

A. Organization & Contact Information

Case Id: 14323
Name: Samaritan Ministries - City ESG - FY23 - 2022/23
Address: *No Address Assigned

Completed by jan.kelly@samaritanforsyth.org on 10/29/2021 3:14 PM

A. Organization & Contact Information

The Request for Proposals and additional materials to assist with completing the application can be found on the City's webpage for [Community Agencies](#)

A.1. Organization Name

Samaritan Ministries

A.2. Project/Program

Samaritan Inn - City ESG

A.3. FY 2022-23 Funding Request Amount

\$20,000.00

A.4. Agency's Total Operating Budget

\$1,616,051.00

A.5. Mailing Address

414 E. Northwest Blvd., Winston-Salem, NC 27105
Winston-Salem, NC 27105

A.6. Project/Program Location Address

414 E. Northwest Blvd., Winston-Salem, NC 27105
Winston-Salem, NC 27105

A.7. Organization Website

www.samaritanforsyth.org

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

1986

A.9. Organization Fiscal Year

July 1 - June 30

A.10. Federal Tax ID Number

A.11. Federal DUNS Number

EXECUTIVE DIRECTOR/MANAGER

A.12. Name, Title

Jan Kelly, Executive Director

A.13. Email

jan.kelly@samaritanforsyth.org

A.14. Phone

(336) 448-2665

CONTACT

A.15. Name, Title

Jan Kelly, Executive Director

A.16. Email

jan.kelly@samaritanforsyth.org

A.17. Phone

(336) 448-2665

BOARD CHAIR

A.18. Name

Lisa Parrish

A.19. Term Expiration

06/30/2022

A.20. Email

lisa.parrish@bhhs Carolinas.com

A.21. Phone

(336) 816-4839

Printed By: Rene Williams on 1/28/2022

B. Project Overview

Completed by jan.kelly@samaritanforsyth.org on 11/18/2021 9:55 AM

Case Id: 14323

Name: Samaritan Ministries - City ESG - FY23 - 2022/23

Address: *No Address Assigned

B. Project Overview

Please provide the following information.

APPROACH (7 POINTS)

B.1. Provide a concise description of the proposed project/program, indicating specifically how City funds will be used. Briefly, what are the goals/objectives of the project/program?

Samaritan Inn is a homeless shelter for 70 men, providing temporary emergency shelter for up to 90 days. Our request is for \$20,000 from City ESG to assist with shelter operating costs (food and utilities). Our goal is to provide over 24,000 nights of shelter to more than 600 different homeless men, and to move at least 80 guests to permanent housing. Samaritan is an active participant of a housing first model of moving guests out of the shelter as soon as possible with the support of the Community Intake Center. During the COVID-19 pandemic, Samaritan's shelter capacity has been reduced to 35 to allow for appropriate distancing recommended by the CDC and Forsyth County Health Department. Goals outlined in this proposal assume a return to capacity of 70 and a return to pre-pandemic conditions for the 2022-2023 year, though this is unknown at this time due to ongoing COVID concerns.

B.2. How will a participant access the proposed project/program, use the services, and derive a beneficial outcome from participation?

Samaritan Ministries' program models the five keys to effective emergency shelter from the National Alliance to End Homelessness. Samaritan is designed to be a safe, low barrier shelter which uses the housing-first and housing-focused approach, while assessing data to measure performance as required by HUD (Housing and Urban Development).

Samaritan operates a low barrier shelter, and admission is based on vulnerability. Guests who check in and obtain a bed may stay up to 90 days, with extensions for those with active housing plans and consideration of the pandemic. Guests must be 18+years old and male. Only three sex offenders are allowed in the shelter at any given time. Samaritan is the only shelter in the community allowed to accept sex offenders.

Samaritan Inn is open from 7:00 pm – 7:30 am, 365 nights a year. Samaritan is also open during the day during severe inclement weather (i.e., extreme cold). Check-in time may be scheduled earlier during weather events and cold winter temperatures. During the pandemic, shelter guests have been encouraged to remain inside during the day to limit their exposure to the virus. Samaritan does not normally provide day shelter on an ongoing basis but has done so since March 2020.

Samaritan understands that guests may face barriers to housing to overcome such as financial issues, evictions, credit history and trauma. We meet with guests at case review within 1-2 weeks of entering the shelter (1st and 3rd Wednesdays) to start a housing plan and then again at 90 days for an update. We allow extensions if needed, and case managers often provide letters, email and updates to request extensions for guests. These extensions are usually in 30-day increments.

The guests benefit, physically and emotionally, from having a safe place to sleep, away from inclement weather and in a

welcoming environment. Guests are encouraged to take steps to secure permanent housing through referrals and case management with Empowerment Project, City with Dwellings, Experiment in Self-Reliance and the Coordinated Intake Center.

B.3. Describe the unmet need that the proposed project/program seeks to address. Include data supporting the need.

Samaritan's guests have a lack of income and housing. One hundred percent of clients fall into the 0-30% of median income range. According to the 2021 Point in Time Count, 462 people are homeless on any given night in our community. Samaritan provides for the very basic needs of food (breakfast, lunch and dinner) and shelter for people experiencing homelessness.

COLLABORATION (6 POINTS)

B.4. Describe any specific collaborative relationships with other organizations (public or private) and how they will impact the project/program. How will collaboration contribute to the planning, implementation, operation, oversight, and performance measurement of the proposed project/program?

Samaritan staff are active participants in COC meetings, including operating cabinet, full council meetings, weekly COVID calls, assessment and diversion/prevention. Samaritan volunteers to be part of work groups, including COVID isolation, winter overflow and Built for Zero bottleneck groups on mental health, increasing connections to wrap around services and lack of affordable housing. Because many homeless people eat lunch at Samaritan daily, it is a convenient location for case managers to meet clients. Through COC collaboration, we are able to review performance measurements and work together to improve guest outcomes. Collaboration with other providers is important to avoid duplication of services and to make sure guests get access to the help they need. Samaritan's role in the continuum is to provide a temporary emergency shelter for men and a community Soup Kitchen for homeless people and others in need.

Samaritan receives referrals from the CIC and refers guests to case managers for housing assistance. The Empowerment Project, a street outreach program, is housed at Samaritan and provides case management for housing, substance use disorders and mental illness. Following case review, Samaritan encourages guests to attend "Housing Huddle" meetings at City with Dwellings.

Representatives from Stepping Up, a DSS and health department initiative, attend case review and connect eligible guests with peer support. They focus on adults with mental and co-occurring substance use with criminal backgrounds to reduce recidivism.

Experiment in Self Reliance provides a housing specialist to work with Samaritan guests for housing assistance and seeking applicable entitlements and disability where appropriate. ESR ensures that Samaritan can remain housing-first focused.

United Health Centers operates a free medical clinic at Samaritan each Thursday. This gives people in the community, primarily the homeless, access to free health care. This program enhances our services to shelter guests and enables them to see a consistent provider to maintain better health. UHC added a social work intern in September 2021.

Collaboration with City with Dwellings and other shelters in the community (Bethesda, Salvation Army and Rescue Mission) ensures that all shelter beds are used during winter. During last season's overflow (December 2020 – March 2021), Samaritan provided nightly meals for a white flag center.

Project Cornerstone utilizes multiple community agencies, including: Goodwill, VA, Vocational Rehabilitation, Project Re-entry, Crisis Control and ESR. These partnerships give guests an opportunity to learn valuable skills to be employed and to be self-sufficient.

Samaritan shelter counselors make guest referrals to case managers with SOAR training, including Bethesda Center, the Empowerment Project and Triad Disability Advocates. Guests with VA benefits are referred to a VA case manager at the Prosperity Center as well as Veterans Helping Veterans Heal if they may benefit from transitional housing. We also provide suggested resources to guests who express the ability to self-resolve and have income. These partnerships enable Samaritan to fulfill our goal of being a housing-first focused agency.

C. Strategy and Performance

Completed by jan.kelly@samaritanforsyth.org on 11/8/2021 1:02 PM

Case Id: 14323

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Address: *No Address Assigned

C. Strategy and Performance

Please provide the following information.

STRATEGY (5 POINTS)

C.1. The City of Winston-Salem's strategic priorities, adopted most recently in the [2017-2021 Strategic Plan \(2019 Update\)](#) and under review for adoption by City Council for FY 2022 - FY 2025 Strategic Plan, are used as guiding principles to establish community priorities based on the vision, mission, and values set forward by the Mayor and City Council.

Indicate which of the City's strategic focus areas your program aligns with best (select one):

Livable Neighborhoods

C.2. Select the service area(s) that your project/program relates to:

- Housing/Homelessness
- Economic Development
- Construction Rehabilitation
- Poverty Reduction
- Arts and Culture
- Youth
- Public Safety
- Transportation
- Other

PERFORMANCE (15 POINTS)

C.3. Describe the system to be used to track participant and program data. List any key reports and their frequency that will be used to capture project/program performance.

The Agency Administrator assists with data entry so that shelter counselors can focus on thorough completion of intake paperwork and having personal contact with guests for referrals. In 2018, the team developed new procedures and a paperwork checklist (beyond the existing ESG checklist) to improve consistency and quality of data gathered from guests. The agency administrator runs routine reports to check for errors, make corrections, and identify areas in need of improvement. Reports include:

-CAPER report to monitor program performance and data-quality performance - monthly

-ART Report 0315 - Program Daily Census to determine how many nights of shelter have been provided for reporting program performance to Samaritan's Board and for Neighborly/ESG reports – monthly

C.4. Explain the steps that will be taken if the stated program goals provided in C.3. are not achieved.

Samaritan will track nights of shelter and numbers served through the Homeless Management Information System (HMIS). Samaritan has run at, or near, capacity since opening in 1988. We anticipate goals will be achieved, though future planning is uncertain due to the pandemic. The Board of Directors reviews these numbers on a monthly basis to determine any needed steps to improve.

Attach participant/program data sample report

Participant/Program Data Sample Report *Required

participant-program data report.pdf

C.5. Use the chart below to show how your agency measures program effectiveness. List goals, activities, and performance measures you will use to evaluate services, facilities, and programs that will be funded by the City. Performance measures can be quantitative and/or narrative.

Applicants will be reimbursed funds based upon timely submissions of eligible invoices. These invoices should describe services rendered and should align with the goals and objectives cited here. Where outcomes do not align with goals, please be prepared to provide a written summary of shortcomings.

Stated Program Goals	Program Activities in Support of Goals	FY 20-21 Previous Year Results	FY 21-22 Current Year Projected Results	FY 22-23 Next Year Anticipated Results
Operate a temporary, emergency homeless shelter for men, ages 18+.	Provide nightly check in along with breakfast and dinner.	Provided 10,728 nights of shelter to 275 different men.	Due to the ongoing concerns with the pandemic, Samaritan has provided fewer nights of shelter with reduced capacity. First quarter results indicate 3,026 nights of shelter to 115 different men (July – September 2021). We anticipate providing 12,000 nights of shelter to 300 different men by June 30, 2022.	Samaritan will provide over 24,000 nights of shelter to 600 different men. This assumes a return to pre-pandemic capacity.
Samaritan will provide over 25,000 nights of shelter to 650 different men.	Complete VI-SPDAT forms for new guests, provide leadership for community assessment,	31 guests moved to positive housing destinations in FY21 (July 1, 2020 – June 30, 2021).	Samaritan projects that 35 guests will move to permanent housing by June 30, 2022. First quarter results show 15	Samaritan’s goal is to move 80 guests to positive housing destinations. This assumes a return to pre-pandemic

	collaborate with ESR Housing Specialist.		guests moving to positive housing destinations. Results are related to the pandemic.	capacity.
Maintain efficiency in providing services.	Utilize both paid staff and volunteers as well as donated food.	The cost for night of shelter and two meals was \$56.55. Increased costs are due to the pandemic and hiring of staff positions that volunteers usually fulfill as well as keeping the shelter open during the day.	Samaritan is on track to provide a night of shelter and two meals for approximately \$57.	Samaritan's goal is to maintain the cost for a night of shelter and two meals at \$57. Costs may decrease if volunteer labor returns to pre-pandemic levels.

	Total Unduplicated Number Served	Total Number Served
FY 20-21 Previous Year Results	275	10,728
FY 21-22 Current Year Projected Results	300	12,000
FY 22-23 Next Year Anticipated Results	600	24,000

C.6. FY 20-21 Program Accomplishments

Since the outbreak of the pandemic in March 2020, Samaritan has worked cooperatively with the COC to develop solutions. Samaritan has made temporary adaptations:

- Soup Kitchen provides “to go” meals.
- Shelter capacity is reduced from 70 to 35 and is open during the day.
- Project Cornerstone continues with capacity reduced from 10 to 6.
- Masking and six-foot distancing is required. Staff, volunteers, guests and visitors undergo daily screening and temperature checks. COC has provided a plan to quarantine symptomatic guests.
- Volunteers are limited to eight at lunch and two at dinner.
- Expenses have increased. We have hired temporary staff for overnight and daytime monitoring as well as additional maintenance/cleaning. Additional temporary salaries are \$139,731.
- Samaritan provides meals for an isolation hotel which is a collaborative project of the COC for homeless people exposed to COVID or testing positive.

Samaritan is a well-respected non-profit agency in the community and received the Joel and Claudette Weston Award for Excellence in Non-Profit Management in June 2019. This award recognizes efficiency, competence, fiscal integrity, innovation and program effectiveness. Samaritan was recognized for continuing innovative approaches for serving our guests after moving to a new facility. The new building opened in 2014, and thanks to donations from a capital campaign, Samaritan has no ongoing debt service which means that resources can be allocated toward guest services. Samaritan places a high priority on cleanliness to indicate the shelter is a safe place to stay. All new guests have all belongings heat-treated in a clothes dryer or hot box to kill bed bugs. Samaritan provides four healing beds within our

shelter which are designed for homeless men who have been released from the hospital for recovery at home or for those in need of bed rest due to minor illness.

Samaritan looks for opportunities to use our space effectively, and we look forward to allowing partners to serve our guests post-pandemic: Wake Forest Law student expungement clinics, a volunteer-run computer lab for guest housing/job searches, AA/NA meetings and resource groups (food stamp certification, voter registration, health screenings, haircuts and new housing orientation for the community intake center). These partnerships are considered case by case during the pandemic because we limit visitors to our building.

In June 2020, the Board completed a three-year strategic plan. Focus areas include: equipping the ministry for success (staff development, endowment growth, volunteer services), enhancing basic needs services (nutrition, spiritual care and collaborating on housing resources) and transforming lives to make homelessness non-recurring (mental health, substance use recovery and building guest capacity).

Staff longevity means that staff have knowledge of guest history, excellent rapport and high trust levels. This increases the likelihood that guests will follow through on referrals to services and housing. Experience also brings greater knowledge of community resources so that more targeted referrals can be made. Samaritan is investing in staff by providing training opportunities such as opioid/Narcan and mental health awareness to create greater sensitivity. Since the early 1990s, a formerly homeless man has served on our Board of Directors. We also have people with lived experience serving as staff members and volunteers.

C.7. FY 22-23 Key Objectives

During 2022-23, Samaritan will provide 24,000 nights of shelter to 600 different men and move 80 to positive housing destinations. Goals may be adjusted, depending on the pandemic in order to keep guests, staff and volunteers as protected as possible.

Attach participant/program data sample report

Documentation



Participant/Program Data Sample Report

participant-program data report.pdf

D. Organizational Capacity

Completed by jan.kelly@samaritanforsyth.org on 11/18/2021
10:09 AM

Case Id: 14323

Name: Samaritan Ministries - City ESG - FY23 - 2022/23

Address: *No Address Assigned

D. Organizational Capacity

Please provide the following information.

MISSION (5 POINTS)

D.1. Provide an overview of the organization. Include the organization's mission statement and the major services, programs, and activities provided. How does the proposed project/program help advance the mission of your organization?

The mission of Samaritan Ministries is to provide food, shelter and hope through Christian love. Our programs include:

- 1) Samaritan Soup Kitchen, established in 1981, provides a free, hot, nutritious lunch 365 days of the year to anyone in need, including men, women and children. In 2020-21 we provided 131,610 meals to the community.
- 2) Samaritan Inn, established in 1988, provides shelter, dinner and breakfast to up to 70 men 365 nights of the year. In 2020-21, we provided 10,728 nights of shelter and day services to 275 different men. During the pandemic we have reduced the number of shelter guests to 35.
- 3) Project Cornerstone (1995) is a transitional housing program for up to 10 homeless men in recovery. Capacity is six during the pandemic.

In addition to our programs, Samaritan collaborates with others to provide services for people experiencing homelessness:

-In partnership with Atrium Health Wake Forest Baptist Division of Faith & Health Ministries, Samaritan houses the Empowerment Project, a street outreach program. Empowerment provides case management and connects homeless adults and families experiencing mental health struggles or substance use disorders to resources.

-Experiment in Self-Reliance offers a housing specialist to assist guests in moving to housing.

-United Health Centers operates a free medical clinic from Samaritan's facility every Thursday. The clinic is available to shelter guests for no charge and without appointments.

ESG funding for Samaritan's emergency shelter helps advance the mission of Samaritan Ministries because it enables us to provide food and temporary shelter for homeless men. It is an essential part of the Continuum of Care of Winston-Salem.

FUNCTION (5 POINTS)

D.2. How long has your organization been in operation?

Soup Kitchen - 1981; Shelter - 1988; Project Cornerstone - 1995. Samaritan celebrates 40 years of service in 2021.

D.3. How does your organization benefit and serve the City of Winston-Salem and its citizens?

Samaritan Ministries benefits the city of Winston-Salem and its citizens by providing a safe, restful place for men experiencing homelessness to live temporarily while working on housing plans. We give some of the most vulnerable residents respect, dignity, safety and rest for their soul and body.

STRUCTURE (5 POINTS)

D.4. In the chart below, list key personnel and executive staff involved in the proposed project/program.

Position Title	Activities/Inputs	Total Work	% of hours
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		Hours Per Week	proposed to be funded
Shelter Manager	Manage night-time shelter operations two times each week. Provide limited case management services including guest intake, guest housing plans, case reviews, house meetings and crisis intervention. Complete intake forms and enter HMIS data. Supervise shelter staff. Hold weekly daytime meetings with guests regarding housing assistance.	40	0.00 %
Senior Staff counselor	Conduct night-time operations two nights per week. Provide limited case management services including guest intake, housing plans, case reviews, house meetings and crisis intervention. Complete intake forms and enter HMIS data. Hold weekly daytime meetings with guests regarding housing assistance.	40	0.00 %
Staff counselor	Conduct night-time operations two nights per week. Provide limited case management services including guest intake, housing plans, case reviews, house meetings and crisis intervention. Complete intake forms and enter HMIS data. Hold weekly daytime meetings with guests regarding housing assistance.	40	0.00 %
Staff counselor (part-time)	Conduct night-time operations two nights per week. Provide limited case management services including guest intake, housing plans, case reviews, house meetings and crisis intervention. Complete intake forms and enter HMIS data.	14	0.00 %
Assistant Director	Manage facility, maintenance and grounds operations including regular inspections of the facility. Monitor flow of case management and housing services provided in the shelter, Project Cornerstone, Empowerment Project and ESR Housing Specialist. Provide case management for shelter guests in critical need. Monitor daytime crisis intervention. Actively participate in COC meetings and subcommittees.	40	0.00 %
Executive Director	The executive director serves as Chief Executive Officer overseeing all aspects of the organization. As such, he/she is responsible for the day to day operations of Samaritan with responsibilities that include fiscal, programming, administration, development, public relations and all other related areas pertinent in any way to the operation, reputation and integrity of the organization. Note that compensation listed below includes: salary, retirement, health/dental benefits and FICA.	40	0.00 %

D.5. List all executive staff and their compensation (other than per diem).

Executive Staff Name	Title/Role	Compensation	% of Hours
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			Proposed to be Funded
Jan Kelly	Executive Director	\$106,806.57	0.00 %

D.6. Attach an organizational chart

Organizational Chart *Required

Org Chart 11-2-21.docx

D.7. Please complete the Diversity of Employment and the Employment Profile below. See the [Request for Proposals \(RFP\)](#) for definitions of position types used in the Employment Profile.

Describe the hiring process and how it is structured to provide the most diverse candidate pool. Best practices for accessing a diverse hiring process and candidate pool include:

Samaritan advertises for positions in a variety of print and on-line publications: Newspapers, PiedmontHelpWanted.com, NC Center for Non-Profits, Indeed and professional organizations. In addition, we network within the community through churches, United Way, other shelters, etc. Applicants respond with a resume and/or job application. We do not ask for nor do we track ethnicity or age in the application process.

Please enter the total number of Full-Time Positions and Employees you have in the table below, as well as the employee's appropriate race/ethnicity and gender identity.

	Male - White	Male - Black	Male - Other	Female - White	Female - Black	Female - Other
Executives/Managers	0	2	0	2	1	0
Professionals	0	3	0	1	1	0
Technicians	0	0	0	0	0	0
Office/Clerical	0	0	0	0	0	0
Laborers/Service Workers	0	1	0	1	1	0
Total Full-Time						

Please enter the total number of Temporary/Part-Time Positions (FTE) and Employees you have in the table below, as well as the employee's appropriate race/ethnicity and gender identity.

	Male - White	Male - Black	Male - Other	Female - White	Female - Black	Female - Other
Executives/Managers	0	0	0	0	0	0
Professionals	0.3	0.4	0	0.5	0	0
Technicians	0	0	0	0	0	0
Office/Clerical	0.6	0	0	0	0	0
Laborers/Service Workers	0.3	4.875	0	0.2	0.3875	0
Total Part-Time/Temp						

D.8.

Attach a list of all Board Members AND compensation (other than per diem) *Required

Board Roster FY22.pdf

D.9. Number of full Board meetings held during the last twelve months

9

D.10. Number of Board's Executive Committee meetings held during the last twelve months

1

ABILITY (5 POINTS)

D.11. If this is an application for new funding, please describe the steps your organization will take to establish an action plan for successful program launch, including appropriate stakeholder training and coordination. Articulate a clear methodology for service delivery within the context of established goals and include a timeline of key action items and approximate dates for delivery.

The shelter remains open for 365 days and nights each year. There are no start-up costs or issues.

D.12. Describe your organizations' past success with flexibly responding to unforeseen events, which had the potential to negatively impact deliverables. What were best practices learned, if any? How would you successfully use these practices with the proposed program, if necessary?

One of the best examples of Samaritan's response to unforeseen events is our response to COVID. As we discussed adjustments to our operation in March 2020, we sought outside advice and expertise from the Forsyth County Public Health Department, NCDHHS, CDC, Continuum of Care/other shelters and HUD. We brought our staff team together to discuss potential efforts to prevent COVID in the shelter and determined best next steps together. As the pandemic evolved and information changed, we are able to adjust because of excellent internal and external communication as well as well-defined roles and responsibilities. These best practices are essential as we continue to move forward through the pandemic and as we work with our shelter guests on a daily basis.

D.13. How does your program's policies/procedures ensure fair treatment, equitable access, and utilization of benefits for all persons, particularly marginalized and underserved groups and communities (i.e., marketing, outreach, eligibility determination and appeals)?

Samaritan operates a low barrier shelter, and admission is based on vulnerability, using Community Intake Center and ESG VI-SPDAT forms. Guests who check in and obtain a bed may stay up to 90 days (120 days in winter months). Guests must be 18+ years old and male. As part of its commitment to being a low-barrier and housing-focused emergency shelter, Samaritan Inn rarely terminates assistance. When assistance does have to be terminated (i.e., violence, drug possession), referrals to other community resources are always made. Being clean and sober is not a requirement for admission to Samaritan Inn. Shelter counselors place a high priority on guest safety during the admission process.

During admission, a staff counselor completes required documentation and an assessment. Guests are encouraged to follow through with recommended referrals. If a guest has limited English proficiency, or a communication impairment, a translator will be provided within 24 hours. All new shelter admissions are referred at the time of intake to an in-house case review which begins the process of linking guests to resources for housing and other resources.

Samaritan has a grievance procedure in place. If a guest is dissatisfied with a Staff Counselor's decision, he may appeal it within 48 hours to the Shelter Manager in person, over the phone, or in writing. Alternative shelter referrals are given at the time of any violation. If a guest wants to appeal the Shelter Manager's decision, he must attend case review where guests and shelter staff to focus on solutions. If the grievance remains unsolved, a guest may contact the Winston-Salem Human Relations Department. Contact information is provided on a handout posted at Samaritan

and reviewed with each guest at check in.

Samaritan complies with the letter and spirit of the Fair Housing Act that prohibits housing discrimination against persons based upon race, color, religion, national origin, sex, familial status, and disability. Samaritan's building was constructed in 2014 as ADA compliant and it is our policy to remain accessible to people with disabilities.

In 2021, the executive director and assistant director participated in 18 hours of training through Crossnore's Center for Trauma Resilient communities. Topics included trauma science, resilient strategies, organizational stress, adverse childhood experiences and systemic violence including racism. As a result of training, we have added a "community meeting" format to our staff meetings to recognize staff trauma and promote support and self-care. We recognize that we are on a journey to be better trauma-informed. Samaritan also participates in monthly discussions as part of the COC's Racial Equity Learning Team to review best practices from other communities and consider data from our own community. We are committed to working with the COC and the data coordinator to provide data and continue to learn in order to make changes.

E. Cost Effectiveness

Case Id: 14323

Name: Samaritan Ministries - City ESG - FY23 - 2022/23

Completed by jan.kelly@samaritanforsyth.org on 11/8/2021 12:14 PM

Address: *No Address Assigned

E. Cost Effectiveness

Please provide the following information.

BUDGET AND FUNDING (10 POINTS)

E.1. Please complete the table to show the organization's operating budget.

Expenditures by Program	Budgeted FY 21-22	Projected Actuals FY 21-22	Proposed Budget FY 22-23
Program Services	\$1,389,803.86	\$1,389,803.86	\$1,459,294.05
Fundraising	\$177,765.61	\$177,765.61	\$186,653.89
Management and General	\$48,481.53	\$48,481.53	\$50,905.61
Total Expenditures by Program	\$1,616,051.00	\$1,616,051.00	\$1,696,853.55

Expenditures by Category	Budgeted FY 21-22	Projected Actuals FY 21-22	Proposed Budget FY 22-23
Employee Salaries and Wages	\$900,461.00	\$900,461.00	\$802,513.83
Employee Benefits	\$281,400.00	\$281,400.00	\$280,242.00
Facility Rent and Utilities	\$138,450.00	\$138,450.00	\$142,603.50
Training and Conference Registration	\$3,000.00	\$3,000.00	\$3,090.00
Membership and Dues	\$1,200.00	\$1,200.00	\$1,236.00
Travel and Transportation	\$3,250.00	\$3,250.00	\$3,347.50
Grants to Individuals and Organizations	\$0.00	\$0.00	\$0.00
Contracted Fundraising Services	\$0.00	\$0.00	\$0.00
Goods Purchased for Resale	\$0.00	\$0.00	\$0.00
Other Contracted Services	\$0.00	\$0.00	\$0.00
Other Operating Expenditures	\$288,290.00	\$288,290.00	\$302,704.50
Capital Outlay	\$0.00	\$0.00	\$0.00
Total Expenditures by Category	\$1,616,051.00	\$1,616,051.00	\$1,535,737.33

Revenues by Category	Budgeted FY 21-22	Projected Actuals FY 21-22	Proposed Budget FY 22-23
City of Winston-Salem	\$18,982.00	\$18,982.00	\$20,000.00
Forsyth County	\$0.00	\$0.00	\$0.00
State of North Carolina	\$25,710.00	\$25,710.00	\$27,000.00
Federal Government	\$40,000.00	\$40,000.00	\$40,000.00
Admissions/Program Revenues/Sales	\$0.00	\$0.00	\$0.00

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15 of 28

Memberships	\$0.00	\$0.00	\$0.00
Donations	\$1,214,518.00	\$1,214,518.00	\$1,255,337.33
Foundation Grants	\$50,000.00	\$50,000.00	\$55,000.00
Interest and Investment Income	\$122,937.00	\$122,937.00	\$130,000.00
Parent Organization	\$0.00	\$0.00	\$0.00
Other	\$143,904.00	\$143,904.00	\$8,400.00
Total Revenues by Category	\$1,616,051.00	\$1,616,051.00	\$1,535,737.33

Describe any amounts listed under "Other Operating Expenditures" or "Other Revenues." Provide details on any specific federal government revenue sources.

Other operating expenses include: fundraising, IT/computer expenses, office supplies, postage, accounting expenses, investment fees, audit, board operations, laundry/linen, case management, shelter supplies, food, kitchen supplies, waste removal and volunteer management. Other revenue: FY21 includes reimbursement for space costs by Wake Forest Baptist Health and special COVID-19 funding (ESG sources). Federal government revenue source is FEMA. Salaries for FY23 are lower with anticipation of temporary part-time employees not being needed after the COVID pandemic.

E.2. Has the City of Winston-Salem provided funding in the past? If so, provide a funding history of the most recent five years of City contributions in the table below.

Year	Funding Source	Funding Amount
2020	City ESG	\$20,963.00
2019	City ESG	\$20,963.00
2018	City ESG	\$21,235.00
2017	City ESG	\$20,212.00
2016	City ESG	\$20,846.00
2020	State ESG	\$25,734.00
2019	State ESG	\$25,399.00
2018	State ESG	\$24,939.00
2017	State ESG	\$24,686.00
2016	State ESG	\$24,388.00

E.3. Complete the table below to show specific details of proposed City funding and other leveraged funding for the proposed project/program. List each additional funding source for the program.

Activity	Funding Requested from City	Funds from Other Sources	Other Funds Source
Utilities	\$6,000.00	\$6,000.00	contributions
Food	\$14,000.00	\$14,000.00	contributions
	\$20,000.00	\$20,000.00	

E.4. For each activity and line item above, please provide a short but detailed description of how City resources will be used to carry out proposed programming.

City resources will be used to provide food for shelter guests and to pay for utilities (water, electricity, gas) to keep the shelter operational to meet the needs of our guests.

E.5. Where another stakeholder or agency is providing non-monetary assistance with a particular aspect of your programming, please provide a short description of those activities and how they will supplement the use of City

funds.

Samaritan collaborates with other organizations to supplement our services which will also enhance the use of City funds. These significant partners include Empowerment Project (case management), ESR (housing specialist) and United Health Centers (medical care). Volunteers are also a significant resource for Samaritan Ministries. Volunteers provided 24,916 hours of service in 2020.

E.6. If this year's request is different in any way (amount, activities, etc.) from a prior year's request, explain how and why. If you are a new applicant, please describe how you would adjust your project/program if your funding request is not funded at the full amount.

Samaritan's request is similar to prior years and includes similar activities. However, there have been significant expenses to protecting our staff, volunteers and guests during the pandemic. We continue to make progress together toward ending chronic homelessness. New faces come to Samaritan's shelter every day, and it is important for our community to provide for the most basic needs of food and shelter while connected these men to housing resources as soon as possible.

SUSTAINABILITY (7 POINTS)

E.7. Describe the plan to sustain the project/program funding in future years. Include information about other funding sources to leverage City funds requested.

Samaritan annually receives donations from a wide variety of funders. Our revenue for 2021-22 includes individuals/major gifts (43%), special events (20%), churches (9%), government (7%), endowments (7%), foundations & corporations (7%), special COVID funding (6%) and other (1%). While we rely on charitable giving every year to make our budget, we have a proven track record of running a balanced budget for more than eleven years.

The board's development committee develops an annual strategy for fundraising which includes appeal letters, newsletters and special events. Subcommittees work on special events -- SAM & Eggs Fundraising Breakfast, Penny Campaign and Tour de Llama Cycling Event. Additional subcommittees target solicited major gifts from individuals, engaging millennials as donors and volunteers, involving church volunteers and reaching out to the corporate community. These sources are used to leverage City funds requested.

BARRIERS (3 POINTS)

E.8. Describe any potential programmatic barriers to project implementation (e.g. recruitment or outreach challenges, etc.) and your plans for overcoming them.

Samaritan is fortunate to have a seven-year old facility in order to increase our capacity to serve hungry and homeless people. The Board of Directors will continue to monitor staffing levels. Any loss of government funding could become a barrier, and Samaritan would have to raise additional funds from the community to meet the need. Additional funding has been necessary to meet the needs of providing as safe an environment as possible during the COVID-19 pandemic with increased expenses of at least \$168,561. We are grateful for additional grants that have been made through ESG and the City of Winston-Salem to help meet some COVID expenses.

E.9. Describe any institutional barriers to project implementation (e.g. staff vacancies, pending departures, etc.) and your plans for overcoming them.

We do not anticipate any staff vacancies in the coming year.

AVERAGE COST (5 POINTS)

E.10. Use the table below to show the average amount of City funds requested per beneficiary to be served during the year and the average total cost of the service per beneficiary to be served during the year (including all funding sources)

Proposed funds from the City for this project:	\$20,000
Number proposed to be served for the year:	600
Average City funds per beneficiary:	\$33.33
Proposed funds from all sources:	\$40,000
Number proposed to be served for the year:	600
Average total funds per beneficiary:	\$66.67

F. Required Documents

Completed by jan.kelly@samaritanforsyth.org on 11/18/2021
10:22 AM

Case Id: 14323

Name: Samaritan Ministries - City ESG - FY23 - 2022/23

Address: *No Address Assigned

F. Required Documents

Please provide the following information.

Documentation

Code of Conduct/Conflict of Interest Policy *Required

Samaritan Conflict of Interest.pdf

Submit a copy of the agency's latest 990 Form as submitted to the Internal Revenue Service. *Required

Form 990 6-30-21.pdf

Organization By-Laws *Required

Samaritan Bylaws.pdf

Articles of Incorporation *Required

Samaritan Articles of Incorporation.pdf

Organization Policies (including personnel, formal non-discrimination, procurement, accounting, etc) *Required

Samaritan Personnel Policies.pdf

Procurement policies.pdf

Accounting Procedures.pdf

Fair Housing Policy.pdf

Samaritan Inn Guidelines.pdf

Confidentiality Policy.pdf

Statement of Non-Discrimination.pdf

IRS 501(c)3 Designation Letter *Required

501(c)(3).pdf

Audited Financial statements or third-party review from 2019 and 2020. *Required

Audit 6-30-21.pdf

Audit 6-30-20.pdf

North Carolina Secretary of State - Current and Active Status (<https://www.sosnc.gov/search/index/corp>)

***Required**

Current Active Status.pdf

Participant/Program Data Sample Report *Required

participant-program data report.pdf

Other

City ESG Cover Letter FY23.pdf

G. Income Based Projects/Services Only

Case Id: 14323

Name: Samaritan Ministries - City ESG - FY23 - 2022/23

Address: *No Address Assigned

Completed by jan.kelly@samaritanforsyth.org on 11/8/2021 12:17 PM

G. Income Based Projects/Services Only

** Complete this section only if you are requesting funds for a Community Development project (for CDBG, HOME and/or ESG funding).**

If the section is not applicable to your project, please leave the questions blank and mark the step "Complete."

G.1. In the right-hand column below, indicate the number of participants to be served by the proposed project/program within each income category during the year. Click [here](#) to see Winston-Salem income limits by household size.

Income Range	# to be served
0 to 30% of median	0
31% to 50% of median	0
51% to 80% of median	0
Greater than 80% of median	0

G.2. Describe policies, procedures, and criteria for determining who is eligible. Describe the procedures for screening, eligibility determination, intake, assessment and orientation of participants

H. Construction/Rehab Only

Completed by jan.kelly@samaritanforsyth.org on 11/16/2021 6:09 PM

Case Id: 14323

Name: Samaritan Ministries - City ESG - FY23 - 2022/23

Address: *No Address Assigned

H. Construction/Rehab Only

** Complete this section only if you are requesting funds for a Housing Construction or Rehabilitation project.**
If the section is not applicable to your project, please leave the questions blank and mark the step "Complete."

H.1. Describe the proposed project and provide plans. If the project is approved, we will need a detailed work write-up.

H.2. Provide a projected timeline for the proposed work.

H.3. Describe how the project will be managed, including the contractor procurement process.

H.4. Describe the target market, including any special populations to be served.

H.5. Describe the services or program you plan to provide.

H.6. Describe the property management plan.

H.7. List the development team members.

H.8. Describe the financial capability of the sponsor/owner organization.

H.9. Listing of projects undertaken by principals over the past ten years, identifying project name and address, type of project, and number of units; please note any projects for which local government funding was received.

Project Name	Address	Type of Project	No. Units	Govt Funding
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Documentation

Development budget that include a detailed sources and uses statement of all funds, including the requested loan from the City, in electronic format, preferably a spreadsheet. ***Required**

Printed By: Rene Williams on 1/28/2022

22 of 28

Not applicable to Samaritan Ministries.pdf

Participant/program data sample report *Required

Not applicable to Samaritan Ministries.pdf

Market study or other analysis to verify the need for the project. *Required

Not applicable to Samaritan Ministries.pdf

Operating pro forma that includes rent and operating cost assumptions and all estimated loan payments, in electronic format. *Required

Not applicable to Samaritan Ministries.pdf

I. Emergency Shelter Only

Case Id: 14323

Name: Samaritan Ministries - City ESG - FY23 - 2022/23

Address: *No Address Assigned

Completed by jan.kelly@samaritanforsyth.org on 11/8/2021 12:20 PM

I. Emergency Shelter Only

** Complete this section only if you are requesting funds for an Emergency Shelter project. **

If the section is not applicable to your project, please leave the questions blank and mark the step "Complete."

Prior to the beginning of any funding year, any ESG-funded program must participate in the local Homeless Management Information System (HMIS) designated by the Winston-Salem/Forsyth County Continuum of Care, or for domestic violence programs, a comparable database in accordance with HUD's standards.

Emergency Shelter: Essential Services

Activity	Total Budget (\$)
Case Management	\$0.00
Child Care	\$0.00
Education Services	\$0.00
Employment Assistance	\$0.00
Job Training	\$0.00
Outpatient Health Services	\$0.00
Transportation	\$0.00
Legal Services	\$0.00
Services to Special Population	\$0.00
Overhead Costs (limited to 15% of total activity request)	\$0.00
	\$0.00

Emergency Shelter: Operating Costs

Activity	Total Budget (\$)
Rent	\$0.00
Shelter Security	\$0.00
Fuel	\$0.00
Equipment	\$0.00
Insurance	\$0.00
Utilities	\$6,000.00
Food	\$14,000.00
Furnishings (limited to less than \$500 per item)	\$0.00
Supplies	\$0.00
Maintenance or Minor Repairs	\$0.00
Overhead Costs (limited to 15% of total activity request)	\$0.00
	\$20,000.00

J. Rapid Rehousing and HMIS Only

Completed by jan.kelly@samaritanforsyth.org on 11/8/2021 12:18 PM

Case Id: 14323

Name: Samaritan Ministries - City ESG - FY23 - 2022/23

Address: *No Address Assigned

J. Rapid Rehousing and HMIS Only

** Complete this section only if you are requesting funds for a Rapid Rehousing project. **

If the section is not applicable to your project, please leave the questions blank and mark the step "Complete."

Prior to the beginning of any funding year, any ESG-funded program must participate in the local Homeless Management Information System (HMIS) designated by the Winston-Salem/Forsyth County Continuum of Care, or for domestic violence programs, a comparable database in accordance with HUD's standards.

Rapid Rehousing Financial Assistance

Activity	Total Budget (\$)
Rent Assistance	\$0.00
Rental Application Fees	\$0.00
Security Deposits	\$0.00
Last Month's Rent	\$0.00
Utility Deposits	\$0.00
Utility Payments	\$0.00
Moving Cost Assistance	\$0.00
Overhead Costs (limited to 15% of total activity request)	\$0.00

Rapid Rehousing Services

Activity	Total Budget (\$)
Case Management	\$0.00
Housing Search and Placement	\$0.00
Mediation	\$0.00
Legal Services	\$0.00
Credit Repair	\$0.00
Counseling	\$0.00
Information and Referral	\$0.00
Monitoring/Evaluation of Progress	\$0.00
Overhead Costs (limited to 15% of total activity request)	\$0.00

HMIS/Data Collection Budget

HMIS Activity	City ESG Request	State ESG Request
Staff Costs	\$0.00	\$0.00
Equipment	\$0.00	\$0.00
User Fees	\$0.00	\$0.00
	\$0.00	\$0.00

K. HOPWA

Completed by jan.kelly@samaritanforsyth.org on 11/8/2021 12:18 PM

Case Id: 14323

Name: Samaritan Ministries - City ESG - FY23 - 2022/23

Address: *No Address Assigned

K. HOPWA

Please provide the following information.

Are requesting funds for a HOPWA project?

No

Submit

Completed by jan.kelly@samaritanforsyth.org on 11/18/2021
10:24 AM

Case Id: 14323

Name: Samaritan Ministries - City ESG - FY23 - 2022/23

Address: *No Address Assigned

Submit

I certify that the applicant meets the conditions specified in the application instructions and will be able to carry out the proposed services in concert with these conditions. I also certify that the organization is a certified IRS 501(c)(3) non-profit organization.

Jan Kelly

Electronically signed by jan.kelly@samaritanforsyth.org on 11/18/2021 10:10 AM

IDIS Setup

No data saved

Case Id: 14323

Name: Samaritan Ministries - City ESG - FY23 - 2022/23

Address: *No Address Assigned

IDIS Setup

Please provide the following information.

Project Name

National Objective

Activity Number ID

HUD Activity Code

Project Description

Accomplishment Type

Initial Application Date

Service Area

Ward

Census Tract(s)

Block/Group

MWBE