COMMUNITY AGENCY ORIENTATION WORKSHOP

City of Winston-Salem FY 2022-23 Community Agency Funding Process Orientation Workshop
October 19, 2021
OVERVIEW

I. Welcome and Introductions
II. Public Hearing – Federal Housing Funds
III. FY 2022-23 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 L. Parker, Community Development

II. Status of Program Activities
   ▪ Speakers

III. Comments, Questions & Answers
   ▪ Mellin L. Parker, CD
City of Winston-Salem FY21 Expenditures

HUD Entitlement Expenditures
• Community Development Block Grant (CDBG): $1,918,380
• HOME Investment Partnership (HOME): $1,254,108
• Emergency Solutions Grant (ESG): $174,712

Other Federal Fund Expenditures: $2,022,490
Local Fund Expenditures: $2,564,164
COVID-Related Expenditures: $3,275,088

New Funding Sources for FY22
Housing Opportunities for Persons With AIDS (HOPWA): $710,304
HOME-ARP: $4,887,567
PUBLIC HEARING AGENDA: Program Overview and Outlook

$11,208,942 COMMUNITY IMPACT

Enclave II

Enterprise Center

Emanuel Retirement Village

Forsyth County, NC
PUBLIC HEARING AGENDA: Status of Program Activities

TODAY’S SPEAKERS

1. Fair Housing
   - Mr. Adolfo Briceno, HRD
2. Housing Rehabilitation
   - Ms. Deidre Pender, CD
3. Redevelopment & Housing Production
   - Ms. Diane Greer, CD
4. Economic Development
   - Mr. Steven Harrison, BIA
5. Forsyth County Housing Programs
   - Ms. Ashley Pendley, CED
6. Homeless Programs
   - Ms. Shereka Floyd, CD
7. Housing Authority
   - Mr. Kevin Cheshire, HAWS
8. Comments, Questions and Answers
   - Ms. Mellin L. Parker, CD

JULY 1, 2020 – JUNE 30, 2021 CAPER

- Annual progress report to HUD
- Details collective funding impact
- Narrative of progress toward five-year goal
- Summary of CAPER will be provided for download in the chat box during the Comments, Questions and Answers portion of the presentation
Please email any questions regarding the Public Hearing by 5:00 PM, October 22, 2021, to:

HCSD@CITYOFWS.ORG

The next public hearing will be held in March 2022.
FY 2022-23 Request for Proposals

- RFP and application for funding during the period from July 1, 2022 to June 30, 2023

- Information and links to the RFP and application can be found on the Budget Department’s website:
  [http://www.cityofws.org/335/Contributions-to-Non-Profit-Entities](http://www.cityofws.org/335/Contributions-to-Non-Profit-Entities)

- Online application portal to submit proposals:
  [https://portal.neighborlysoftware.com/winston-salem/participant](https://portal.neighborlysoftware.com/winston-salem/participant)

- Applications due Friday, November 19, 2021 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
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 Opportunities for Persons With AIDS (HOPWA)
- Housing Finance Assistance Fund (HFF)
- Occupancy Tax
- General Fund
- Successful Outcomes After Release (SOAR)
Community Development Block Grant (CDBG)

- Activities benefit low and moderate income individuals
  - Decent affordable housing
  - Services and facilities
  - Create jobs
COMMUNITY AGENCY ORIENTATION WORKSHOP

FUNDING SOURCES (Continued)

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
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
Housing Opportunities for Persons With AIDS (HOPWA)

- Activities benefit low and moderate-income individuals living with HIV/AIDS
  - Tenant-Based Rental Assistance (TBRA)
  - Short-Term Rent, Mortgage, and Utility (STRMU) Assistance
  - Permanent Housing Placement (PHP)
Housing Finance Assistance Fund (HFF)

- Buying, building, or rehabilitating affordable housing
- Other public services
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
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 2022-23 APPLICATION

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

- [http://www.cityofws.org/335/Contributions-to-Non-Profit-Entities](http://www.cityofws.org/335/Contributions-to-Non-Profit-Entities)

Online application portal to submit proposals:
- [https://portal.neighborlysoftware.com/winston-salem/participant](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
For Community Development Proposals ONLY (CDBG, HOME, HOPWA and/or ESG funding):

Section G – Social Serv/Poverty Reduction Only
Section H – Construction/Rehab Only
Section I – Emergency Shelter Only
Section J – Rapid Rehousing and HMIS Only
Section K – HOPWA Only
Register to access your organization’s application

- https://portal.neighborlysoftware.com/winston-salem/participant
FY 2022-23 APPLICATION (Continued)

- Sign in and find “Community Agency Funding.”
- Select “Click here to start a new application”
Click through sections on the left menu to complete the application

Application

Please use the link below to continue the application process.

Technical issues? Contact support@neighborlysoftware.com.

Click here to continue
FY 2022-23 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.
Include at least three goals and performance measures
One measure should include the number of unduplicated participants served

<table>
<thead>
<tr>
<th>Stated Program Goals</th>
<th>Program Activities in Support of Goals</th>
<th>FY 19-20 Previous Year Actuals</th>
<th>FY 20-21 Current Year Projected</th>
<th>FY 21-22 Next Year Anticipated Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide case management for low-income families to secure and maintain stable housing</td>
<td>Meet with clients weekly; assist with developing budget; address financial barriers</td>
<td>Served 45 families</td>
<td>Serve 50 families</td>
<td>Serve 55 families</td>
</tr>
<tr>
<td>Provide racial diversity education to all 9th grade students in Forsyth County</td>
<td>Teach monthly interactive workshops on racial diversity on a rotating basis</td>
<td>95% of Forsyth County students participated in a training</td>
<td>98% of Forsyth County students participate in a training</td>
<td>98% of Forsyth County students participate in a training</td>
</tr>
<tr>
<td>Decrease the number of violent incidents reported that involve counseled juveniles during counseling and the following six months</td>
<td>Provide weekly case management and behavioral counseling sessions, as well as educational programs for students</td>
<td>Total violent incidents decreased from average of 6 to 4 incidents</td>
<td>Total violent incidents decrease from average of 6 to 3 incidents</td>
<td>Total violent incidents decrease from average of 6 to 2 incidents</td>
</tr>
<tr>
<td>Encourage revitalization of downtown commercial district to create a thriving business district and community space</td>
<td>Arrange the purchase and development of vacant downtown storefront space for retail business</td>
<td>Purchased and developed 5,000 square feet of storefront</td>
<td>Purchase and developed 6,000 square feet of storefront</td>
<td>Purchased and developed 6,000 square feet of storefront</td>
</tr>
</tbody>
</table>

**FY 19-20 Program Accomplishments:**

**FY 21-22 Key Objectives:**
### FY 2022-23 APPLICATION – PERFORMANCE MEASURE TABLE

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

<table>
<thead>
<tr>
<th>Stated Program Goals</th>
<th>Program Activities in Support of Goals</th>
<th>FY 20-21 Previous Year Actuals</th>
<th>FY 21-22 Current Year Projected</th>
<th>FY 22-23 Next Year Anticipated Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: At least 20 families in the program will maintain permanent housing for a minimum of 12 months</td>
<td>Case managers provide mentoring, budget counseling, employment assistance, and tutoring</td>
<td>18 families maintained housing for a minimum of 12 months</td>
<td>18 families will maintain housing for a minimum of 12 months</td>
<td>20 families will maintain housing for a minimum of 12 months</td>
</tr>
<tr>
<td>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</td>
<td>Provide rotating and permanent exhibits, educational programs for students, after hours events, and opportunities for diverse audiences to engage</td>
<td>15% of visitors were from outside the City; Recovered 50% of operating cost from visitor revenue.</td>
<td>20% of visitors were from outside the City; Recovered 50% of operating costs from visitor revenue.</td>
<td>25% of visitors are from outside the City; Recover 60% of operating costs from visitor revenue.</td>
</tr>
</tbody>
</table>

- 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.

**FY 20-21 Program Accomplishments:**

**FY 22-23 Key Objectives:**

**PERFORMANCE MEASURES**

- Provide measures that reflect your progress in accomplishing your stated program goals. Include measures such as:

  **Workload Measures** indicate the quantity of work completed by an organization.
  - 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.
  - 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.
  - 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
Performance Measures 101

A Primer for Community Agency Orientation Workshop

https://youtu.be/2XdJFTBtSwk
## FY 2022-23 APPLICATION - BUDGET

### Expenditures by Program

<table>
<thead>
<tr>
<th>Program Services</th>
<th>Budgeted FY 21-22</th>
<th>Projected Actuals FY 21-22</th>
<th>Proposed Budget FY 22-23</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>800,501</td>
<td>815,122</td>
<td>865,120</td>
</tr>
<tr>
<td>Fundraising</td>
<td>650</td>
<td>650</td>
<td>650</td>
</tr>
<tr>
<td>Management and General</td>
<td>252,960</td>
<td>250,911</td>
<td>255,400</td>
</tr>
<tr>
<td><strong>Total Expenditures (Should match Total Expenditures by Category)</strong></td>
<td><strong>1,054,111</strong></td>
<td><strong>1,066,683</strong></td>
<td><strong>1,121,170</strong></td>
</tr>
</tbody>
</table>

### Expenditures by Category

#### Personnel

<table>
<thead>
<tr>
<th>Category</th>
<th>Budgeted FY 21-22</th>
<th>Projected Actuals FY 21-22</th>
<th>Proposed Budget FY 22-23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Salaries and Wages</td>
<td>590,651</td>
<td>570,964</td>
<td>605,182</td>
</tr>
<tr>
<td>Employee Benefits</td>
<td>236,260</td>
<td>228,386</td>
<td>242,073</td>
</tr>
<tr>
<td><strong>Subtotal, Personnel</strong></td>
<td><strong>826,911</strong></td>
<td><strong>799,350</strong></td>
<td><strong>847,255</strong></td>
</tr>
</tbody>
</table>

#### Operating Expenditures

<table>
<thead>
<tr>
<th>Category</th>
<th>Budgeted FY 21-22</th>
<th>Projected Actuals FY 21-22</th>
<th>Proposed Budget FY 22-23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility Rent and Utilities</td>
<td>112,020</td>
<td>110,669</td>
<td>115,669</td>
</tr>
<tr>
<td>Training and Conference Registration</td>
<td>2,500</td>
<td>2,231</td>
<td>2,500</td>
</tr>
<tr>
<td>Memberships and Dues</td>
<td>2,750</td>
<td>2,750</td>
<td>2,750</td>
</tr>
<tr>
<td>Travel and Transportation</td>
<td>13,298</td>
<td>15,070</td>
<td>14,715</td>
</tr>
<tr>
<td>Grants To Individuals and Organizations</td>
<td>48,150</td>
<td>50,198</td>
<td>50,500</td>
</tr>
<tr>
<td>Contracted Fundraising Services</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Goods Purchased for Resale</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Other Contracted Services</td>
<td>30,150</td>
<td>32,800</td>
<td>34,765</td>
</tr>
<tr>
<td>Other Operating Expenditures</td>
<td>18,332</td>
<td>53,615</td>
<td>53,016</td>
</tr>
<tr>
<td><strong>Subtotal, Operating Expenditures</strong></td>
<td><strong>227,200</strong></td>
<td><strong>267,333</strong></td>
<td><strong>273,915</strong></td>
</tr>
</tbody>
</table>

### Capital Outlay

<table>
<thead>
<tr>
<th>Category</th>
<th>Budgeted FY 21-22</th>
<th>Projected Actuals FY 21-22</th>
<th>Proposed Budget FY 22-23</th>
</tr>
</thead>
</table>

### Total Expenditures (Should match Total Expenditures by Program)

| Total Expenditures (Should match Total Expenditures by Program) | 1,054,111 | 1,066,683 | 1,121,170 |

### Revenues by Category

<table>
<thead>
<tr>
<th>Category</th>
<th>Budgeted FY 21-22</th>
<th>Projected Actuals FY 21-22</th>
<th>Proposed Budget FY 22-23</th>
</tr>
</thead>
<tbody>
<tr>
<td>City of Winston-Salem</td>
<td>95,527</td>
<td>103,401</td>
<td>161,240</td>
</tr>
<tr>
<td>Forsyth County</td>
<td>48,381</td>
<td>42,989</td>
<td>67,563</td>
</tr>
<tr>
<td>State of North Carolina</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Federal Government</td>
<td>352,623</td>
<td>369,459</td>
<td>392,588</td>
</tr>
<tr>
<td>Admissions/Program Revenue/Sales</td>
<td>17,552</td>
<td>15,233</td>
<td>17,986</td>
</tr>
<tr>
<td>Memberships</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Donations</td>
<td>154,680</td>
<td>162,977</td>
<td>164,987</td>
</tr>
<tr>
<td>Foundation Grants</td>
<td>188,633</td>
<td>137,645</td>
<td>118,145</td>
</tr>
<tr>
<td>Interest and Investment Income</td>
<td>644</td>
<td>621</td>
<td>659</td>
</tr>
</tbody>
</table>

This breakdown of expenditures should come from your IRS Form 990.
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 2021
- Review Panels

January – April 2022
- Community Agency Allocation Committee (CAAC) Review Meetings

April 2022
- Community Development/Housing/General Government Committee – Recommendations presented for Federal Housing Funds

May 2022
- City Manager’s Proposed Budget for FY 2020-21 to Mayor and City Council

June 2022
- Mayor & Council approve budget, including allocations to community agencies
IMPORTANT DATES

- Technical Workshop
  - Provide application assistance and answer any questions
  - Thursday November 4, 2:00 pm
  - Virtual through Zoom

- Application Deadline
  - Friday, November 19, 2021
  - No later than 5:00 p.m.
  - Submit application and all supporting documents online

https://portal.neighborlysoftware.com/winston-salem/participant
RESOURCES

Budget Page (RFP and link to application):
http://www.cityofws.org/335/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
### CITY OF WINSTON-SALEM CONTACTS

<table>
<thead>
<tr>
<th>Budget and Evaluation Office</th>
<th>Police Department - SOAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rene’ Williams</td>
<td>Dr. Pam Peoples-Joyner</td>
</tr>
<tr>
<td>(336) 747-7094</td>
<td>(336) 773-7962</td>
</tr>
<tr>
<td><a href="mailto:communityagencies@cityofws.org">communityagencies@cityofws.org</a></td>
<td><a href="mailto:pjoyner@wspd.org">pjoyner@wspd.org</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Community Development Department</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Shereka Floyd</td>
<td>Mellin L. Parker</td>
</tr>
<tr>
<td>(336) 734-1305</td>
<td>(336) 734-1310</td>
</tr>
<tr>
<td><a href="mailto:sherekaf@cityofws.org">sherekaf@cityofws.org</a></td>
<td><a href="mailto:mellinp@cityofws.org">mellinp@cityofws.org</a></td>
</tr>
<tr>
<td></td>
<td>Marla Y. Newman</td>
</tr>
<tr>
<td></td>
<td>(336) 734-1259</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:marlan@cityofws.org">marlan@cityofws.org</a></td>
</tr>
</tbody>
</table>

*For general questions about the ConPlan, please email [HCSD@cityofws.org](mailto:HCSD@cityofws.org), with the subject line: “CONPLAN QUESTIONS.”*