

A. Organization & Contact Information

Case Id: 16171
Name: Old Salem 2023-2024 - 2023/24
Address: *No Address Assigned

Completed by mcook@oldsalem.org on 11/10/2022 2:59 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

Old Salem, Inc.

A.2. Project/Program

Operating Support

A.3. FY 2023-24 Funding Request Amount

\$220,000.00

A.4. Agency's Total Operating Budget

\$4,753,021.00

A.5. Mailing Address

600 South Main Street Winston-Salem, NC 27101

A.6. Project/Program Location Address

600 South Main Street Winston-Salem, NC 27101

A.7. Organization Website

www.oldsalem.org

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

1950

A.9. Organization Fiscal Year

January 1 - December 31

A.10. Federal Tax ID Number

56-0587289

A.11. Federal DUNS Number

049844830

EXECUTIVE DIRECTOR/MANAGER

A.12. Name, Title

Mr. Terry G. Taylor, President & CEO

A.13. Email

ttaylor@oldsalem.org

A.14. Phone

(336) 721-7316

CONTACT

A.15. Name, Title

Michelle M. Cook, Sr. Director of Development

A.16. Email

mcook@oldsalem.org

A.17. Phone

(336) 721-7331

BOARD CHAIR

A.18. Name

G. William Joyner, III

A.19. Term Expiration

06/30/2023

A.20. Email

wijoyner@kilpatricktownsend.com

A.21. Phone

(336) 607-7342

B. Project Overview

Completed by rbarron@oldsalem.org on 11/17/2022 8:52 PM

Case Id: 16171

Name: Old Salem 2023-2024 - 2023/24

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?

Old Salem Museums & Gardens is one of the most important tourism destinations for Winston-Salem. It is also a tremendous historical and cultural resource for visitors and for schools within a two-hour driving distance. Before the pandemic, Old Salem attracted as many as 400,000 total visitors annually from 20 countries and every state in the U.S. A 2018 survey funded by Visit Winston-Salem found that of the 2,600 visitors surveyed, 76% cited "historic" as their primary description of Winston-Salem as a whole. This was consistent among all age groups, from Generation Y through the Greatest Generation. "Mix of old and new" was the second highest descriptor, cited by 53 percent.

For decades, however, Old Salem neglected telling the stories of the estimated 135 enslaved individuals who lived and worked in the community and made enormous but unsung contributions. These individuals played significant roles in building the town's original structures as well as cleaning, cooking, and tending gardens and livestock for the Moravian families. Some assisted the craftspeople who fueled the economy of the town and became very skilled in their own right. It is estimated that two-thirds of the plants that the Moravians relied upon for food were from seeds given to them by Africans and Native Americans. Seeds from these heirloom plants are housed in a Seed Saving Laboratory that is open to the public.

Old Salem's Hidden Town Project seeks to greatly expand and diversify the Old Salem story, and thus, the story of Winston-Salem's origin. While Old Salem has made progress in including stories of enslaved individuals in exhibits and tour narratives, there is still much to be done, particularly in refurbishing buildings that were important to the story. Old Salem is a rare historic treasure that can visually demonstrate what life in the 18th and 19th centuries was like for all citizens, and it is important that these buildings be brought online for tourists. These repairs and renovations are well beyond the current budgetary capabilities of Old Salem. Most people do not realize that the ticket price to Old Salem covers less than 20% of the cost per visitor involved in operating and maintaining an historic district. The cost of maintaining and repairing/restoring/renovating historic buildings -- even those open currently to the public -- was substantial even before the current inflationary environment and supply chain issues. In addition, the pandemic struck a major economic blow to Old Salem, which was closed to tourists for a year, then reopened on a limited basis. At the same time, OSMG's cost-cutting measures included eliminating all marketing and advertising efforts except for social media. While visitors and school groups are beginning to return, visitation numbers are 51% of what they were before the pandemic.

Requests for funding for the infrastructure needs were included in our application for second-round ARPA funding from the County, but these needs were funded only at 50%. While we are grateful for the County's support, there are still many restoration/repair needs that need to be addressed.

Old Salem is requesting funds from the City to assist with repair and restoration of several Hidden Town buildings as well as assistance with a strategic marketing and advertising program that will target print, outdoor and public radio advertising within a two-hour driving radius.

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

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from participation?

Telling the story of the enslaved in Salem is an important step in making OSMG a more relevant living history for people of all races, socioeconomic levels and ages. OSMG has purposefully kept its admission prices low and affordable for everyone, including underserved communities, but the current facilities do not adequately tell the story of ALL citizens who lived and worked in Salem. Telling this story more thoroughly will only increase our visitation, our effectiveness as a major tourism draw for Winston-Salem, and our appeal to local and visiting Black individuals and groups.

Some private, charter and public schools within a two-hour driving radius have already returned for group tours. Old Salem is placing a particular emphasis on getting Title 1 schools to come to the district for field trips after a two-year disruption due to COVID concerns.

In addition, Old Salem has made important strides in making its educational programs diverse, inclusive, and truly representative of the many individuals who lived in the town of Salem. We have also made significant efforts to make history "living" and tangible through creating more hands-on experiences as part of the tour.

A visit to Old Salem leaves a lasting impression that extends far beyond what students experience from reading a book or hearing a classroom lecture. Studies have shown that such experiences increase students' learning, critical thinking skills, and "historic empathy" for those who lived many years ago -- and that minority children in particular realized the most benefits.

From a quantitative viewpoint, we expect visitor numbers to increase, particularly among Black adults and youth who would find these additional narratives of the enslaved to be particularly relevant to their own lives.

None of the facilities for which funding is requested are currently open to the public with the exception of the Blum House, which includes a woodworking shop. Assistance from the City will allow us to open these buildings for official tours.

OSMG is also requesting funds to restart a proactive marketing and advertising program. A number of board members and supporters have complained that potential visitors throughout the region need to be reminded that Old Salem is here, and some have said they believe even local residents do not realize that Old Salem is open again. Because of cuts to the marketing budget, even donors and supporters have received almost no printed communication from OSMG in several years. Many of OSMG's largest donors are older adults who do not want to read email newsletters online, do not use email at all or follow social media. Old Salem recently started a print newsletter, The Insider, which is being mailed to about 800 supporters and key constituents every two months. The newsletter has already been very enthusiastically received.

NEED (7 POINTS)

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

Hidden Town structures include the replica of the original St. Philips log church, the Tavern Barn, the Volz Barn and the former Tavern. All are in dire need of major structural repairs and renovations in order to preserve their integrity and to become sites suitable for tourists.

St. Philips is the African and African-American Moravian congregation organized in Salem in 1822 among a mostly enslaved population and is the only historic African-American Moravian congregation in the U.S. These worshippers used the log church from 1823 until 1861. The original church was eventually torn down, but extensive Moravian records allowed it to be recreated.

The Blum House was the home of John Christian Blum and four enslaved individuals, including one man who helped Blum in his print shop despite a national prohibition against teaching the enslaved to read and write. The Volz Barn and the Tavern Barn were both locations where the enslaved worked and sometimes slept. Visitors coming to the town to purchase goods often spent the night in the Tavern and brought along their enslaved assistants, who would have slept in the uppermost floor of the Tavern or in one of the barns.

The restoration of additional buildings beyond those currently on the visitor tour always requires a separate fundraising

effort through foundation grants and appeals to individual donors. Similar historic destinations make up some of their costs through higher ticket prices. A ticket to Colonial Williamsburg, for example, costs \$46.99 per adult and \$26.99 per student, compared to \$20 for adults and \$12 for students for Old Salem. The Old Salem board has chosen to keep OSMG at lower ticket prices in order to be more accessible to the public, making up gaps with private fundraising efforts and draws on the endowments of MESDA and Old Salem. In the last five years, however, the Old Salem board, former President/CEO Frank Vagnone and (former COO) current President Terry Taylor have sought to better secure the future of OSMG by reducing to 5% (from a high of 25% several years ago) the annual draw on the endowment corpus.

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?

Old Salem is grateful for our ongoing collaboration with the City and the County, both in annual disbursements and through ARPA funding. As we have for years, we will continue to seek support from private donors and foundations for needs that are beyond the City's and County's ability to fund. Old Salem is also working closely with Visit Winston-Salem, which has generously agreed to give Old Salem a very visible role in its own marketing efforts. Wells Fargo has recently agreed to be a top sponsor of our upcoming Design Seminar this spring, enabling us to promote this conference to a larger market. When possible, Old Salem contracts with local tradespeople to perform restorations and repairs and sources lumber and other supplies from local and regional vendors, sometimes reclaiming wood from structures that are being torn down. A portion of our marketing budget will also be spent locally through vehicles such as Winston-Salem Magazine and public radio.

C. Strategy and Performance

Completed by rbarron@oldsalem.org on 11/17/2022 8:55 PM

Case Id: 16171

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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):

Economic Vitality and Diversity

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 results of the repair and restoration projects for which we are requesting funding will be visible and tangible. The Visitor Center is able to track numbers of visitors through ticket purchases.

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

Old Salem's intention is to complete the repair/restoration projects by the end of 2023. We will be able to update the City on progress at any time. As mentioned before, we will actively solicit funding from private individuals and foundations to cover the cost of projects not fully funded by the City and County. Also, proceeds from the recent sale of the Coca Cola plant and several other properties will be set aside exclusively for ongoing repairs and maintenance in the future.

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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 21-22 Previous Year Results	FY 22-23 Current Year Projected Results	FY 23-24 Next Year Anticipated Results
Complete restoration and repair work for Hidden Town projects, which include the Tavern and Tavern Barn, Volz Barn, Blum House, and the original St. Philips Log Church replica.	Old Salem will use existing staff and skilled contractors to perform repairs appropriate to a historic district.	N/A	Repairs to be completed by end of calendar year 2023	Repairs to be completed by end of calendar year 2023
Increase marketing presence in the region within a two-hour drive from Old Salem.	Advertising options include public radio in the Triad, Charlotte and Raleigh metro areas; suitable print publications or websites in the three regions; billboards in highly visible locations in these markets; and trade publications targeting visitors specifically interested in Southern historical collections such as those at MESDA	N/A	If funded, advertising will be placed using vehicles described in the program activities column by end of calendar year 2023	If funded, advertising will be placed using vehicles described in the program activities column by end of calendar year 2023

	Total Unduplicated Number Served	Total Number Served
FY 21-22 Previous Years Results	0	34,350

FY22-23 Current Year Projected Results	0	16,408
FY 23-24 Next Year Anticipated Results	0	32,632

C.6. FY 21-22 Program Accomplishments

- Expanded Learning in Place educational programming. In addition to our onsite group tours, Learning in Place provides digital lesson plans and classroom resources for teachers and students. All of these lesson plans are free to use and available on our website.

* Reopened partially, then fully, to the public, necessitating the hiring/rehiring of personnel to staff and interpret the facilities.

- Completed ongoing restoration and repair work throughout the historic district. Our master craftsmen and volunteers have completed over 60 distinct restoration projects on 17 sites. These included painting projects and more limited repairs other than the major Hidden Town projects described earlier for which we are requesting funding.

- Conducted new research on southern furniture, ceramics, textiles, silver, and more. After nearly 50 years of work, the number of craftspersons in the MESDA Craftsman Database is nearing 100,000. We have also been adding to the MESDA Journal with articles on Piedmont, North Carolina piano making, Kentucky Samplers, and more. The MESDA collection also expanded to include historic objects and research from Alabama.

- Continued Community outreach through our Victory Garden and bread baking initiatives. Working with Second Harvest Food Bank, Hope Winston-Salem and other community programs, Old Salem has donated over 6,000 pounds of vegetables, and almost 26,000 loaves of bread and other baked goods to support our neighbors experiencing food insecurity.

C.7. FY 22-23 Key Objectives

1. Rebuild staffing levels from 74 to between 100-110: Full-time and temporary/part-time staff has grown to 95; approximately 50% of the staff are full time employees.
2. Gradually re-open buildings that were closed because of COVID: Old Salem continues to take a phased approach to re-opening buildings that were closed because of COVID. The following buildings are now open, some with limited hours: The Visitor Center, Frank L. Horton Museum Center, Blum House Joinery, Potter's Workshop at T. Bagge, Moravian Book and Gift, Single Brothers House, Boys School, Miksch House and Garden, Winkler Bakery, Seed Saving Lab.
3. Provide at least 30 new events and workshops: We continue to make progress against this objective, hosting workshops and seminars that were postponed during COVID and developing new events and workshops.
4. Continue to provide produce and bread as an outreach to food insecure neighbors across our community: We continue to grow vegetables and produce bread and other baked goods that we distribute through partnerships with Second Harvest Food Bank, HOPE Winston-Salem and Sunnyside Ministry.
5. Restructure our programming to provide both online and in-person events and workshops: We are now offering a virtual option for all conferences and seminars. Additionally, we provide online resources for educators, including lesson plans and student activities, that teachers can access, free of charge, on the Old Salem website.

D. Organizational Capacity

Completed by rbarron@oldsalem.org on 11/17/2022 10:34 AM

Case Id: 16171

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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?

Old Salem, Inc. is a living history site incorporated in 1950 to tell the story of early settlers living in and around Salem, a Moravian town founded in the NC backcountry in 1766. Old Salem is comprised of the Town of Salem, the Museum of Early Southern Decorative Arts (MESDA), the Gardens of Old Salem, and Old Salem business enterprises, including Winkler Bakery and Moravian Book and Gift Shop.

Old Salem shares the rich, authentic, and diverse cultural history of the early South—with special emphasis on the Moravians in North Carolina, enslaved and free people of African descent, and Indigenous peoples of the Southern Woodland, through the preservation and interpretation of material culture, architecture, and cultural landscapes. As an organization, Old Salem considers its mission to provide content and assistance in ways that fill community needs.

Old Salem is recognized as a National Historic Landmark and accredited by the American Association of Museums.

FUNCTION (5 POINTS)

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

For 72 years; Old Salem was incorporated in 1950

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

Old Salem Museums & Gardens is the birthplace of the city we now know as Winston-Salem. It is one of the most important tourism destinations for the city and a tremendous historical and cultural resource for visitors and schools within a two-hour driving distance. Before the pandemic, Old Salem attracted as many as 400,000 total visitors from 20 countries and every state in the U.S. and as many as 40,000 students on group tours from within Forsyth County and the region.

A 2018 survey funded by Visit Winston-Salem found that 76% of the 2,600 visitors surveyed cited “historic” as their primary description of Winston-Salem as a whole. This was consistent among all age groups, from Generation Y through the Greatest Generation. “Mix of old and new” was the second highest descriptor, cited by 53 percent. Year round, Old Salem is a top destination for local residents, much like a local park. On any given day, people can be seen exercising, walking dogs, enjoying the beautiful grounds, and shopping at the Moravian Gift and Book Store and Winkler Bakery.

The Museum of Early Southern Decorative Arts (MESDA) is the preeminent center for the research and study of Southern decorative arts and material culture. MESDA is home to the most comprehensive collection of southern decorative arts and related research resources in the country. The museum is internationally recognized for its contributions to the study and understanding of the history, decorative arts, and material culture of the American South.

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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
President & CEO	Working with 15-member leadership team and board of trustees: develops programming and initiatives that support Old Salem's mission and vision. Develops long and short term strategies; establishes goals and objectives designed to achieve these strategies	40	0.00 %
Controller	Responsible for administering Old Salem's financial enterprise. Manages accounts receivable/ payable; grant funding, endowment management, etc. Provides oversight of all accounting operations related to the City appropriation.	40	0.00 %
Director of Facilities	Will assist Manager of Restoration in making repairs/restorations and/or contract with qualified companies to make them.	40	0.00 %
Manager of Restoration	Will supervise the repairs/restorations to historic structures and contract with qualified companies to make them.	40	0.00 %

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
Terry G. Taylor	President & CEO	\$135,000.00	0.00 %
Daniel K. Ackermann	Chief Curator	\$101,000.00	0.00 %
Michelle M. Cook	Senior Director of Development	\$100,000.00	0.00 %
Tammy Everhart	Controller	\$85,000.00	0.00 %
Nicole Blalock	HR Director	\$70,000.00	0.00 %

D.6. Attach an organizational chart**Organizational Chart *Required**

Organization Chart OSMG November 2022.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:

Old Salem, Inc. recognizes that people are its most important resource. It is only through employees' integrity, talent,

and commitment that we can provide high quality services. Old Salem, Inc. is committed to hiring, developing, and utilizing diverse talents from around the globe.

Old Salem recruits, employs, trains, promotes and compensates its personnel without regard to race, age, sex, religion, national origin, citizenship, marital status, veteran's status, disability, genetic information, sexual orientation, gender identity, or any other personal characteristic protected by law.

Old Salem is committed to the following practices to ensure diverse hiring practices and candidate pools:

1. Review hiring practices to eliminate systemic bias and racism across all levels of the organization.
2. Adopt aggressive recruiting practices to be more inclusive of the communities surrounding Old Salem and MESDA.
3. Advertise employment opportunities across a wide range of communication platforms to reach a more diverse candidate pool.
4. Create a career path for all positions to allow for growth within the organization.
5. Provide educational opportunities to promote the professional and personal growth and development of all staff.
6. Provide, at minimum, a living-wage for all full-and part-time employees (based upon local cost of living data).
7. Benchmark salary ranges and pay grades across multiple sources to keep pay scales appropriately related and equitable across the entire organization.

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	3	0	0	10	2	2
Professionals	5	0	0	5	0	0
Technicians	1	1	0	1	1	2
Office/Clerical	0	0	0	0	1	0
Laborers/Service Workers	3	1	0	7	3	2
Total Full-Time	12	2	0	23	7	6

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	0	0	1	0	0
Technicians	0	0	0	0	0	0
Office/Clerical	0	0	0	4	1	0
Laborers/Service Workers	8	0	0	29	1	1
Total Part-Time/Temp	8	0	0	34	2	1

D.8.



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

Board of Trustee ROSTER PUBLIC DISTRIBUTION 2022-2023.docx

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

4

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

5

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.

This is not an application for new funding. Old Salem has been fortunate to receive support from the City for a number of years.

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 most pertinent example of Old Salem's ability to respond to unforeseen events has been the COVID -19 pandemic, which forced OSMG to close to the public for a year. The closure also meant the unfortunate dismissal of over 70 employees. In spring 2021, OSMG opened partially with limited hours and a smaller number of buildings. The organization's efforts to right-size led to a more efficient use of existing employees and more intentional booking of tour groups so as not to overtax existing staff on any given day. Although the historic district was closed to tourists, Old Salem continued to expand its role as a virtual educational partner for the community, greatly increasing its online educational plans and video tools for teachers and students from 3rd through 8th grades, with an emphasis on STEM subjects. All of these items remain available, for free, to anyone who wishes to go to the oldsalem.org website. In summer and fall of 2022, Old Salem began preparing to open fully. About 24 staff positions have been or are being filled. Of course, Old Salem employees do much more than simply staff buildings. They must be trained to interpret historical buildings and objects, interact with the public in a positive manner, and answer questions. Old Salem greatly appreciates the City's support, through ARPA funding, toward its efforts to reopen and return to full staffing. Even prior to the pandemic, Old Salem had greatly increased its efforts to build and expand upon relationships with individual donors and foundations. Overall fundraising was up 19%. At the same time, it worked to become more self-sufficient and less dependent upon withdrawals from the endowment corpus and completed a financial plan that resulted in an industry standard 5% annual endowment draw (a 39% decrease in the last 10 years). Thanks to increased fundraising efforts combined with careful stewardship of revenues and charitable gifts, Old Salem is now in the strongest financial position in a number of years.

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)?

Old Salem's non-discrimination policies were outlined above. For visitors, Old Salem offers discounts for veterans and has worked diligently to keep its ticket prices accessible and much less than those of comparable historic museums/districts such as Old Salem. OSMG recently decided to become a member of the Museums for All network, which provides discounted admission for families on the EBT program. Recognizing the economic inequity among public schools, Old Salem has also actively raised money from private donors to pay for bus transportation and admission for students, teachers and chaperones from several Title I schools. We are currently exploring ways to expand this program, including seeking foundation grant funding and more participation from private donors.

E. Cost Effectiveness

Case Id: 16171

Name: Old Salem 2023-2024 - 2023/24

Completed by rbarron@oldsalem.org on 11/17/2022 8:36 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 22-23	Projected Actuals FY 22-23	Proposed Budget FY 23-24
Program Services	\$3,742,545.32	\$3,367,127.00	\$4,127,142.00
Fundraising	\$324,157.00	\$235,214.00	\$288,305.00
Management and General	\$686,339.00	\$810,670.00	\$993,651.00
Total Expenditures by Program	\$4,753,041.32	\$4,413,011.00	\$5,409,098.00

Expenditures by Category	Budgeted FY 22-23	Projected Actuals FY 22-23	Proposed Budget FY 23-24
Employee Salaries and Wages	\$2,452,869.00	\$2,221,915.00	\$2,732,955.00
Employee Benefits	\$506,801.00	\$426,884.00	\$525,067.00
Facility Rent and Utilities	\$397,243.00	\$359,248.00	\$440,874.00
Training and Conference Registration	\$1,575.00	\$468.00	\$575.00
Membership and Dues	\$11,928.00	\$10,762.00	\$13,100.00
Travel and Transportation	\$28,401.00	\$25,923.00	\$25,900.00
Grants to Individuals and Organizations	\$0.00	\$0.00	\$0.00
Contracted Fundraising Services	\$0.00	\$0.00	\$0.00
Goods Purchased for Resale	\$351,478.00	\$379,688.00	\$467,016.00
Other Contracted Services	\$267,194.00	\$297,863.00	\$366,372.00
Other Operating Expenditures	\$735,552.00	\$680,807.00	\$837,239.00
Capital Outlay	\$0.00	\$9,453.00	\$0.00
Total Expenditures by Category	\$4,753,041.00	\$4,413,011.00	\$5,409,098.00

Revenues by Category	Budgeted FY 22-23	Projected Actuals FY 22-23	Proposed Budget FY 23-24
City of Winston-Salem	\$197,710.00	\$197,710.00	\$929,523.00
Forsyth County	\$100,000.00	\$100,000.00	\$100,000.00
State of North Carolina	\$100,000.00	\$100,000.00	\$100,000.00
Federal Government	\$0.00	\$0.00	\$0.00
Admissions/Program Revenues/Sales	\$2,361,737.00	\$2,236,453.00	\$2,518,211.00

Memberships	\$284,052.00	\$198,755.00	\$369,885.00
Donations	\$180,000.00	\$90,004.00	\$180,000.00
Foundation Grants	\$82,764.00	\$25,691.00	\$75,000.00
Interest and Investment Income	\$1,400,196.00	\$1,400,198.00	\$1,117,955.00
Parent Organization	\$0.00	\$0.00	\$0.00
Other	\$46,582.00	\$64,200.00	\$18,524.00
Total Revenues by Category	\$4,753,041.00	\$4,413,011.00	\$5,409,098.00

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

Funds from the sale of the Coca Cola plant and several other properties will be held in a fund to be used exclusively for maintenance and repairs going forward.

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
2022	Administration GF and Occupancy Tax	\$197,710.00
2021	Administration GF and Occupancy Tax	\$197,710.00
2020	Administration GF and Occupancy Tax	\$197,710.00
2019	Administration GF and Occupancy Tax	\$197,710.00
2018	Administration	\$186,520.00

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
Building Repair and Restoration	\$165,000.00	\$391,875.00	Forsyth County ARPA
Increase Marketing Presence	\$55,000.00	\$0.00	
	\$0.00	\$0.00	
	\$220,000.00	\$391,875.00	

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.

For repairs and restoration: Old Salem will use existing staff and skilled contractors to perform repairs appropriate to the historic nature of the buildings listed in this grant request -- the Tavern Barn, Volz Barn, and Blum House

Advertising options include Our State magazine; public radio in the Triad, Charlotte and Raleigh metro areas; suitable print publications or websites in the three regions; billboards in highly visible locations in these markets. Trade publications targeting visitors specifically interested in Southern historical collections such as those at MESDA.

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.

N/A

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.

Repairs and restoration: Old Salem will raise funds through requests to other foundations and individuals. Also, revenues from the sale of the Coca Cola plant and other properties will be set aside in a fund to be used only for repairs and restoration going forward.

Marketing: Old Salem will raise funds through requests to individual donors.

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.

Repairs and restoration: Old Salem will continue to solicit foundations and individual donors for special projects involving restoration of buildings. As mentioned earlier, several properties formerly owned by Old Salem have been sold, and these funds will be used only for repairs and restoration in the future.

Marketing: Future efforts will be funded, we hope, by an increase in revenues from increase in visitation! However, we will not hesitate to ask individual donors if and when funds are needed. We are also returning to a full slate of conferences, for which we regularly solicit sponsorships from individuals, organizations and corporations.

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.

Repairs and restoration: increasing costs for lumber and other building supplies; supply chain disruptions. Old Salem is prepared to continue on with the restorations regardless of these challenges, even if they must continue into 2024. We will keep the City apprised of progress and delays.

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 expect any departures of the key staff involved in supervising the restorations. However, finding suitable contractors qualified to do historic work and waiting for them to be available can cause delays -- as can the availability of supplies. Old Salem will keep the City informed as to whether projects will be delayed beyond 2023.

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:	\$220,000
Number proposed to be served for the year:	32,632
Average City funds per beneficiary:	\$6.74

Proposed funds from all sources:	\$611,875
Number proposed to be served for the year:	32,632
Average total funds per beneficiary:	\$18.75

F. Required Documents

Completed by mcook@oldsalem.org on 11/10/2022 2:49 PM

Case Id: 16171

Name: Old Salem 2023-2024 - 2023/24

Address: *No Address Assigned

F. Required Documents

Please provide the following information.

Documentation

Code of Conduct/Conflict of Interest Policy *Required

Conflict of Interest Annual Statement Old Salem FINAL.pdf

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

Old Salem 990 2021_PublicInspectionTaxDocuments.pdf

Old Salem 2021 990 Signature Page.pdf

Organization By-Laws *Required

OSMG AMENDED AND RESTATED BYLAWS November 2020 FINAL.pdf

Articles of Incorporation *Required

OS Articles of Incorporation-Formation Document.pdf

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

Old Salem Procurement Policy FINAL 05252022.pdf

Cost Allocation Policy May 2022 FINAL 05252022.pdf

IRS 501(c)3 Designation Letter *Required

Old Salem IRS Determination Letter 1994.pdf

Audited Financial statements or third-party review from 2020 and 2021 *Required

2021 OS Regular Audit (1).pdf

Old Salem 2020 Year-End Regular Audit.pdf

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

***Required**

NC Solicitation License Certificate 2022.pdf

Other

***No files uploaded*

G. Income Based Projects/Services Only

Case Id: 16171
Name: Old Salem 2023-2024 - 2023/24
Address: *No Address Assigned

Completed by mcook@oldsalem.org on 11/18/2022 8:35 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 mcook@oldsalem.org on 11/18/2022 8:35 AM

Case Id: 16171

Name: Old Salem 2023-2024 - 2023/24

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.

***No files uploaded*

Participant/program data sample report

***No files uploaded*

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

***No files uploaded*

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

***No files uploaded*

I. Emergency Shelter Only

Completed by mcook@oldsalem.org on 11/18/2022 8:35 AM

Case Id: 16171

Name: Old Salem 2023-2024 - 2023/24

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 mcook@oldsalem.org on 11/18/2022 8:35 AM

Case Id: 16171

Name: Old Salem 2023-2024 - 2023/24

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

Submit

Completed by mcook@oldsalem.org on 11/18/2022 8:36 AM

Case Id: 16171

Name: Old Salem 2023-2024 - 2023/24

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.

Michelle M Cook

Electronically signed by mcook@oldsalem.org on 11/18/2022 8:36 AM

IDIS Setup

No data saved

Case Id: 16171

Name: Old Salem 2023-2024 - 2023/24

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