COMMUNITY AGENCY ORIENTATION WORKSHOP

City of Winston-Salem FY 2023-24 Community Agency Funding Process
Orientation Workshop
October 20, 2022
OVERVIEW

I. Welcome and Introductions
II. Public Hearing – Federal Housing Funds
III. FY 2023-24 Application Process
  - RFP, Eligibility, Funding Sources, Online Application
IV. Review Process
V. Important Dates
VI. Questions
Winston-Salem/Forsyth County Housing Consortium
Consolidated Housing and Community Development Plan
I. Program Overview and Outlook
   ▪ Mellin L. Parker, Community Development

II. Status of Program Activities
   ▪ Fair Housing Adolfo Briceno, HR/DEI
   ▪ Redevelopment & Housing Production Diane Greer, CD
   ▪ Economic Development Steven Harrison, BIA
   ▪ Forsyth County Housing Programs Ashley Pendley, CED
   ▪ Homeless/HOPWA Programs Shereka Floyd, CD
   ▪ Housing Rehabilitation Doug Moore, CD
   ▪ Housing Authority Kevin Cheshire, HAWS

III. Comments, Questions, & Answers
    ▪ Mellin L. Parker, Community Development
FY 2023-24 Request for Proposals

- RFP and application for funding during the period from July 1, 2023 to June 30, 2024

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

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

- Applications due Friday, November 18, 2022 by 5:00 pm
ELIGIBILITY REQUIREMENTS

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

- Not be debarred or suspended by any federal agency

- Financial Review/Audit Requirement
  - Submission of third-party review or audited financial statements prepared by a qualified accountant or accounting service covering the last reporting period of operation. Audit findings may make the applicant ineligible to receive assistance from the City.

- Federal Housing Funding – Audit Requirements
Your completed application should also include:

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

These will all be uploaded in Section F – Required Documents
SEED FUNDING

- **Purpose:**
  Broaden city financial assistance to increase the capacity of local non-profits to meet the community’s needs

- **Available to agencies that do not meet eligibility requirements for established funding process**

- **Short-term: limited to 2 funding cycles**

- **Requirements**
  - Capacity building training
  - Reporting
FUNDING SOURCES

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

- Activities benefit low and moderate income individuals
  - Decent affordable housing
  - Services and facilities
  - Create jobs
HOME Investment Partnership (HOME)

- Affordable housing projects and programs
  - Buying, building, or rehabilitating affordable housing
  - Rental or homeownership
  - Rental assistance
  - Activities benefit low-income individuals
Emergency Solutions Grants (ESG) and Homeless Management Information Systems (HMIS)

- Funding for programs to serve the homeless
  - Emergency shelters and supportive services
  - Rapid re-housing
Housing Opportunities for Persons With AIDS (HOPWA)

- Activities benefit low and moderate-income individuals living with HIV/AIDS
  - Tenant-Based Rental Assistance (TBRA)
  - Short-Term Rent, Mortgage, and Utility (STRMU) Assistance
  - Permanent Housing Placement (PHP)
  - Separate application for FY23-24
FUNDING SOURCES (Continued)

Housing Finance Assistance Fund (HFF)

- Buying, building, or rehabilitating affordable housing
- Other public services
FUNDING SOURCES (Continued)

Occupancy Tax

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

General Fund

- Community arts and sciences agencies
- Broad-based support, city-wide
Successful Outcomes After Release (SOAR)

1. City Job Training/Placement Program
2. Grantee Agency Funding
   - Educational, vocational, therapeutic, and employee training programs
   - Specifically for programs serving formerly incarcerated individuals
   - Programs that reduce recidivism
FY 2023-24 APPLICATION

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

- http://www.cityofws.org/335/Contributions-to-Non-Profit-Entities

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

Section A – Organization & Contact Information
Section B – Project Overview
Section C – Strategy and Performance
Section D – Organizational Capacity
Section E – Cost Effectiveness
Section F – Required Documents
For Community Development Proposals ONLY (CDBG, HOME, and/or ESG funding):

Section G – Social Serv/Poverty Reduction Only
Section H – Construction/Rehab Only
Section I – Emergency Shelter Only
Section J – Rapid Rehousing and HMIS Only
Register to access your organization’s application
- https://portal.neighborlysoftware.com/winston-salem/participant
### FY 2023-24 APPLICATION (Continued)

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

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**Good Morning, Sarah!**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Agency Funding</td>
<td>Select this option if you are a non-profit applying for Community Agency funding.</td>
<td>[Click here to start a new application]</td>
</tr>
<tr>
<td>Owner Occupied Rehab</td>
<td>Select this option if you are a homeowner applying for Winston-Salem’s Owner Occupied Rehabilitation program.</td>
<td>[Click here to start a new application]</td>
</tr>
<tr>
<td>Down Payment Assistance</td>
<td>Select this option if you are applying for down payment assistance.</td>
<td>[Click here to start a new application]</td>
</tr>
</tbody>
</table>
FY 2023-24 APPLICATION (Continued)

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

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Community Agency Funding Application

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

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Application

Please use the link below to continue the application process.

Technical issues? Contact support@neighborlysoftware.com.

Click here to continue
FY 2023-24 APPLICATION (Continued)

- At the end of each section, click “Complete & Continue” to move to the next section
- As long as the application has not been submitted, you can reopen sections to change responses
### FY 2023-24 APPLICATION – PERFORMANCE MEASURE TABLE

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

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

**FY 19-20 Program Accomplishments:**

**FY 21-22 Key Objectives:**
The RFP has additional information about types of performance measures in Exhibit A.

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

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

  **Workload Measures** indicate the quantity of work completed by an organization.
  - Number of people served
  - Hours of counseling provided
  - Art inventory maintained and displayed

  **Efficiency Measures** indicate how productive an organization is at providing a project/program.
  - Cost to organization per person served
  - Revenue as a percent of total cost of operation
  - Cost to organization per workshop provided

  **Effectiveness Measures** indicate whether the activities of an organization are achieving the desired outcomes; or indicate the quality of service provided.
  - Percentage of public school students receiving two hours of racial diversity training
  - Number of case management clients maintaining housing after 6 months
  - Grade Point Average increase over prior semester
PERFORMANCE MEASURES 101

https://youtu.be/2XdJFTBtSwk
## FY 2023-24 APPLICATION - BUDGET

### Expenditures by Program

<table>
<thead>
<tr>
<th>Program Services</th>
<th>Budgeted FY 21-22</th>
<th>Projected Actuals FY 21-22</th>
<th>Proposed Budget FY 22-23</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>800,501</td>
<td>815,122</td>
<td>865,120</td>
</tr>
<tr>
<td>Fundraising</td>
<td>650</td>
<td>650</td>
<td>650</td>
</tr>
<tr>
<td>Management and General</td>
<td>252,960</td>
<td>250,911</td>
<td>255,400</td>
</tr>
</tbody>
</table>

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

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

### Expenditures by Category

#### Personnel

- Employee Salaries and Wages: 590,651
- Employee Benefits: 236,260
- Subtotal, Personnel: 826,911

#### Operating Expenditures

- Facility Rent and Utilities: 112,020
- Training and Conference Registration: 2,500
- Memberships and Dues: 2,750
- Travel and Transportation: 13,298
- Grants To Individuals and Organizations: 48,150
- Contracted Fundraising Services: 0
- Goods Purchased for Resale: 0
- Other Contracted Services: 30,150
- Other Operating Expenditures: 18,332
- Subtotal, Operating Expenditures: 227,200

#### Capital Outlay

- Total Expenditures (Should match Total Expenditures by Program): 1,054,111

### Revenues by Category

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

This breakdown of expenditures should come from your IRS Form 990.
Total Possible Grant Application Score:

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

100 points
APPLICATION REVIEW PROCESS

December 2022
- Review Panels

January – April 2023
- Community Agency Allocation Committee (CAAC) Review Meetings

April 2023
- Community Development/Housing/General Government Committee – Recommendations presented for Federal Housing Funds

May 2023
- City Manager’s Proposed Budget for FY 2023-24 to Mayor and City Council

June 2023
- Mayor & Council approve budget, including allocations to community agencies
COMMUNITY AGENCY ORIENTATION WORKSHOP

IMPORTANT DATES

- Technical Workshop
  - Provide application assistance and answer any questions
  - Thursday November 3, 2:00 pm
  - Virtual through Zoom

- Application Deadline
  - Friday, November 18, 2022
  - No later than 5:00 p.m.
  - Submit application and all supporting documents online

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

Budget Page (RFP and link to application):
http://www.cityofws.org/335/Contributions-to-Non-Profit-Entities

Online Application:
https://portal.neighborlysoftware.com/winston-salem/participant

Strategic Plan:
http://www.cityofws.org/216/Strategic-Planning

Performance Measures 101 Video:
https://youtu.be/2XdJFTBtSwk
CITY OF WINSTON-SALEM CONTACTS

Budget and Evaluation Office
Rene’ Williams
(336) 747-7094
communityagencies@cityofws.org

Police Department - SOAR
Dr. Pam Peoples-Joyner
(336) 773-7962
pjoyner@wspd.org

Community Development Department
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sherekaf@cityofws.org
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Marla Newman
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