed Efficiency Measures indicate how productive an organization is at providing a project/program. <ul style="list-style-type: none"> - Cost to organization per person served - Revenue as a percent of total cost of operation - Cost to organization per workshop provided Effectiveness Measures indicate whether the activities of an organization are achieving the desired outcomes; or indicate the quality of service provided. <ul style="list-style-type: none"> - Percentage of public school students receiving two hours of racial diversity training - Number of case management clients maintaining housing after 6 months - Grade Point Average increase over prior semester 		
FY 18-19 Program Accomplishments:				
FY 20-21 Key Objectives:				



PERFORMANCE MEASURES 101



<https://youtu.be/2XdJFTBtSwk>

FY 2020-21 APPLICATION - BUDGET

Expenditures by Program	Budgeted FY 19-20	Projected Actuals FY 19-20	Proposed Budget FY 20-21
Program Services	800,501	815,122	865,120
Fundraising	650	650	650
Management and General	252,960	250,911	255,400
Total Expenditures (Should match Total Expenditures by Category)	1,054,111	1,066,683	1,121,170
Expenditures by Category	Budgeted FY 19-20	Projected Actuals FY 19-20	Proposed Budget FY 20-21
Employee Salaries and Wages	590,651	570,964	605,182
Employee Benefits	236,260	228,386	242,073
Facility Rent and Utilities	112,020	110,669	115,669
Training and Conference Registration	2,500	2,231	2,500
Memberships and Dues	2,750	2,750	2,750
Travel and Transportation	13,298	15,070	14,715
Grants To Individuals and Organizations	48,150	50,198	50,500
Contracted Fundraising Services	0	0	0
Goods Purchased for Resale	0	0	0
Other Contracted Services	30,150	32,800	34,765
Other Operating Expenditures	18,332	53,615	53,016
Capital Outlay			
Total Expenditures (Should match Total Expenditures by Program)	1,054,111	1,066,683	1,121,170
Revenues by Category	Budgeted FY 19-20	Projected Actuals FY 19-20	Proposed Budget FY 20-21
City of Winston-Salem	95,527	103,401	161,240
Forsyth County	48,381	42,989	67,563
State of North Carolina	0	0	0
Federal Government	352,623	369,459	392,588
Admissions / Program Revenue / Sales			

This breakdown of expenditures should come from your IRS Form 990.

Within each column, each of the "Total" lines must be equal.

APPLICATION SCORING

Total Possible Grant Application Score:

- Project Overview 20 points
- Strategy and Performance 20 points
- Organizational Capacity 20 points
- Cost Effectiveness 25 points
- Overall Impression 5 points
- All Materials Submitted 5 points
- Contemporary Bonus 5 points
- 100 points



APPLICATION REVIEW PROCESS

December 2019

- Review Panels

January – April 2020

- Community Agency Allocation Committee (CAAC) Review Meetings

April 2020

- Community Development/Housing/General Government Committee – Recommendations presented for Federal Housing Funds

May 2020

- City Manager's Proposed Budget for FY 2020-21 to Mayor and City Council

June 2020

- Mayor & Council approve budget, including allocations to community agencies



IMPORTANT DATES

- Technical Workshop
 - Provide application assistance and answer any questions
 - Thursday, November 7, 2:00 pm
 - Mazie S. Woodruff Center

- Application Deadline
 - Friday, November 22, 2019
 - No later than 5:00 p.m.
 - Submit application and all supporting documents online

<https://portal.neighborlysoftware.com/winston-salem/participant>



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RESOURCES

Budget Page (RFP and link to application):

<http://www.cityofws.org/180/Contributions-to-Non-Profit-Entities>

Online Application:

<https://portal.neighborlysoftware.com/winston-salem/participant>

Strategic Plan:

<http://www.cityofws.org/216/Strategic-Planning>

Performance Measures 101 Video:

<https://youtu.be/2XdJFTBtSwk>



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QUESTIONS



Winston-Salem

CITY OF WINSTON-SALEM CONTACTS

Budget and Evaluation Office

Sarah Coffey

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