

A. Organization & Contact Information

Completed by smatthews@shepherdscenter.org on 10/28/2021 12:16 PM

Case Id: 14245
Name: Shepherd's Center of Greater Winston-Salem -
Address: *No Address Assigned

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

Shepherd's Center of Greater Winston-Salem

A.2. Project/Program

Services for Older Adults

A.3. FY 2022-23 Funding Request Amount

\$25,000.00

A.4. Agency's Total Operating Budget

\$728,200.00

A.5. Mailing Address

1700 Ebert Street Winston Salem, NC 27103

A.6. Project/Program Location Address

1700 Ebert Street Winston Salem, NC 27103

A.7. Organization Website

Shepherd's Center of Greater Winston-Salem

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

1985

A.9. Organization Fiscal Year

Shepherd's Center of Greater Winston-Salem

A.10. Federal Tax ID Number

A.11. Federal DUNS Number

EXECUTIVE DIRECTOR/MANAGER

A.12. Name, Title

Samuel C. Matthews, Executive Director

A.13. Email

smatthews@shepherdscenter.org

A.14. Phone

(336) 748-0217

CONTACT

A.15. Name, Title

Samuel C. Matthews, Executive Director

A.16. Email

smatthews@shepherdscenter.org

A.17. Phone

(336) 748-0217

BOARD CHAIR

A.18. Name

Ray .W. Hawley

A.19. Term Expiration

12/31/2022

A.20. Email

rayhawley@aol.com

A.21. Phone

(336) 945-9492

B. Project Overview

Completed by smatthews@shepherdscenter.org on 10/28/2021
11:22 AM

Case Id: 14245

Name: Shepherd's Center of Greater Winston-Salem -

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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?

The Shepherd's Center of Greater Winston-Salem is certified as a Senior Center of Excellence by the N.C. Division of Aging and Adult Services. The Shepherd's Center receives limited funding from the state through Home and Community Care Block Grant (HCCBG) and State General Purpose Senior Center funding. The state funding represents approximately 10% of the total operational funding for our agency. In 2021-2022, the Shepherd's Center was awarded \$15,000 in City of Winston-Salem funding for the services provided for the over 6,500 older adults. This investment by the City has paid significant dividends. We are requesting \$25,000 in funding from the City of Winston-Salem for 2022-2023 to support the increasing requests for services from older city residents aged 60+. Our service request growth has exceeded 20% since our funding began in 2016.

Approximately 85% of the 6,500+ older adults served each year by the Shepherd's Center reside in the Winston-Salem city limits. Based upon the rising number of older adults in Forsyth County, and the lack of existing resources, there is a critical need to fund existing services for older adults.

The Shepherd's Center works collaboratively with Senior Services, Inc. with no duplication of services whatsoever. Each agency has a unique mission, target population and scope of services. We currently receive approximately 60% of our referrals from Senior Services as a participant in the Community Resource Connection (CRC). The programs and services of the Shepherd's Center enable older adults to remain independent in their own homes and complement the services offered by Senior Services. Additionally, health and wellness programs and activities are offered through our Vital Living Program which is unique to our service area. We are also a collaborative partner in the Age-Friendly Forsyth initiative.

Our services include transportation to medical appointments and grocery shopping, minor home repairs as well as visitation and support for family caregivers. We serve over 2,500 older adults each year with these critical services.

Client surveys indicate that over 80% of those we serve would have not kept a medical appointment, gone without a meal or would have experienced significant family disruption with family caregiving.

Over the past six years of prior City funding, we have responded to:

- over 60,000 requests for one-way transportation trips for medical services and grocery shopping for over 5,000 older adults
- 3,500+ minor home repair requests for over 1,500 older adults
- in excess of 7,500 individual or respite care visits
- coordinated caregiver training for over 200 family caregivers

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- coordinated a monthly meal and social experience for over 450 older adults through the Saturday Night Fellowship Program for older adults who live in subsidized housing in the community.
- Health and wellness programs provided by our Senior Center for active older adults are highly regarded statewide as we have served over 3,500 adults annually.

Each year Shepherd's Center volunteers devote in excess of 40,000 hours of service, saving our local government and the community over \$1,000,000 in cost for the services provided.

As a certified Senior Center of Excellence, we are recognized as an exemplary "senior center without walls" as we offer activities in the broader community to serve older adults closer to where they live. We maintained and actually increased services during Covid 19.

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

Participants have unlimited access to Shepherd's Center programs and services. The majority of services are provided at little or no cost to the participants. Promotion of the services is accomplished through the media (WS Journal, The Chronicle, Clemmons Courier, etc.), our agency website, and participation in local agency and health fairs conducted throughout the community.

Referrals for our services for older adults in need of services is accomplished through our collaboration with Senior Services, Forsyth DSS, both area hospital systems, the broad faith community, home care and home health agencies, and other senior services providers.

The local medical community also refers participants to our health and wellness programs which include both landbased and water exercise classes. We consistently track outcomes of the participants in all service areas. Our surveys indicate that over 80% of those receiving transportation services (1,400+ individuals) would have missed a medical appointment if it had not been for our services. And, 90% of those surveyed noted that our services allowed them to remain independent in their homes longer. Those who have received minor home repair services (currently averaging 40+ requests per month), indicate that these services allow them to remain independent in their homes as well. Of those currently being served, 65 - 70% live at or below 200% of the Federal Poverty Level.

Likewise, participants in the Shepherd's Center Vital Living Senior Center Program, report achieving significant health and wellness benefits. The offerings include Tai Chi for Arthritis, Tai Chi for Memory, Yoga, Matter of Balance classes, Living Healthy with Chronic Disease classes, warm water exercise classes 6 days per week along with bridge classes and sessions 5 days per week, day trips and numerous social activities. Surveys have shown that the types of classes offered not only benefit individual's health and wellness, but offer strong social connections which mitigate the significant side effects of social isolation which includes depression and failing health.

Referrals are routinely made by physicians in the community to both program areas for either access to services or health and wellness activities which help with strength, balance and memory issues.

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

The greater Winston-Salem area has resources that provide home health services, telephone reassurance, financial assistance and limited medical transportation for elderly recipients. However, these services leave significant gaps – particularly for affordable services offered to older adults who desire to remain independent in their own homes as long as possible and those with disabilities who cannot access those services.

The recently completed Age-Friendly Forsyth (AFF) research collaborative indicated significant needs in the areas of transportation, home repairs, support for family caregivers and increased access to information regarding available services. It should be noted that these identified needs are those the Shepherd's Center addresses. See the attached overview of AFF.

Many older adults on fixed incomes cannot afford the services generally available to the public and must have the support of volunteer-driven organizations like the Shepherd's Center to remain independent. Our services, combined with other services received from collaborative partners has been shown to allow individuals to remain independent.

Funding for service for older adults is lacking in our community. Grants for aging services across the board do not allow the Shepherd's Center or other partners to adequately address the growing needs. There are waiting lists in almost all service areas. The increasing older population is resulting in ever increasing requests for services.

As the Forsyth County coordinating site, the Shepherd's Center receives limited funding from the N.C. Department of Insurance to address the growing needs of Medicare beneficiaries in our community. There are over 70,000 older adults in our community receiving Medicare health coverage. Our goal through the N.C.Seniors' Health Insurance Information Program (SHIIP) is to educate and counsel more than 1,500 of those individuals annually to assist with their healthcare coverage. We actively participate in the quarterly City retiree seminars to provide education on Medicare options available to City employees upon retirement.

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?

The Shepherd's Center excels in collaborating with many organizations within our community for effective program implementation and service delivery. Collaborations include active participation in Age-Friendly Forsyth, the City of Winston-Salem, Forsyth County, Social Security, the NC Department of Insurance, the Piedmont Council of Governments Area Agency on Aging, the Department of Social Services, Forsyth County Department of Health, Senior Services, Forsyth County Public Library system, Trellis/Hospice and Palliative Care Center, the Adaptables, the Enrichment Center, the Shepherd's Center of Kernersville, Financial Pathways/Senior Financial Care, Habitat for Humanity, Wake Forest Baptist Medical Center, FaithHealthNC, Novant Health/Forsyth Medical Center, Winston-Salem State University, Wake Forest University, Salem College, Forsyth Technical Community College, numerous area faith communities as well as all of the continuing care retirement communities in the area, independent living communities and numerous home health care agencies.

C. Strategy and Performance

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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):

Quality Transportation

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.

Each program area tracks the individual services provided, the number of individuals served and activity on a daily and monthly basis. Participant data is maintained in a central database system. Participant and client involvement is maintained in service-level tracking systems.

Transportation clients, volunteers and activity requests are maintained in a nationally recognized and contracted system called RideScheduler. Daily, weekly and monthly reports are prepared for tracking and reporting to various stakeholders.

Minor home repair and caregiver services tracking is performed through a proprietary agency programs and services database. Vital Living Program Senior Center participation is maintained in a centralized tracking system that accounts for attendance at the activity level for each day, week and month.

Grants through the City DOT for FTA 5310 transportation funding and the Elderly and Disabled Transportation Program (EDTAP) funding are tracked for service requests, medical and nutritional trips, new clients, volunteer usage and client demographics.

For annual Seniors' Health Insurance Information Program (SHIIP) grants we track counseling appointments, cost savings, outreach and educational activities through a National Seniors' Health Insurance Program (SHIP) Tracking and Reporting System data base (STARS) supported by the Administration for Community Living (ACL), a division of the Federal Department of Health and Human Services.

We produce service level reports and perform internal reviews monthly to track current and historical performance. Key reporting includes comprehensive review of transportation participants, volunteer support and service requests; minor home repair requests, repairs completed, repairs referred and pending repairs along with volunteer or volunteer group involvement.

Trends are continually monitored for activity and participation levels. Health and wellness program and participation activity is recorded daily and summarized monthly and annually.

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

In the event these stated program goals and related activities in support of the goals are not met, we will evaluate the metrics for each goal that is deficient and determine the reason for failing to meet the goal, assess the failure in-depth and make corrective action to those reasons which are within our control.

Attach participant/program data sample report

Participant/Program Data Sample Report *Required

1st Quarter 2021-2022 Activity Report.docx

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
Provide essential transportation for older adults for	1. Provide older adult city residents with transportation	Responded to 12,032 one-way trip requests for 1,452	Respond to 13,500 one-way trip requests for 1,475	Respond to 14,250 one-way trip requests for 1,500

medical appointments and nutritional needs	<p>services on an annual basis which allows them to remain independent in their own homes</p> <p>2. Provide needed services which allow older adults to access needed health care and nutritional services</p> <p>3. Utilize volunteers to provide the majority of the trip requests using their personal vehicles or contracted services when volunteers are unavailable</p>	older adults	older adults	older adults
Provide minor home repairs for older adults allowing them to remain independent in their homes	<p>1. Provide older adult city residents with minor home repair services which allow them to remain independent in their own homes</p> <p>2. Provide services which enable residents to live in a safe and secure residence</p> <p>3. Utilize volunteers to provide the labor for the repair needs</p> <p>4. Refer more difficult repairs to other agencies or vendors.</p>	Responded to 509 minor home repair requests for 420 older adults	Respond to 660 minor home repair requests for 500 older adults.	Respond to 750 minor home repair requests for 575 older adults.
Provide health and wellness programs and activities through our Vital Living Senior Center program to older adults throughout	1. Offer daily physical fitness, educational and social programs to older adults throughout the city which will support	Offered an average of 55 weekly in-person and virtual physical fitness, educational and social programs throughout the city	Offer an average of 60 weekly person and virtual physical fitness, educational and social programs throughout the city	Offer an average of 60 weekly physical fitness, educational and social programs throughout the city to 4,000 participants

the city	their health and wellness as well as socialization needs.	to 3,490 participants with an overall attendance of 38,583.	to 3,750 participants with an overall attendance of 40,000.	with an overall attendance of 42,000.
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	Total Unduplicated Number Served	Total Number Served
FY 20-21 Previous Year Results	6,365	38,583
FY 21-22 Current Year Projected Results	6,500	39,200
FY 22-23 Next Year Anticipated Results	6,600	39,575

C.6. FY 20-21 Program Accomplishments

Our accomplishments include serving 6,094 older adults by responding to over 10,000 service level requests during 2020. We project serving in excess of 6,600 older adults and 10,000+ service requests in 2021.

The accomplishments included responding to a record 12,032 requests for one-way transportation trips to medical appointments, nutrition/grocery trips and other personal trips during the year. 509 minor home repair requests were received during the year.

Our Vital Living Senior Center Program experienced record attendance of 38,583 while serving a record 3,490 aging adults in our community. The Shepherd's Center is certified as a Senior Center of Excellence by the N.C. Division of Aging and Adult Services.

The Seniors Health Insurance Information Program (SHIIP) which the agency coordinates for Forsyth County, served 1,500 Medicare beneficiaries which resulted in over \$350,000 in savings in 2019. SHIIP is a division of the N.C. Department of Insurance.

Additionally, we have been successful in receiving continued city and county funding (6 years each), increased grant funding through the Winston-Salem DOT for the FTA 5310 transportation program and the state Elderly and Disabled Transportation Program (EDTAP) funding to support the transportation program growth and expanding services to accommodate wheelchair transportation and multiple trips during the week for older adults.

We reached a record level of individuals served during the 2020 and funding to sustain current levels of service. We are actively participating in the Age-Friendly Forsyth (AFF) initiative which is focused on developing a comprehensive long-range aging plan for our community. We are a funding partner, serve on the AFF Leadership Team and the Executive Director is currently the Chairperson and serves on the AFF Executive Team.

During Covid-19, we adjusted successfully to new ways of providing services. With grant funds we have been able to sustain, and even increase, transportation support and through virtual means (Zoom, Facetime, telephone, etc), we were able to actually increase participation in our senior center activities during 2020.

C.7. FY 22-23 Key Objectives

Our key objectives include serving in excess of 6,500 older adults while responding to over 12,000 service level requests through our Faith In Action Care Program and Vital Living Senior Center Program.

These services include essential transportation support, minor home repairs as well as health and wellness senior center program offerings.

We do anticipate some reduction in people served due to Covid-19; however, our number of requests and overall participation should remain positive.

Additionally, services offered through the Seniors Health Insurance Information Program (SHIIP) benefit approximately 1,500 Medicare beneficiaries annually.

We project receiving continued city and county funding, increased grant funding through the Winston-Salem DOT for the FTA 5310 Elderly and Disabled transportation program and the state Elderly and Disabled Transportation Program (EDTAP) to support the transportation program growth and expanding services.

We anticipate reaching a record level of individuals served and funding to sustain current level of service provision. We also project recruiting 100 new volunteers to assist in service provision.

We will continue to be an active partner in the Age-Friendly Forsyth (AFF) initiative, serve on the AFF Leadership Team and AFF Executive Committee.

We will continue to adopt new ways of providing services. With grant funds we will be able to sustain, and even increase, transportation support and through virtual means (Zoom, Facetime, telephone, etc), we will be able to continue to increase participation in our senior center activities during 2020.

Attach participant/program data sample report

Documentation



Participant/Program Data Sample Report

1st Quarter 2021-2022 Activity Report.docx

D. Organizational Capacity

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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 the Shepherd's Center of Greater Winston-Salem is to promote and support successful aging by providing direct services, volunteer opportunities and enrichment programs for older adults.

We serve not only the city but also 85% of Forsyth County . The Shepherd's Center was established in 1985 and is a 501c(3) not for profit organization. 2020 marked our 35th year of service in the community. The center has been certified by the N.C. Division of Aging and Adult Services as a Senior Center of Excellence since 2008.

The Shepherd's Center is comprised of two (2) distinct, yet complementary, program areas which are serving the growing needs of the increasing number of older adults in our community. These program areas are critical to, and advance, the mission of the Shepherd's Center.

The Faith In Action Care Program of the center serves approximately 2,500 older adults (age 60+). The majority of those served were able to remain independent in their own homes as a result of the services provided. Volunteers and staff respond to over 19,000 requests for services during the year. Support is provided to individuals and families through the efforts of over 275 program volunteers who invest in excess of 25,000 hours of volunteer time.

During 2020, the Faith In Action Care Program responded to 12,032 one-way transportation requests. 509 requests for minor home repair services and 214 continuing, as well as new requests for, visitation and respite care services were received. The agency also coordinated training for family caregivers, new volunteers and continuing education for the volunteers in the program. We have worked in concert with the Community and Business Development Department of the city on a number of home repairs for those we serve.

Three other initiatives also continued this past year. 1) caregiver training (Powerful Tools for Caregivers – a nationally recognized evidenced-based program) is coordinated by the agency and offered for family caregivers throughout the community; 2) the Coalition of Ministries with Older Adults, a networking group begun by the agency in 2002 for clergy and staff serving older adults in area congregations as well as agency staff, meets monthly for networking, support and advocacy; 3) coordination of a monthly Saturday Night Fellowship program which was begun in the 1967, and celebrated it's 50th anniversary in 2017. We have coordinated the program since 2005.

The Vital Living Senior Center Program offers activities at our facilities at our Westview Campus as well as other locations throughout the community and serves in excess of 3,500 older adults. Daily programs allow older adults (age 50+) to participate in appropriately designed exercise classes, health and wellness seminars, arts and crafts, fellowship

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and discussion groups, games, day trips, educational classes and other activities. Daily health and fitness classes are offered to include evidenced-based programs supporting strength and balance in older adults.

Additionally, a significant service offering is the Seniors' Health Insurance Information Program (SHIIP) Medicare counseling. Trained senior volunteers offer information to individuals and families regarding Medicare and Medicaid insurance as well as Long Term Care and Medicare supplement insurance. The SHIIP program is a program of the N.C. Department of Insurance. During 2020, over 1,500 individuals were served and over \$350,000 was saved for Medicare beneficiaries in 201

FUNCTION (5 POINTS)

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

Since 1985; incorporated in 1989. 2020 marked our 35th year of service to aging adults in our community.

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

The individuals served by the Shepherd's Center live exclusively in Forsyth County with approximately 85% residing in the Winston-Salem city limits. Older adult citizens benefit from programs and services which improve their overall living condition, health and social connections. Services allow older adults to remain independent in their own homes, health and wellness classes to support healthy lifestyles as well as information and referral to sources which provide them access to needed services.

During our 2020 fiscal year, our volunteers reported in excess of 40,000 hours of service, which (using the national average of \$24.69 per volunteer hour from the Independent Sector) saved our community approximately \$1,020,000 in the cost of services provided for older adults - over \$185 per person served.

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 Hours Per Week	% of hours proposed to be funded
Program Director	Program Director Faith In Action Program Director is responsible for the management and supervision of transportation, minor home repair and caregiver respite care/visitation service areas. Five direct reports are responsible for the day-to-day activities for the service areas outlined. Supervises the coordination and support of 275+ service-level volunteers.	40	5.00 %
Program Director	The Vital Living Senior Center Program Director is responsible for the management and supervision of the senior center program events and activities. One part-time assistant direct report. Program offers and coordinates approximately 55 health and wellness activities each week.	40	5.00 %

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

Executive Staff Name	Title/Role	Compensation	% of Hours Proposed to be Funded
Samuel Matthews	Executive Director	\$69,000.00	2.00 %
Linda Lewis	Associate Executive Director	\$62,520.00	5.00 %
Kristin Larson	Director, Vital Living Program	\$40,500.00	5.00 %

D.6. Attach an organizational chart

Organizational Chart *Required

Organization Structure January 2021.pdf

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:

As positions become open (there has been relatively low turnover in the last 5 years), they are advertised locally and regionally dependent upon the position. Candidate applications and resumes are evaluated for ability to perform the functions required and relevant experience.

According to agency policies, there is no discrimination based on gender, race, religion, sexual orientation or ethnicity. Interviews are conducted with applicants which best meet the training and experience needed for the position(s). Interviews are conducted by management and staff related to the service area.

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	1			2		
Professionals						
Technicians						
Office/Clerical						
Laborers/Service Workers						
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						1
Professionals				3		
Technicians				3		
Office/Clerical				2		
Laborers/Service Workers						

Total Part-Time/Temp						
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D.8.

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

Board Listing 2021.pdf

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

11

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

4

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.

N/A

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?

The Shepherd's Center's programs and services are well established with a 35+year track record of accomplishment. The programs being funded have been actively in place since 1999. Funding and certification has been achieved for each agency program area. Standard operational plans are in place for each program area and for service-level activities. Attached you will find maps of those currently served throughout the community and a Impact Summary of accomplishments during our last calendar year.

Beginning in March 2020, we rapidly revised our operational model of primary volunteer involvement for transportation and minor home repairs and began using contract providers with no interruption in services. Request for both services increased in 2020 over 2019. Likewise, most in-person activities in our Vital Living Senior Center Program areas quickly transitioned to virtual programming and resulted in increased participation and attendance. We found that we were able to quickly respond to a very unforeseen event like Covid-19 very successfully. We returned to more volunteer involvement and in-person activities in the April - May 2021 timeframe while maintaining some hybrid activities.

Over the last ten years, we have successfully expanded the two programs significantly while increasing the number of older adults served by 29% (from 4,937 to 6,365). Service requests increased in all program areas by 65% (from 7,589 to to 15,548). The number of volunteer hours of service has increased by 25% (from 32,000 to 40,000). During this same time, paid staff has remained at the same level.

Over the last 15 years the following major milestones have been achieved:

- Received an Award of Achievement in Older Volunteer Program Management by the MetLife Foundation and the National Association of Area Agencies on Aging (n4a) as part of the 2007 MetLife Foundation Older Volunteers Enrich

America (OVEA) Program Awards.

- Received the 2008 Joel A. Weston, Jr. Memorial Award for Non-Profit Excellence
- Received the 2009 Ernest B. Messer Award from the N.C. Division of Aging and Adult Services for an organization that has excelled in addressing the needs of older citizens in it's community.
- Recognized as one of 25 outstanding programs in volunteer transportation for older adults by the Beverly Foundation and the National Faith In Action Program in 2007.
- Received certification as a Senior Center of Excellence by the North Carolina Division of Aging and Adult Services initially in January 2008.
- Received re-certification as a Senior Center of Excellence by the North Carolina Division of Aging and Adult Services in February 2013.
- Received re-certification as a Senior Center of Excellence by the North Carolina Division of Aging and Adult Services in March 2018. The certification is the highest level for senior centers and is for a 5-year period (2018 – 2023).

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)?

E. Cost Effectiveness

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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	\$659,500.00	\$741,475.00	\$670,521.00
Fundraising	\$27,000.00	\$28,300.00	\$29,500.00
Management and General	\$26,500.00	\$28,250.00	\$28,179.00
Total Expenditures by Program	\$713,000.00	\$798,025.00	\$728,200.00

Expenditures by Category	Budgeted FY 21-22	Projected Actuals FY 21-22	Proposed Budget FY 22-23
Employee Salaries and Wages	\$350,500.00	\$365,781.00	\$358,975.00
Employee Benefits	\$38,500.00	\$46,369.00	\$38,525.00
Facility Rent and Utilities	\$18,000.00	\$16,860.00	\$17,200.00
Training and Conference Registration	\$1,500.00	\$1,200.00	\$1,200.00
Membership and Dues	\$2,000.00	\$2,500.00	\$3,000.00
Travel and Transportation	\$2,500.00	\$800.00	\$1,000.00
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	\$175,000.00	\$185,000.00	\$192,000.00
Other Operating Expenditures	\$125,000.00	\$179,515.00	\$116,300.00
Capital Outlay	\$0.00	\$0.00	\$0.00
Total Expenditures by Category	\$713,000.00	\$798,025.00	\$728,200.00

Revenues by Category	Budgeted FY 21-22	Projected Actuals FY 21-22	Proposed Budget FY 22-23
City of Winston-Salem	\$15,000.00	\$15,000.00	\$25,000.00
Forsyth County	\$40,000.00	\$40,000.00	\$40,000.00
State of North Carolina	\$130,000.00	\$135,000.00	\$140,000.00
Federal Government	\$167,000.00	\$165,000.00	\$170,000.00
Admissions/Program Revenues/Sales	\$50,000.00	\$34,750.00	\$50,000.00

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Memberships	\$0.00	\$0.00	\$0.00
Donations	\$122,000.00	\$246,675.00	\$138,000.00
Foundation Grants	\$50,000.00	\$45,000.00	\$50,000.00
Interest and Investment Income	\$6,000.00	\$5,800.00	\$5,700.00
Parent Organization	\$0.00	\$0.00	\$0.00
Other	\$133,000.00	\$170,000.00	\$109,500.00
Total Revenues by Category	\$713,000.00	\$857,225.00	\$728,200.00

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

Federal government revenue is through the WS DOT for transportation funding. Other revenue is from program fees, congregations, corporations and civic organizations.

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
2016	General	\$15,000.00
2017	General	\$15,000.00
2018	General	\$15,000.00
2019	General	\$15,000.00
2020	General	\$15,000.00

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
Program Services	\$17,500.00	\$253,521.00	Grants, Foundations, Individuals
Salaries and Benefits	\$7,500.00	\$389,500.00	Grants, Foundations, Individuals
Management and General	\$0.00	\$30,179.00	Individuals, Grants
Fundraising	\$0.00	\$55,000.00	Fundraising
	\$25,000.00	\$728,200.00	

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.

Program Services - City investment will allow us to maintain and expand essential services of those aged 60 and over. These include transportation, home repairs and health and wellness programs and activities.

Salaries and Benefit - City investment will support staffing to coordinate and oversee the program services listed above. The salary and benefit costs listed are allocated to Program Services. Therefore, 100% of the City grant will go directly to programs serving older adults with no grant dollars applied to agency management, fundraising or other overhead functions

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.

Not Applicable

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.

Our request for 2022 - 2023 is for \$25,000 as compared to prior grants of \$15,000. Our requests for services have increased substantially over the last five years as have the un-duplicated number of participants served. Likewise, our budget has increased to meet the increased demand. We have also sought to continue service delivery during Covid-19 and been able to successfully maintain service levels.

Grants from other sources are projected to remain rather level and the funding increase is requested to meet the increased demand of the numbers served and the increased demand for services. The same is being requested of the county. State and federal funding remains flat as services for older adults is considered discretionary funding.

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.

Our five year strategic plan indicates confidence in the sources of revenue listed. County funding as well as Federal and State funding for program operations appear solid, but with little increase.

With the growing population of older adults in our city, along with a dedicated staff responsible for volunteer recruitment and sustainability, we are also confident that the volunteer resources will be available going forward.

Over the last five years with support of City funding, we have operated within our revenue and expense budget while our requests for services have increased over 10%. We continue to received funding from the Federal Older Americans Act (through the Area Agency on Aging) for Senior Center operations. Likewise as the county coordinating site for the Seniors' Health Insurance Information Program (SHIIP), we receive annual funding from the NC Department of Insurance.

Our funding through the Federal Transportation Administration's Elderly and Disabled transportation funding through the WS Department of Transportation has decreased which has challenged us as we attempt to respond to the #1 priority of transportation for older adults in our community. We also receive state funding through the EDTAP transportation assistance program for transportation; however, no funding was available in 2021.

Our support from individual giving, corporate and faith community funding has steadily increased over the last 5 years. We also continue to receive grants from local foundation sources for specific project related needs.

Additionally, as evidence of community support, we raised over \$510,000 in addition to our annual budget for capital expenses associated with renovation and maintenance of our facilities during 2016 and 2017.

We have an endowment with the Winston-Salem Foundation. As of September 30, 2021, the value of the endowment is \$156,049 with \$67,375.74 of that value designated as grantable funds which, at the discretion of the board, can be used for operating expenses. Since inception of the endowment, no funds have been withdrawn. In our 2020 strategic planning retreat, the Board of Directors focused, among other initiatives, on growing our endowment to \$250,000.

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.

We have adjusted very well with new operational models during Covid-19. We do not see significant barriers in 2022-2023, other than the potential reduced use of volunteers.

Potential barriers we may face are sustaining operating revenue and volunteer resources; however, these resources appear to be firm for the next fiscal year. We continually seek funding from individuals, program and operating grants, successful fundraising events and reasonable program fees.

Our five year strategic plan indicates confidence in these sources of revenue. With the growing population of older adults in our city, along with a dedicated staff person responsible for volunteer recruitment and sustainability, we are also confident that the volunteer resources will be available for the foreseeable future.

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

At this time, we do not see any institutional barriers to our continued operations.

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:	\$25,000.00
Number proposed to be served for the year:	6,500
Average City funds per beneficiary:	\$3.85
Proposed funds from all sources:	\$728,200.00
Number proposed to be served for the year:	6,500
Average total funds per beneficiary:	\$112.03

F. Required Documents

Completed by smatthews@shepherdscenter.org on 10/21/2021
5:56 PM

Case Id: 14245

Name: Shepherd's Center of Greater Winston-Salem -

Address: *No Address Assigned

F. Required Documents

Please provide the following information.

Documentation

Code of Conduct/Conflict of Interest Policy *Required

Conflict of Interest Policy - Revised 08-2008.pdf

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

Final 990 IRS Approved E-file 10-18-2021.pdf

Organization By-Laws *Required

BYLAWS August 2011.pdf

Articles of Incorporation *Required

Articles of Incorporation.pdf

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

Employee Handbook.pdf

Financial Policy and Procedure Manual.doc

Cash Control Policy.doc

Abuse and Neglect Policy.docx

Conduct & Ethics - Whistleblower Policy.doc

Investment Policy.docx

Records Retention Policy.doc

IRS 501(c)3 Designation Letter *Required

IRS 501c3 Doc.pdf

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

Shepherd's Center Audit 12 31 2020.pdf

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

***Required**

North Carolina Secretary of State Search Results.pdf

Participant/Program Data Sample Report *Required

1st Quarter 2021-2022 Activity Report.docx

Other

2020 Program Summary At a Glance.pdf

2020 Annual Report.pdf

Pop65andOver_ExistingWSTA_RoutesBuffers.pdf

Certificate.pdf

Certificate.pdf

AFF Key Findings Noted with SC Services.pdf

G. Income Based Projects/Services Only

Case Id: 14245

Name: Shepherd's Center of Greater Winston-Salem -

Address: *No Address Assigned

Completed by smatthews@shepherdscenter.org on 10/28/2021
11:23 AM

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 smatthews@shepherdscenter.org on 10/28/2021
11:49 AM

Case Id: 14245

Name: Shepherd's Center of Greater Winston-Salem -

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
--------------	---------	-----------------	-----------	--------------

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**
***No files uploaded*

Participant/program data sample report ***Required**
***No files uploaded*

Market study or other analysis to verify the need for the project. ***Required**
We are not applying for this type of funding.pdf

Operating pro forma that includes rent and operating cost assumptions and all estimated loan payments, in electronic format. ***Required**
We are not applying for this type of funding.pdf

I. Emergency Shelter Only

Completed by smatthews@shepherdscenter.org on 10/28/2021
11:25 AM

Case Id: 14245

Name: Shepherd's Center of Greater Winston-Salem -

Address: *No Address Assigned

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	\$0.00
Food	\$0.00
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
	\$0.00

J. Rapid Rehousing and HMIS Only

Completed by smatthews@shepherdscenter.org on 10/28/2021
11:25 AM

Case Id: 14245

Name: Shepherd's Center of Greater Winston-Salem -

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 smatthews@shepherdscenter.org on 10/28/2021
11:25 AM

Case Id: 14245

Name: Shepherd's Center of Greater Winston-Salem -

Address: *No Address Assigned

K. HOPWA

Please provide the following information.

Are requesting funds for a HOPWA project?

No

Submit

Completed by smatthews@shepherdscenter.org on 10/28/2021
12:16 PM

Case Id: 14245

Name: Shepherd's Center of Greater Winston-Salem -

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.

Samuel C Matthews

Electronically signed by smatthews@shepherdscenter.org on 10/28/2021 11:49 AM

IDIS Setup

No data saved

Case Id: 14245

Name: Shepherd's Center of Greater Winston-Salem -

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