

**FORSYTH COUNTY**  
**BOARD OF COMMISSIONERS**

9

MEETING DATE: JANUARY 18, 2018 AGENDA ITEM NUMBER: \_\_\_\_\_

**SUBJECT: RESOLUTION ACKNOWLEDGING RECEIPT AND REVIEW OF THE 2018-2019  
COMMUNITY SERVICES BLOCK GRANT APPLICATION FOR FUNDING A  
COMMUNITY ANTI-POVERTY PLAN SUBMITTED BY EXPERIMENT IN SELF-  
RELIANCE, INC.**

**COUNTY MANAGER'S RECOMMENDATION OR COMMENTS:**

**SUMMARY OF INFORMATION:**

ATTACHMENTS:  YES  NO

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_  
COUNTY MANAGER

**RESOLUTION ACKNOWLEDGING RECEIPT AND REVIEW OF  
THE 2018-2019 COMMUNITY SERVICES BLOCK GRANT APPLICATION  
FOR FUNDING A COMMUNITY ANTI-POVERTY PLAN SUBMITTED BY  
EXPERIMENT IN SELF-RELIANCE, INC.**

**WHEREAS**, Experiment In Self-Reliance, Inc. has submitted to the Forsyth County Board of Commissioners a 2018-2019 Community Services Block Grant Application in the amount of \$616,552 for Funding a Community Anti-Poverty Plan for review and comment prior to submission of the said application to the North Carolina Department of Health and Human Services, Division of Social Services, Economic and Family Services Section, Office of Economic Opportunity, pursuant to the provisions of 10A NCAC 97C.0111(b)(1)(A).

**NOW, THEREFORE, BE IT RESOLVED** that the Forsyth County Board of Commissioners hereby acknowledges receipt of the 2018-2019 Community Services Block Grant Application for Funding a Community Anti-Poverty Plan.

**BE IT FURTHER RESOLVED** that the Forsyth County Board of Commissioners has reviewed and discussed the 2018-2019 Community Services Block Grant Application for Funding a Community Anti-Poverty Plan and supports the funding request in order to achieve the long-range goal of moving 180 families in Forsyth County above Poverty Income Guidelines by June 30, 2019 through long-term Success Coaching and direct services to empower economic self-reliance.

**BE IT FURTHER RESOLVED** that the Forsyth County Clerk to the Board is hereby authorized to complete and return the attached Community Services Block Grant (CSBG) Documentation of Submission to County Commissioners form, subject to a pre-audit certificate thereon by the County Chief Financial Officer, if applicable, and approval as to form and legality by the Forsyth County Attorney.

Adopted this 18<sup>th</sup> day of January 2018.



**Community Services Block Grant [CSBG]  
Documentation of Submission to County Commissioners**

Background: The North Carolina Administrative Code [10A NCAC 97C.0111 (b)(1)(A)] requires that each CSBG grant recipient submit its Community Anti-Poverty Plan [grant application] to each County Commissioner Board that it serves.

Instructions: This form is to be completed and notarized by the Clerk to the Board.

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Agency Name: Experiment In Self-Reliance, Inc.

County: Forsyth

Date of Application Submission: \_\_\_\_\_

[Note: This application should be submitted to the County Commissioners at least thirty [30] days prior to application submission to the Office of Economic Opportunity [OEO]. The grant application is due to OEO **February 12, 2018.**

Clerk to the Board should initial all items below.

- \_\_\_\_\_ The agency submitted a complete grant application for Commissioner review.
- \_\_\_\_\_ The Clerk to the Board will be responsible for assuring that the application is distributed to the Commissioners.
- \_\_\_\_\_ Commissioners' comments provided those to the agency. (If applicable)

\_\_\_\_\_  
Clerk to the Board

\_\_\_\_\_  
Date

\_\_\_\_\_  
Notary

\_\_\_\_\_  
Date

# North Carolina Department of Health and Human Services

## Division of Social Services



### Community Services Block Grant Program

**Fiscal Year 2018-19 Application for Funding  
Project Period July 1, 2018 – June 30, 2019  
Application Due Date: February 12, 2018**

Agency Information	
Agency:	Experiment In Self Reliance, Inc
Federal I.D.	56-6060100
DUNS Number:	060296142
Administrative Office Address:	3480 Dominion St., Winston-Salem, NC 27105
Mailing Address (include the 4-digit zip code extension):	PO Box 135, Winston-Salem, NC 27102-0135
Telephone Number:	336 722 9400
Fax Number:	336 748 8312
Board Chairperson:	David Clayton
Board Chairperson's Address: (where communications should be sent)	PO Box 135 Winston-Salem, NC 27102-0135
Board Chairperson's Term of Office (enter beginning and end dates):	1-13-2016 to 02-28-2018
Executive Director:	Twana Wellman-Roebuck
Executive Director Email Address:	<a href="mailto:twana.roebuck@eistr.org">twana.roebuck@eistr.org</a>
Agency Fiscal Officer:	Debra Perkins
Fiscal Officer Email Address:	<a href="mailto:debra.perkins@eistr.org">debra.perkins@eistr.org</a>
CSBG Program Director:	Fred Bazemore
CSBG Program Director Email Address:	<a href="mailto:fred.bazemore@eistr.org">fred.bazemore@eistr.org</a>
Counties Served with CSBG funds:	Forsyth
Agency Operational Fiscal Year:	July 1, 2017 – June 30, 2018

North Carolina Department of Health and Human Services  
Office of Economic Opportunity – Melvin L. Williams, Jr., Director  
2420 Mail Service Center / Raleigh, North Carolina 27699-2420

### Checklist to Submit a Complete Community Services Block Grant (CSBG) Application

Please put a check mark in the appropriate box to show that you have included the completed document with your application. All documents are required with the exception of those that say "if applicable."

Item	Included (√)
Signed Application Certification (blue ink only)	
Signed Board Membership Roster (blue ink only)	
Board of Directors Officers and Committees	
Planning Process Narrative	
Form 210 – Agency Strategy for Eliminating Poverty	
Form 212 – One-Year Work Program	
Monitoring, Assessment and Evaluation Plan	
Form 212A – CSBG Administrative Support Worksheet (if applicable)	
Form 225 – Agency Budget Information	
Form 225N-Budget Narrative	
<b>Appendices (to be attached by the Applicant):</b>	
• Organizational Chart (do not include names)	✓
• Job Description and Resume for the Agency's Executive Director	✓
• Job Description and Resume for the Agency's Chief Financial Officer	✓
• Job Descriptions for all CSBG employees (do not include names)	✓
• Affirmative Action Plan	✓
• Documentation of Public Hearings for Initial Planning Process:	
Copy of Public Notice(s) from Newspaper(s)	✓
Agenda of Public Meeting(s)	✓
Copy of Attendance Sheet(s)	✓
Minutes of Public Meeting(s)	✓
• Documentation for Notice of Intent to Apply:	
Copy of advertisement(s) (need invoice)	
• Documentation of Submission to County Commissioners:	
Notarized document from county clerk	
Commissioners' comments or minutes (if applicable)	
• Cognizant-Approved Indirect Cost Agreement	
• Copy of the Proposal Application submitted to the cognizant agency for approval of the Indirect Cost Rate	
• Cost Allocation Plan (if applicable)	
• Vehicle Registrations (must be up-to-date and after July 1, 2018)	
• State Certification-No Overdue Tax Debts	
• State Certification-Contractor Certification required by N.C. Law	
• Federal Certifications	
• Cost Allocation Plan Certification	
• Federal Funding Accountability and Transparency Act (FFATA)	
• Central Contractor Registration(CCR) (must be up-to-date and after July 1, 2018)	
• IRS Tax Exemption Verification- verifies the agency's 501 (c) (3) status (must be dated after July 1, 201	
• Conflict of Interest Policy (must have been approved within the past 5 years and must be notarized)	
• Contractual Agreements/leases (must be current within contract period)	

**Community Services Block Grant Program  
Fiscal Year 2017-18 Application for Funding  
Certification and Assurances**

**Public Hearing on the Initial Plan**

We herein certify that a public hearing as required by 10A NCAC 97B .0402 Citizen Participation in the Application Process occurred on November 18, 2015 for the initial planning process for the agency's current project plan and the agency has maintained documentation to confirm the process of the public hearing.

For multi-county providers, indicate the date and the county the hearing was held.

Date	County	Date	County

**County Commissioners' Review**

We herein certify that the application for this project period was submitted to the Board of County Commissioners for review and comment on December 20, 2017 as required by 10A NCAC 97C .0111(b)(1)(A).

For multi-county providers, indicate the county and date the application for funding was presented to the Board of County Commissioners as required by 10A NCAC 97C .0111(B).

Date	County	Date	County

**Board of Directors Approval of the Application**

I hereby certify that the information contained in the attached application is true and the Board of Directors has reviewed and approved this application for the Community Services Block Grant Program.

Date of Board Approval: December 13, 2017

Board Chairperson:  12-13-17  
 (Signature) (Date)

Finance Committee Chairperson:  12-13-17  
 (Signature) (Date)

### Board of Directors' Membership Roster

Total Seats Per Agency Bylaws		21	Total Current Vacant Seats		0	
Total Number of Seats Reserved for Each Sector	Poor	7	Public	7	Private	7
Total Number of Vacant Seats Per Each Sector	Poor	0	Public	0	Private	0

Name	County of Residence	Community Group/ Area Represented	Date Initially Seated [month/year]	Number of Terms Served [completed]	Current Term Expiration [month/year]
<b>Representatives of the Poor</b>					
1. Naomi S. Blackmon	Forsyth	Southside	09/09/2015	0	09/30/18
2. Marsha Davis	Forsyth	Veterans	09/09/2015	0	09/30/20
3. Minnie Ervin	Forsyth	Gilmer, Bon-Air, 28th	04/01/2014	1	04/30/20
4. <b>Mary Ford*</b>	<b>Forsyth</b>	<b>Thurmond</b>	<b>12/14/2011</b>	<b>1</b>	<b>12/31/17</b>
5. Eva Gray-Allen	Forsyth	North Winston	09/14/2011	1	09/30/20
6. Amatullah Saleem	Forsyth	Alder Pt.	01/09/2013	1	01/31/19
7. Jose Perez, Jr.	Forsyth	Homeless Council	01/13/2016	1	04/30/2020
<b>Public Elected Officials</b>					
1. Gloria M. Samuels	Forsyth	City	09/14/2014	0	9/2019
2. Tonya Bellanger	Forsyth	City	12/14/2016	0	12/2019
3. Brian P. Burley	Forsyth	County	09/14/2014	1	09/30/20
4. Phillip Carter Sr.	Forsyth	County	09/14/2014	1	09/30/20
5. Chester David	Forsyth	County	09/11/2013	1	09/30/19
6. LaMonica Sloan	Forsyth	City	11/14/2012	1	11/30/18
7. Adam Neiburg	Forsyth	City	05/13/2015	0	03/30/19
<b>Representatives of Private Organizations</b>					
1. Rebecca Bender	Forsyth	Hanes Brands	02/11/2015	0	02/28/18
2. LaShun Huntley	Forsyth	Southside United HealthCare Centers	11/18/2015	0	11/30/18
3. <b>David Clayton*</b>	<b>Forsyth</b>	<b>Winston-Salem Police (Retired)</b>	<b>02/13/2013</b>	<b>1</b>	<b>01/31/18</b>
4. Robert Paul Hinshaw	Forsyth	FTCC/Workforce Development	04/09/2017	0	04/30/20
5. David Myers	Forsyth	Wake Forest	11/18/2015	0	11/30/18
6. Laura Leigh Oyler	Forsyth	Reynolds	10/14/2015	0	10/30/18
7. Katie Ann Lefelar	Forsyth	Reynolds	09/14/2017	0	09/30/20

The signature of the Board of Directors Chairperson certifies that the persons representing the poor were selected by a democratic process and that there is documentation on file that confirms the selection of all board members. In addition, by signing below, the Board of Directors Chairperson confirms that the selection of all board members coincides with the directives outlined in the agency's bylaws and that a current Board of Directors Member Profile is on file for each member.

  
 Board of Directors Chairperson

**\* Mr. Clayton will be replaced in January 2018 by a new private interest representative (outreach is in progress); Ms. Ford will be replaced by neighborhood election as soon as possible. Arrangements for elections are in progress as of 12-7-17.**

### Board of Directors' Membership Contact Listing

Board Member	Physical Address	Email Address
Naomi S. Blackmon	1450 Salem Lake Road Winston-Salem, NC 27107	nsblackmon@att.net
Marsha Davis	174 Motor Road Winston-Salem, NC 27105	Marsha.Davis@va.gov
Minnie Ervin	111 W. 28 <sup>th</sup> Street Winston-Salem, NC 27105	
Mary Ford	1300 Woodruff Glen Drive Winston-Salem, NC 27105	Poford2001@yahoo.com
Eva Gray-Allen	418 East 15 <sup>th</sup> Street Winston-Salem, NC 27105	evagrayallen@gmail.com
Amatullah Saleem	4363 Carrie Avenue Winston-Salem, NC 27105	amatullah.Saleem31@yahoo.com
LaShun Huntley	3009 Waughtown, Street, #A Winston-Salem, NC 27107	Lashunhuntley@gmail.com
Brian P. Burley	4761 Kennington Terrace Court Winston-Salem, NC 27103	bpburley@msn.com
Phillip Carter Sr.	1148 E 5 <sup>th</sup> Street, Apt.C Winston-Salem, NC 27101	Phillip_c9@yahoo.com
Chester David	1906 Brantley St. Winston-Salem, NC 27103	chesterodavid@gmail.com
LaMonica Sloan	301 Thompson Center Winston-Salem, NC 27110	sloanl@wssu.edu
Jose Perez, Jr.	1110 East Seventh St. Winston-Salem, NC 27101	Perezj2@forsyth.cc
Rebecca Bender	439 Horace Mann Avenue Winston-Salem, NC 27104	rjhrunner@yahoo.com
Adam Neiberg	2400 Reynolda Road Winston-Salem, NC 27106	aneiberg@hotmail.com
David Clayton	1405 Ridgemere Lane Winston-Salem, NC 27106	claytontennis@hotmail.com
Robert Paul Hinshaw	2100 Silas Creek Pkwy Winston-Salem, NC 27103	rhinshaw@forsythtech.edu
David Myers	PO Box 7227 Winston-Salem, NC 27109	myerdml@wfu.edu
Laura Leigh Oyler	401 N. Main Street Winston-Salem, NC 27101	oylerl@rjrt.com
Katie Ann Lefelar	207 Cascade Avenue Winston-Salem, NC 27101	lefelak@rjrt.com
Gloria M. Samuels	3733 Ogburn Avenue Winston-Salem, NC 27116	gloriasamuels4u@gmail.com
Tanya Bellanger	1977 Sentry Pointe Lane Winston-Salem, NC 27127	tbellanger@qeschools.org



**Board of Directors' Officers and Committees**

**Note:** All committees of the board should fairly reflect the composition of the board (10A NCAC 97C .0109). Be sure to identify the chairperson and other committee positions.

Name	Office	Sector Represented	County Represented*
<b>Officers of the Board</b>			
David Clayton	Chairperson	Special Interest	
Adam Neiberg	Vice Chair	Elected Official	
Gloria Samuels	Secretary	Elected Official	
Amatullah Saleem	Assistant Secretary	Low Income	
Rebecca Bender	Treasurer	Special Interest	
<b>Committee Name: Executive</b>			
David Clayton	Chairperson	Special Interest	
Adam Neiberg		Elected Official	
LaMonica Sloan		Elected Official	
Gloria Samuels		Elected Official	
Laura Leigh Oyler		Special Interest	
Chester David		Elected Official	
Rebecca Bender		Special Interest	
Amatullah Saleem		Low Income	
<b>Committee Name: Finance</b>			
Rebecca Bender	Chairperson	Special Interest	
Adam Neiberg		Elected Official	
LaShun Huntley		Special Interest	
Naomi Blackmon		Low Income	
Marsha Davis		Low Income	
Tonya Bellanger		Elected Official	
Eva Gray-Allen		Low Income	
<b>Committee Name: Development &amp; Fundraising</b>			
LaMonica Sloan	Chairperson	Elected Official	
David Myers		Special Interest	
Eva Gray-Allen		Low Income	
Tonya Bellanger		Elected Official	
Phillip Carter		Elected Official	
Robert Hinshaw		Special Interest	
Jose Perez		Low Income	
Alinda Gadson		Outside Representative	
<b>Committee Name: Plans &amp; Objectives</b>			
Amatullah Saleem		Low Income	
Katie Lefelar		Special Interest	
Mary Ford		Low Income	
Naomi Blackmon		Low Income	
Adam Neiberg	Chairperson	Elected Official	
David Myers		Special Interest	
LaMonica Sloan		Elected Official	
<b>Committee Name: Program</b>			
Chester David	Chairperson	Elected Official	
Minnie Ervin		Low Income	
Robert Hinshaw		Special Interest	
David Clayton		Special Interest	
Amatullah Saleem		Low Income	
Marsha Davis		Low Income	
Brian Burley		Elected Official	
Tonya Bellanger		Elected Official	

Committee Name: Human Resources		
Laura Leigh Oyler	Chairperson	Special Interest
Brian P. Burley		Elected Official
Eva Gray-Allen		Low Income
Jose Perez		Low Income
Mary Ford		Low Income
Katie Lefelar		Special Interest
LaShun Huntley		Private
Committee Name: Nominating		
Katie Lefelar		Special Interest
Phillip Carter Sr.		Elected Official
Marsha Davis		Low Income

\*To be completed by agencies serving multiple counties.

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
Planning Process Narrative**

1. Explain in detail how each of the following was involved in the planning and development of this strategic plan.

a. **Low-Income Community:**

ESR sponsors a number of community forums in low-wealth residential areas, in easily accessible facilities such as ESR, local churches, recreation centers, Department of Social Services, and VITA sites. Our low-wealth community participates in these discussions, sharing their experiences and everyday realities. Those who attend receive information about ESR's currently operated programs and ESR solicits their input regarding challenges in their neighborhoods and the potential solutions ESR might offer. ESR's Board and management consider the information from these forums when developing new strategic plans. Representatives of the poor on the ESR board have input into the planning process at both the board and committee levels. ESR encourages program participants to complete a questionnaire regarding their experiences with our agency, including suggestions for further program development based on community needs.

b. **Agency Staff:**

ESR's staff provides feedback on the strategic plan via online surveys. Additionally, staff members are encouraged to comment on suggested changes during their annual evaluations, and this information is considered as part of strategic planning. The staff meets with the planning consultant to discuss the topics being considered in the strategic planning process. Members of management do not attend this session so that facilitators can encourage open discussion of issues that should be considered. Feedback from this meeting is used in the plan development process. Management goes through a similar process of meeting with facilitators, attending focus groups, and completing surveys.

c. **Agency's Board Members:**

The Board also contributes feedback via surveys, focus groups, and meetings with facilitators. The board meets to discuss the findings, and chooses which topics that have emerged are immediate and able to be addressed in the strategic plan. From these decisions, action plans are crafted to map the implementation of the plan. The board committees work together with appropriate staff members to address aspects of the strategic plan that fall in their areas of expertise (such as the Finance Committee working with our accounting department to update our Business & Operations manual as part of our current Plan, implemented last year).

2. Describe your agency's method and criteria for identifying poverty causes and list the identified causes. Also describe the methods and criteria used to determine priority and selection of strategies to be implemented that will address the poverty causes.

Collection and study of data on factors related to poverty (such as racial discrimination, disparity in wage scales between men and women, poor education, and un- or under-employment), provide ESR with important information to identify and combat the causes of poverty in the community. Case management services help identify gaps in client education that can also help us identify poverty causes. These gaps include lack of economic literacy and lack of positive role models in a mentoring capacity.

The Board also discusses poverty causes in the process of evaluating and monitoring the work of the agency. The ESR Board often invites Self-Sufficiency Program graduates to Board meetings to discuss their success,

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
Planning Process Narrative (continued)**

to provide feedback regarding the original cause of their poverty and to discuss what worked best for them in getting out of poverty. Graduates are encouraged to share their opinions about ways to modify services to make programs even more successful in removing residents from poverty.

Available resources are a major factor in selecting causes to address. In line with ESR's mission to combat poverty in Forsyth County, we are continuing to emphasize activities designed to combat three major causes of poverty in Forsyth County: 1) lack of jobs paying a living wage, 2) lack of economic literacy resources and training, and 3) lack of availability of low to moderate-income housing opportunities. ESR addresses other poverty causes on a basis of greatest apparent need/least availability of suitable services. ESR closely monitors changing needs of the low-income population in Forsyth County and adjusts its programming accordingly. ESR is focusing on increased poverty issues in Forsyth County including layoffs, cuts in work hours, cuts in medical insurance benefits, and difficulty in the areas of job placement, wage progression, and employment promotion.

The criteria used for selecting the causes of poverty to be addressed is the monetary impact which a particular cause has on the low income population of Forsyth County and priorities mandated by the state for agencies which administer the Community Service Block Grant funds.

The criteria used to select the projects for a one-year program are:

- a) Does the project assist the Agency in meeting its mission statement as approved by the Board of Directors?
- b) Which activities will have the greatest impact on the most problems facing poor people?
- c) What nature and quantity of resources are available to address a particular need?
- d) Is the project within the capacity of the staff to perform?
- e) Will the project fill a service gap in the community?
- f) Will the project assist in meeting ROMA goals?
- g) Will the project have a significant community impact in the future?
- h) Will the project lead to cost effective empowerment of the poor?

The methods used include:

- a) Selecting and prioritizing criteria,
- b) Presenting selected strategies to the appropriate committee and Board of Directors for approval,
- c) Discussing prioritized strategies with other service providers to ensure consistency and non-duplication of services within the local continuum of care,
- d) Making sure methods are consistent with rules and regulations associated with the CSBG Grant,
- e) Making sure methods will include specific strategies designed to meet ROMA goals, including program results designed to demonstrate the positive outcome measures generated by the CSBG Program,
- f) Implementation of our strategic planning model mission and vision to ensure the most cost effective empowerment of clients through community impact strategies designed to combat the root causes of poverty in Forsyth County, and
- g) Ensuring immediacy, transparency, and accountability when using public funding to provide client services.

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
Planning Process Narrative (continued)**

3. Describe activities that your agency has undertaken to advocate for and empower low-income individuals and families to achieve economic independence and security.
- a) CSBG clients are encouraged to enroll in the IDA Program. The IDA Program promotes homeownership, which provides an opportunity for residents to have a greater stake in their community. IDA graduates serve in community groups, neighborhood protection groups, school related committees, community election committees, community awareness groups, and other opportunities made possible through homeownership.
  - b) CSBG clients who enroll in NC Saves have access to banking products and services. Previously unbanked clients gain knowledge and confidence with this experience. We encourage all participants to open savings accounts and fund them regularly, and many are able to do so once they are stabilized.
  - c) Greater collaboration between CSBG Self-Sufficiency and IDA, NC Saves, and EITC activities empowers CSBG clients, especially those who receive priority entry into other in-house ESR programs such as IDA.
  - d) We continue to emphasize education/training. Education/training will provide opportunities for better jobs, which offers ESR's CSBG-funded Self-Sufficiency clients increased authority over their lives and futures, with the potential to move them out of poverty.
  - e) The Forsyth Free Tax (EITC/VITA) Program empowers households by providing free tax preparation services, more money in clients' pockets from EITC returns and connections to other asset building programs in the community.
  - f) ESR emphasizes financial literacy education. We regularly offer classes to our Self-Sufficiency program clients with the expectation that they will complete the class before exiting the program.
  - g) ESR boosts Self-Sufficiency clients' self esteem, self confidence, and assertiveness in taking greater control of their lives through case management services, including personal and budgeting counseling, which helps clients understand that they can control their lives and finances.
  - h) ESR works collaboratively with other agencies to help clients get services they need to remove themselves from poverty.
4. Describe how your agency plans to make more effective use of, coordinate and form partnerships with other organizations and programs including: State welfare reform efforts; public and private resources; religious organizations, charitable groups, and community organizations.

ESR collaborates with a broad range of service organizations to implement activities to combat poverty. We collaborate with churches to help meet immediate and emergency needs through in-kind services. Private and foundation resources help provide client assistance funds that provide clients with a safety net while they learn self-sufficiency skills and take control of their futures. We collaborate with a variety of agencies that provide educational services including basic life skills, financial literacy, job search and retention skills, career training, post secondary education, and homebuyer education. Goodwill, the Department of Commerce, Workforce Development, Urban League, Vocational Rehabilitation, and the JobLink Career Center assist our clients with employment related needs. We also utilize our friendships with agencies of all kinds to improve our outreach, both to low-income residents of our community who might benefit from our services and to community residents who are in a position to assist through donations and volunteerism.

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
Planning Process Narrative (continued)**

ESR's participation in the Coordinated Intake Center makes collaboration with other participating agencies a natural extension of our service model.

We continue our collaboration with the WSFC school system and local foundations and agencies to reach parents of children in priority schools to improve family stability and help break the cycle of generational poverty. We work with families of elementary school aged children, providing case management and asset building services in their neighborhoods, with an additional goal of increasing parental engagement in the schools and with their children. We hope to involve the faith community in our program to provide mentoring and social/emotional support to our clients.

5. Describe how your agency will establish linkages between governmental and other social services programs to assure the effective delivery of such services to low-income individuals, to avoid the duplication of such services and to fill identified gaps in services, through the provision of information, referrals, case management and follow-up consultations.

ESR provides information to everyone who contacts our agency. For those whose needs fall outside the scope of our programs, we provide referrals to partner or collaborative agencies to see that those who need services can obtain them. We constantly seek new service providers that we can tap to assist community residents that do not qualify for our programs. We also leverage services in collaboration with other programs and agencies to help our clients obtain more robust services without taxing any single agency's resources more than necessary.

Those whose needs can best be met by ESR's programs are provided case management, financial literacy training, and supportive services to help them become stable. ESR's Success Coaches encourage each client to meet and exceed their goals, and to set new, higher ones that lead to still greater self-sufficiency. We emphasize training, financial literacy, and wage/employment progression in our self-sufficiency case management, and as such we make use of any community resources we find that align with our case management model. We expanded our employment related services through close linkages with the Workforce Investment Board, the JobLink Career Center, and The Department of Commerce/Division of Workforce Solutions. ESR has CSBG-funded staff out-stationed at the main JobLink Career Center (The Department of Commerce / Division of Workforce Solutions), Goodwill Industries, and Forsyth Technical Community College to meet these needs. As we learn of new services and programs available in the community, we contact the providers to learn more and assess how those services might benefit our clients, as well as discuss how our services might benefit theirs.

6. Provide a description of how your agency will support innovative community and neighborhood-based initiatives related to the purposes of the Community Services Block Grant (fatherhood initiatives and other initiatives with the goal of strengthening families and encouraging effective parenting).

ESR strongly supports fatherhood initiatives through providing self-sufficiency services to clients referred by the Urban League and related activities sponsored through WorkFirst and Welfare-To-Work initiatives. We work closely with the Housing Authority in making cross-referrals between ESR programs and the Family Self-Sufficiency Program. We also collaborate with Family Services and Goodwill Industries programming. All ESR programs have the goals of strengthening families and communities, improving family stability, and combating generational poverty through education, asset building opportunities, and exposure to proper role models through mentoring opportunities. Community programs refer mostly African-American males to ESR for assistance as they are about to be incarcerated or as they re-enter society. Challenging issues related to this population include child support payments, child visitation and related effective parenting

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
Planning Process Narrative (continued)**

skills, employment, housing (difficult due to criminal history and past rent payment history), and related issues threatening family stability. ESR programs work with the family unit to address stability issues, and seeks out educational resources for clients that help improve their parenting and problem solving skills.

We are collaborating with the Winston-Salem Forsyth County School System and Reynolds American to provide case management services to families of school-aged children in priority schools neighborhoods. This new outreach activity works with parents in place in their neighborhoods to connect them with resources to improve basic parenting skills, and to build necessary basic proficiencies for assisting their children with school work (such as reading and math skills). Additionally, the program will offer incentives for closer interactions between parents and the school system, and for educational activities accomplished with their children. We are working in four neighborhoods in which 90% of residents are low or very low income, and eligible for CSBG self-sufficiency services. We are also partnering with The Salvation Army, Habitat For Humanity, and Liberty East Redevelopment for this program..

7. Describe activities that your agency has undertaken or plans to undertake, on an emergency basis, for the provision of such supplies and services, nutritious foods and related services, as may be necessary to counteract conditions of starvation and malnutrition among low-income individuals.

ESR has formed close working relationships with the Northwest Harvest Food Bank, Department of Social Services, American Red Cross, The Salvation Army, Samaritan Ministries (Soup Kitchen), Rescue Mission, Health Department, Crisis Control Ministries, Goodwill Industries, local churches, local grocery stores (food vouchers/gift cards), and others to meet documented needs in this area. ESR makes community referrals to clothing closets. ESR understands that basic needs such as food, clothing, and shelter must be met before higher-level self-sufficiency goals can be accomplished. The CSBG Program and the local Rapid Re-Housing Program have strengthened ESR's relationships with Crisis Control Ministries, our major emergency assistance provider. ESR also has its own small supply of non-perishable goods to supplement clients' use of these community resources, which relies almost entirely on community donations.

8. Describe how your agency will coordinate the provision of employment and training activities with entities providing activities through statewide and local workforce investment systems under the Workforce Innovation and Opportunity Act.

ESR still coordinates employment improvement activities through the JobLink Career Center of which ESR is a collaborative partner. As a member of the Asset Building Coalition, ESR advocates for livable wages from local employers.

ESR's *Road To Empowerment* workshop series focused primarily on asset building and financial literacy, but it dedicates a significant amount of time to application and interview skills to assist participants in obtaining higher paying jobs. As part of this initiative, ESR hosts a job fair that attracts a number of moderate to high paying employers. ESR's clients have the opportunity to obtain better jobs through this contact.

The Chamber of Commerce has begun working to re-brand Winston-Salem as a "destination" city by attracting more arts-based activities such as festivals and arts venues. This increases the need for hospitality service positions, many of which pay livable wages. As a member of the Asset Building Coalition, ESR encourages the creation of jobs that fit the new systemic approach in the city and county, and that pay well.

Goodwill Industries, the local community colleges, ESC, Vocational Rehabilitation, public schools, and the Urban League were all collaborative partners under WIA and our association to serve the community

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
Planning Process Narrative (continued)**

continues. Employment services are crucial to the success of our programs. ESR has increased coordination with Goodwill Industries in areas of pre-employment skills training, job placement of clients, job retention, and economic literacy training.

Many of ESR's programs are an excellent fit for clients who are improving their skills to increase their employability in fields that offer living wages. One of our largest volume Forsyth Free Tax (EITC VITA) sites is located at a JobLink satellite site at Goodwill, which provides local residents access to our programs, as well as connections to Goodwill's employment solutions. Clients obtaining employment through the Workforce Development Program often enroll in the Self-Sufficiency Program at ESR to focus on job retention, transportation, childcare, budgeting, and related factors so that the new job can assist the household rising above poverty and maintaining employment and financial stability.

9. Describe how your agency will ensure coordination with the emergency energy crisis intervention program under title XXVI (relating to low-income home energy assistance).

The ESR Self-Sufficiency Program staff coordinates with the Department of Social Services in administering the Emergency Energy Crisis Intervention Program under Title XXVI by:

- Attending information sharing meetings
- Participating in outreach planning
- Referring eligible households to the Department of Social Services and The Salvation Army to apply for assistance
- Acting as personal representative for individuals who have no one else to apply for them
- Distributing information flyers to areas with a concentration of low-income residents
- Coordinating activities with The Salvation Army, where CIP applications are accepted
- Assisting in publicizing beginning and ending dates for LIHEAP/CIP assistance
- Accepting referrals of applicants who did not qualify for fuel assistance and helping them locate other appropriate resources
- Tracking Emergency Assistance clients on the MCAH and AR4CA systems so that all community services providers will be aware of the EA services already provided to each client.

10. Describe the needs of low-income youth and your agency's efforts to promote increased community coordination and collaboration in meeting the needs of low-income youth.

ESR and Goodwill Industries entered into a collaborative effort to provide economic literacy training to low income families, specifically including low-income youth. The local school systems do not provide financial education training and children need this information to escape or avoid poverty in the future. All of ESR's programs combat generational poverty issues. We are receiving more requests for services to youth who are about to become adults.

ESR is collaborating with a local initiative to provide economic literacy training to young adults as part of the Crosby Scholars education program. This young adult population consists of high school students preparing to enter a college or university, and provides a savings match to meet tuition and fees when the program is completed. This initiative will serve 10 individuals per quarter.

We are continuing to collaborate with the Winston-Salem/Forsyth County school system to provide self-sufficiency services to families in priority schools neighborhoods. The program will include parenting skills training and case plans will emphasize the importance of improving financial literacy early in a child's life to help them escape poverty. Parents will be able to provide a strong financial literacy education for their



**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
Planning Process Narrative (continued)**

children. Reynolds American is a partner in this program, as are other community agencies. ESR will work with existing priority schools programs in our area to avoid duplication of services.

11. Describe your agency's method for informing custodial parents in single-parent families that participate in CSBG programming about the availability of child support services. In addition, describe your method for referring eligible parents to the child support office[s].

ESR's client Success Plans include a household budget analysis that seeks out sources of income that the client may qualify for but is not taking advantage of, including but not limited to child support. We refer client custodial parents who are eligible for child support directly to the Department of Social Services for child support services. ESR has direct linkage to DSS through a number of collaborative projects, and we are able to refer eligible clients directly to the appropriate department, and sometimes even to a specific person in that department. We make these referrals on a case-by-case basis.

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
OEO Form 210**

**Agency Strategy for Eliminating Poverty**

**Planning Period: July 1, 2016 - June 30, 2019**

**Section I: Identification of the Problem (use additional sheets if necessary)**

1. Give the Poverty Cause name(s), rank the poverty cause(s) and identify which one(s) the agency will address.
  - 1) Lack of comprehensive services for the purpose of enabling low-income families to become self-sufficient
  - 2) lack of jobs paying a living wage,
  - 3) lack of economic literacy resources and training, and
  - 4) lack of availability of low to moderate income housing opportunities.

ESR addresses all of these causes in some form through our programs, however we have chosen to address the lack of comprehensive services that enable low income families to become self-sufficient.

2. Describe the poverty cause(s) in detail in the community with appropriate statistical data (include data sources).

According to the US Census Bureau, approximately 18.6 % of Forsyth County residents are living in poverty. The Corporation for Enterprise Development found that 30.5% of Winston-Salem households owes more than they own, and over one third of families do not have enough assets to meet their most basic needs for three months should they lose their main source of income.<sup>1</sup>

According to the *Assets & Opportunity Profile: Winston-Salem and Forsyth County*, 39% of Winston-Salem households live in asset poverty, 22% live in extreme asset poverty, 60% of single-parent homes live in asset poverty, and 56% have subprime credit scores.<sup>1</sup>

- (A) Explain why the problem exists.

A variety of factors threaten the economic security of our families and children in recent years including increased poverty, high unemployment levels, industrial decline or corporate reluctance to relocate to North Carolina, slow job growth, and reduction in federal and state social services spending. Private fund sources have become more reticent with regards to grants, being able to provide less support to fewer non-profits than ever before, at a time when the need is still very great.

Various agencies provide Success Coaching services for select populations in Forsyth County. However, these services are limited in scope and intensity, they focus on individuals rather than families, and they are not comprehensive in nature. We are not aware of any other agency that provides comprehensive, customized, and integrated Success Coaching services and other supportive services offered by the Self-Sufficiency Program.

<sup>1</sup> Building Economic Security in America's Cities: New Municipal Strategies for Asset Building and Financial Empowerment (Washington, DC: CFED, 2011).

**Community Services Block Grant Program  
Fiscal Year 2017-18 Application for Funding  
OEO Form 210**

**Agency Strategy for Eliminating Poverty**

(B) Identify the segment of the population and give the number of people experiencing the problem.

According to the US Census Bureau, approximately 18.6 % of Forsyth County residents are living in poverty. Single parent, female-headed households are at greatest risk of being persistently poor, with 60% of these single-parent households defined as asset poor. New families are still joining the ranks of the low-income from the middle class as jobs that pay enough to support families are slow to become available. These newly impoverished families are steadily increasing the volume of residents seeking out supportive services. The US Department of Labor Bureau of Labor Statistics reports that unemployment as of August, 2016 has declined to 4.6%, however the jobs that are becoming available are still mostly low wage and entry level jobs that are inadequate for supporting a family. Jobs paying a living wage are still difficult for our clients to obtain, both because the jobs are scarce and because many low-income persons are also not sufficiently educated to meet the requirements for moderate to high paying jobs.

(C) Provide demographic information of those adversely effected inclusive of Gender, Age, Race/Ethnicity

Based on information from City-Data.com, the percentage of Forsyth County residents living in poverty was 19.6% in 2016. In Winston-Salem, where the majority of our participants reside, that statistic rises to 28.4% live below the poverty level, and 8.6% are in extreme poverty—less than 50% of the poverty guidelines income.

It is important to note also that 35% of the poor in Forsyth County are not high school graduates, and only 4.5% of those below poverty level have attained a Bachelor's degree or higher. About 40% of those in poverty are unemployed, and of those who worked, 42.5% were employed only part time.

Females are more likely to be poor, with 20.9% of the female population with incomes below poverty. Only slightly fewer males (18.3 %) were poor.

A frightening 30.7% of children (under age 18) in Winston-Salem are living below the poverty level. In the 18-34 age group, 25.7% are poor.

Of those below poverty level, the majority were among minorities: 30.3% were African American, and 44.6% were Hispanic.

Read more:

[http://www.city-data.com/county/Forsyth\\_County-NC.html#ixzz3tkLdebik](http://www.city-data.com/county/Forsyth_County-NC.html#ixzz3tkLdebik)

<http://www.city-data.com/poverty/poverty-Winston-Salem-North-Carolina.html>

<https://factfinder.census.gov/faces/tableservices/jsf/pages/productview.xhtml?src=CF>

(D) Explain how the persons are adversely affected.

The adverse effects of the economic recession caused the number of families and individuals in poverty in Forsyth County to increase. Also, the nation's savings rate for low to moderate income families is similar to the rate documented in 1933, which is the lowest in history.

Supportive services for the poor, including Success Coaching, are the most critical ingredients in empowering families to move toward self-reliance. Supportive services (such as direct financial assistance) offered without intensive case management are often unsuccessful. Recidivism becomes a problem when comprehensive as well. As poor families struggle to find ways to survive, they find themselves back in the same cycle of having

**Community Services Block Grant Program  
Fiscal Year 2017-18 Application for Funding  
OEO Form 210  
Agency Strategy for Eliminating Poverty**

only some of their needs addressed, or addressed only short- term. In the majority of cases, impoverished families need a broad range of services in order to become self-reliant, and either cannot access or do not know about resources in the community that can assist them. They take care of the immediate crisis through available services, but may still be only one illness or accident away from homelessness and a return to dependence on agencies and churches for survival. As long as these families have difficulty taking advantage of comprehensive services that include individualized case management as well as supportive services, their children will also be more likely to remain impoverished, continuing the cycle of generational poverty. Not only does this type of financial insecurity destabilize families, it also jeopardizes the long-term vitality of cities and local economies.

**Section II: Resource Analysis (use additional sheets if necessary)**

**(E) Resources Available:**

**a. Agency Resources:**

Burton Street Shelter, 5th Street Shelter, Interns/volunteers

**b. Community Resources:**

**Training, In Kind Services**

American Red Cross  
Career Connections and Prosperity Center  
Department of Commerce  
Department of Employment Security  
Forsyth County DSS  
Forsyth County Health Department  
Forsyth County Mental Health Department  
Forsyth Technical Community College  
Goodwill Industries  
JobLink Career Center  
Lou Baldwin Realty  
NC Cooperative Extension  
Next Step Ministries  
Second Harvest Food Bank of Northwest NC  
Salem College  
Veteran's Administration  
Wake Forest University  
JobLink Career Center  
Winston-Salem Housing Authority  
Winston-Salem State University  
W-S/Forsyth County Homeless Council  
Workforce Development Board

**Referral**

Local Faith Community  
Rescue Mission  
Salvation Army  
Samaritan Ministries  
Crisis Control Ministries  
Sunnyside Ministry  
Legal Aid of North Carolina

**Fund Sources**

MDC/EITC Carolinas  
Forsyth County  
NC Department of Health & Human Services(OEO)  
United Way of Forsyth County  
Winston-Salem Foundation  
W-S Community & Business Development Dept.  
City of Winston-Salem  
Department of Housing & Urban Development (HUD)  
FEMA  
RJ Reynolds

**IDA Partner/Resource**

Center for Home Ownership (CHO)  
Forsyth County Housing Department  
Local Banks  
Local Realtors  
Habitat for Humanity  
IDA Work Group  
NC Housing Finance Agency  
NC IDA Collaborative

**EITC/NC Saves Partner/Resource/Site**

Forsyth Working Families Partnership  
Local Libraries  
Local Banks  
IRS  
Offices Community Services  
Goodwill Industries  
Mi Casa

**Community Services Block Grant Program  
Fiscal Year 2017-18 Application for Funding  
OEO Form 210 Agency  
Strategy for Eliminating Poverty**

(F) Resources Needed:

- c. Agency Resources:  
Staff, volunteers, and financial resources
- d. Community Resources:  
Volunteers, financial resources

**Section III: Objective and Strategy**

(G) Objective Statement:

To move 180 families above Poverty Income Guidelines by June 30, 2019

(H) Strategies for Objective:

Provide Success Coaching to low-income families along with a direct provision of services resulting in an increase in family income and empowerment leading to economic self-reliance including families moving above the poverty level.

Provide long-term Success Coaching to families along with a direct provision of services that results in job placement, job retention, job stability, wage progression, family income increase, improvement in educational levels, economic literacy training, asset building, stable, affordable housing, healthcare coverage and basic independent living skills.

Collaborate with local human service agencies to provide needed assistance, to maximize resources, to minimize gaps in services, and to prevent duplication of services.

Promote a better community understanding regarding the need to remove barriers affecting the unemployed and underemployed in their efforts to attain skills to enable them to compete in the job market.

Provide educational training in career areas leading to employment paying a living wage and providing healthcare coverage.

Provide self-sufficiency and housing services to low-income families who are not homeless but present significant housing needs.

Provide economic literacy training and associated programs with the goals of changing savings/spending habits, creating a realistic family budget. Additionally, persuade families to take advantage of Earned Income Tax Credits (EITC), free tax preparation services and to make wise use of their tax refund money, promote savings and asset building as a way to increase net worth, promote asset accumulation (homeownership) as a tool for combating generational poverty (IDA program), introduce clients to NC Saves, which assists households in opening a savings account, assists in accumulation of savings, teaches financial literacy, and helps establish good credit and reduce debt.

Use other ESR in-house programs such as IDA, NC Saves, and Forsyth Free Tax (EITC/VITA) to supplement and support our core services provided in the Self-Sufficiency Program.

Meet clients in their neighborhoods to help stabilize households, improve parenting skills, and increase parent involvement in schools.

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
One-Year Work Program  
OEO Form 212**

Section I: Project Identification							
1. Project Name:	Self-Sufficiency Program						
2. Poverty Cause Name:	Lack of comprehensive services for the purpose of enabling low-income families to become self-sufficient.						
3. Objective Statement:	To move 180 families above Poverty Income Guidelines by June 30, 2019.						
4. Selected Strategy:	To provide families with long-term Success Coaching and direct provision of services, resulting in the cost effective empowerment of clients leading to economic self-reliance.						
5. Project Period:	July 1, 2018	To	June 30, 2019	Plan Year	3	of	3
6. CSBG Funds Requested for this Project:	\$616,552						
7. Total Number Expected to Be Served:	240						
a. Expected Number of New Clients	120						
b. Expected Number of Carryover Clients	120						
Section II: One-Year CSBG Program Objective and Activities							
Activities		Position Title(s)		Implementation Schedule			
				First Quarter	Second Quarter	Third Quarter	Fourth Quarter
<b>Objective:</b> To provide 240 families with long-term Success coaching and direct provision of services, resulting in the cost effective empowerment of clients leading to economic self-reliance during the period of July 1, 2018 through June 30, 2019.				150 (30 new)	180 (30 new)	210 (30 new)	240 (30 new)
1. Obtain clients from walk-ins, direct referrals, and recruitment that result in clients coming to ESR to access services. Identify, and recruit potential participants in low-income communities to ensure that services are available to eligible residents who might not access services at ESR. The Forsyth Free Tax sites provide ESR an opportunity to serve CSBG eligible clients that have never been in contact with self-sufficiency services before. Staff are ambassadors in the community and take advantage of observed outreach opportunities.		<i>Director of Agency Operations (Agency Ops)</i> <i>Self-Sufficiency &amp; Family Advocate Service Manager (SSFA Manager)</i> <i>Outreach Service Coordinator (Outreach Coordinator)</i> <i>Success Coach</i> <i>Executive &amp; Program Assistant (Exec Asst)</i> <i>Administrative Assistant &amp; Data Analyst (Admin/Data)</i> <i>Orientation/Eligibility Specialist (Orientation)</i> <i>Receptionist/Resource &amp; Referral Agent (Reception)</i> <i>Information &amp; Technology Associate (IT)</i> <i>Fiscal &amp; Compliance Associate (Compliance)</i>		30 (30 new)	60 (30 new)	90 (30 new)	120 (30 new)

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
One-Year Work Program  
OEO Form 212 (continued)**

<b>Section II: One-Year CSBG Program Objective and Activities (continued)</b>					
Activities	Position Title(s)	Implementation Schedule			
		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
2. Obtain detailed case record information in order to determine eligibility and needs. ESR verifies eligibility on all cases. Staff makes every effort to maintain file integrity and client privacy.	Agency Ops SSFA Manager Outreach Coordinator Success Coach Exec Asst Admin/Data Compliance Orientation Reception	30 (30 new)	60 (30 new)	90 (30 new)	120 (30 new)
3. As part of orientation/intake activities, examine and evaluate individual client situation to determine services needed to promote self-sufficiency.	Agency Ops SSFA Manager Outreach Coordinator Success Coach Exec Asst Admin/Data Compliance Orientation Reception	30 (30 new)	60 (30 new)	90 (30 new)	120 (30 new)
4. As part of intake activities, develop a Success Plan, including short-term objectives and long-term goals with each new client to provide comprehensive services for enabling self-sufficiency.	Agency Ops SSFA Manager Outreach Coordinator Success Coach	30 (30 new)	60 (30 new)	90 (30 new)	120 (30 new)
5. Formulate or update Success plans as necessary with each client. Periodically review cases for quality control (minimum of every two weeks, maximum every 90 days)	Agency Ops SSFA Manager Outreach Coordinator Success Coach Exec Asst Admin/Data Orientation	150 (30 new)	180 (30 new)	210 (30 new)	240 (30 new)
6. Refer individuals to as many appropriate resources as necessary. This increases accessibility to services in a community that is rich in resources and saves ESR's resources by having the human service agency receiving the referral to activate its resources to serve the client.	Agency Ops SSFA Manager Outreach Coordinator Success Coach Exec Asst Admin/Data Orientation Reception	125 (125 new)	250 (125 new)	375 (125 new)	500 (125 new)

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
One-Year Work Program  
OEO Form 212 (continued)**

<b>Section II: One-Year CSBG Program Objective and Activities (continued)</b>					
Activities	Position Title(s)	Implementation Schedule			
		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
7. Provide individual counseling in such areas as: life skills, employment, housing, economic literacy, asset building, savings, budgeting, job search, etc.	Agency Ops SSFA Manager Outreach Coordinator Success Coach	150 (30 new)	180 (30 new)	210 (30 new)	240 (30 new)
8. Provide financial assistance for clients needing supportive services (food, shelter, household expenses, childcare, and transportation), work and education-related expenses, or other barriers to self-sufficiency. Communication with Community Emergency Assistance Providers is through HMIS.	Agency Ops SSFA Manager Outreach Coordinator Success Coach	150 (30 new)	180 (30 new)	210 (30 new)	240 (30 new)
9. Provide opportunity for Self-Sufficiency activities with all ESR services (IDA, Housing, Permanent Housing, NC Saves, Forsyth Free Tax (EITC/VITA) programs) through intra-agency referrals, interagency referrals, joint case staffing, and training of adjunct staff by the Director of Agency Operations.	Agency Ops SSFA Manager Outreach Coordinator Success Coach	150 (30 new)	180 (30 new)	210 (30 new)	240 (30 new)
10. Formulate, coordinate and conduct workshops designed to provide and/or enhance knowledge and skills needed to cope with or escape from a poverty lifestyle, i.e. consumer information, economic literacy, asset building, safety and crime prevention, parenting, etc.(Road To Empowerment)	Agency Ops SSFA Manager Outreach Coordinator HR Manager	1 (1 new)	2 (1 new)	3 (1 new)	4 (1 new)
11. Accumulate detailed information through the maintenance of a case file system and a computerized client assistance recording software package, Accountable Results for Community Action (AR4CA). AR4CA stores and retrieves information efficiently and effectively.	Agency Ops SSFA Manager Outreach Coordinator Success Coach Orientation Admin/Data Compliance	150 (30 new)	180 (30 new)	210 (30 new)	240 (30 new)
12. Provide outreach staff to JobLink, Forsyth Tech, and Goodwill to enhance collaborations and aid clients seeking job development, job search, job placement, wage progression, healthcare coverage, future training, job retention, educational upgrade, transportation, childcare, and related topics.	Agency Ops SSFA Manager Outreach Coordinator Success Coach	192 hours (192 new)	384 hours (192 new)	576 hours (192 new)	768 hours (192 new)



**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
One-Year Work Program  
OEO Form 212 (continued)**

<b>Section II: One-Year CSBG Program Objective and Activities</b> (continued)					
Activities	Position Title(s)	Implementation Schedule			
		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
13. Coordinate with other community agencies and groups in order to initiate institutional changes that benefit low-income residents of Forsyth County through information sharing, community problem solving, planning, advocacy, etc. This is a quarterly meeting on a varying schedule.	Agency Ops	1 (1 meeting per quarter)	2 (1 meeting per quarter)	3 (1 meeting per quarter)	4 (1 meeting per quarter)
14. Conduct annual evaluations of services and staff. This evaluation will include data from monthly, quarterly and semi-annual reviews.	Executive Director Agency Ops SSFA Manager				April/May 2018
15. Plan and coordinate our annual Back to School Drive to prepare youth/children to enter or return to school in the fall. This event is supported by local businesses with in-kind donations that are distributed through ESR to low income youth, including those in our CSBG Self-Sufficiency Program.	Agency Ops SSFA Manager Outreach Coordinator Success Coach Orientation Reception	Jul Aug Sep	Oct		June
16. Provide clients access to lab computers and printer for numerous self-sufficiency activities, including job applications, school registrations, job search, resume creation, accessing credit and police reports, and filing tax returns, among others.	IT SSFA Manager Outreach Coordinator Success Coach Admin/Data Reception	150 (30 new)	180 (30 new)	210 (30 new)	240 (30 new)
17. Ensure that ESR meets Results Oriented Management and Accountability (ROMA) goals, including the capture, analysis and publication of performance outcome results and management accountability.	Agency Ops SSFA Manager Outreach Coordinator Success Coach IT Exec Asst Admin/Data Compliance	4 reports (Jul, Aug, Sep, and 1st Quarter)	4 reports (Oct, Nov, Dec, and 2nd Quarter)	4 reports (Jan, Feb, Mar, and 3rd Quarter)	4 reports (Apr, May, Jun, and 4th Quarter)
18. At the request of our W-S City Council Members, ESR emphasizes direct provision of Success Coaching services to veterans. The focus of these services is to remove barriers to self-sufficiency and to empower Veterans to become economically and socially self-sufficient.	Agency Ops SSFA Manager Outreach Coordinator Success Coach Admin/Data Orientation Reception	4 (2 new)	6 (2 new)	8 (2 new)	10 (2 new)

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
One-Year Work Program  
OEO Form 212 (continued)**

<b>Section II: One-Year CSBG Program Objective and Activities (continued)</b>					
Activities	Position Title(s)	Implementation Schedule			
		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
19. Continue expanding the NC Saves Project. This project provides clients the opportunity for opening interest bearing savings accounts at local banks and exposes clients to banking products. This allows ESR Success Coaches to assist CSBG clients in changing their spending/savings habits. Our CSBG Success Coaches provide financial literacy education and one-on-one financial counseling.	Agency Ops SSFA Manager Outreach Coordinator Success Coach	30 (30 new)	60 (30 new)	90 (30 new)	120 (30 new)
20. Collaborate Self-Sufficiency services with the Forsyth Free Tax Program. All CSBG clients are strongly encouraged use Forsyth Free Tax sites for free tax preparation. Historically, approximately 50% do so. Additionally, counselors offer asset building and financial literacy information as well as tax services.	Agency Ops SSFA Manager Outreach Coordinator Success Coach IT Exec Asst Admin/Data	5 (5 new)	10 (5 new)	115 (100 new)	145 (30 new)
21. ESR's focus on financial literacy and asset building has become a growing program trend for our clients. We want to continue bringing resources to bear to offer more of our clients access to this type of training. We have leveraged local funding sources to provide Financial Literacy and Asset Building classes such as Money Management and Budgeting Your Money Effectively in partnership with local banks and collaborative agencies.	Executive Director Agency Ops SSFA Manager Schools Coordinator Outreach Coordinator Success Coach Admin/Data Orientation Reception	6 classes (6 new)	12 classes (6 new)	18 classes (6 new)	24 classes (6 new)
22. ESR's focus on financial literacy and asset building has become a growing program trend for our clients. We want to continue bringing resources to bear to offer more of our clients access to this type of training. We have leveraged local funding sources to provide Financial Literacy and Asset Building classes such as Money Management and Budgeting Your Money Effectively in partnership with local banks and collaborative agencies.	Executive Director Agency Ops SSFA Manager Schools Coordinator Outreach Coordinator Success Coach Admin/Data Orientation Reception	6 classes (6 new)	12 classes (6 new)	18 classes (6 new)	24 classes (6 new)
23. New clients attend ESR financial literacy classes to learn about budgeting, behavior/money, savings/investments, and credit/debt.	Agency Ops SSFA Manager Outreach Coordinator Success Coach	15 (15 New)	30 (15 New)	45 (15 New)	60 (15 New)

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
One-Year Work Program  
OEO Form 212 (continued)**

<b>Section II: One-Year CSBG Program Objective and Activities (continued)</b>					
Activities	Position Title(s)	Implementation Schedule			
		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
24. ESR is targeting specific educational opportunities that offer immediate employment opportunities. These are Truck Driver training and Certified Medical Assistant Training. These fields are in high demand in our area.	Executive Director Agency Ops SSFA Manager Outreach Coordinator Success Coach Admin/Data Orientation Reception	10 clients (10 new)	20 clients (10 new)	30 clients (10 new)	40 clients (10 new)
25. We are a part of a community wide plan to examine Asset Poverty. As part of this collaborative initiative with the city of Winston-Salem and Forsyth County, we will expand the EITC Program and potentially the IDA Program. This plan emphasizes economic literacy training to families to help break the cycle of generational poverty and give citizens more of a stake in their community.	Executive Director Agency Ops Sr. Finance Director SSFA Manager	6 hours (One 2 hour meeting each month)	12 hours (One 2 hour meeting each month)	18 hours (One 2 hour meeting each month)	24 hours (One 2 hour meeting each month)
26. Provide self-sufficiency services and parent engagement activities to parents of priority schools children. Activities include case management, mentoring, incentives for activities with the school and for activities with the child, job search/improvement assistance, connection to parenting skills training, training to increase math and reading proficiencies to improve the parent's ability to assist children with school work, connection to legal resources such as expungement clinics, opportunity for free tax preparation, and financial literacy training.	Executive Director Agency Ops SSFA Manager Success Coach Admin/Data Orientation Reception	15 (15 New)	30 (15 New)	45 (15 New)	60 (15 New)
27. ESR will offer access to WorkKeys test preparation and certification to all CSBG Self-Sufficiency clients. Based on experience relating to client education, of the 20 clients targeted to participate in this activity, at least 5 will be seeking to secure a GED. KeyTrain will increase the client's knowledge that can lead to taking the test for the Career Readiness Certificate, and can be highly beneficial to those seeking a GED, also. Many employers require the Career Readiness Certificate, and the cost of obtaining the certification can be a barrier to educational and career success for some clients.	Executive Director Agency Ops SSFA Manager Outreach Coordinator Success Coach Admin/Data Orientation Reception	5 clients (5 new)	10 clients (5 new)	15 clients (5 new)	20 clients (5 new)

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
One-Year Work Program  
OEO Form 212 (continued)**

8. Use the tables below to enter your agency's targeted outcome results. The performance measures will be included in the agency's CSBG contract.

All CSBG grantees operating self-sufficiency projects are required to enter program targets in Table 1. Please refer to *Performance Measures and Outcomes Definitions* on page 6 of the Fiscal Year 2018-19 CSBG Application Instructions. If your agency operates more than one project, you will also need to complete Table 2 on the following page and also enter specific program targets. There should be one table of outcome measures per project.

<b>Table 1 Outcome Measures for Project 1 (enter project name)</b>	
<b>Measure</b>	<b>Expected to Achieve the Outcome in Reporting Period (Target)</b>
The number of participant families served.	<b>240</b>
The number of low-income participant families rising above the poverty level.	<b>60</b>
The number of participant families obtaining employment.	<b>10</b>
The number of participant families who are employed and obtain better employment.	<b>36</b>
The number of jobs with medical benefits obtained.	<b>12</b>
The number of participant families completing education/training programs.	<b>19</b>
The number of participant families securing standard housing.	<b>8</b>
The number of participant families provided emergency assistance.	<b>29</b>
The number of participant families provided employment supports.	<b>36</b>
The number of participant families provided educational supports.	<b>24</b>
The average change in the annual income per participant family experiencing a change.	This measure does not require a target, but must be reported.
The average wage rate of employed participant families.	This measure does not require a target, but must be reported.

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
One-Year Work Program  
OEO Form 212 (continued)**

<b>Table 2 Outcome Measures for Project 2 (enter project name)</b>	
<b>Measure</b>	<b>Expected to Achieve the Outcome in Reporting Period (Target)</b>
The number of participant families served.	

**Community Services Block Grant Program  
 Fiscal Year 2018-19 Application for Funding  
 One-Year Work Program  
 OEO Form 212 (continued)**

9. For Community Action Agencies that serve multiple counties, provide a breakdown of the expected *number of persons served* in each designated county in the table below. Show the total *number of persons served* in the table.

Number of Families to be Served Per County											
<b>Agency Name:</b>											
<b>Project Name:</b>											
<b>County</b>											<b>Total</b>
<b>Total Planned</b>											
<b>Project Name:</b>											
<b>County</b>											<b>Total</b>
<b>Total Planned</b>											

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
Monitoring, Assessment and Evaluation Plan**

1. Describe the role and responsibilities of the following in the assessment and evaluation of agency programs.
  - a. Board of Directors:

With the assistance of ESR's staff, the Program Committee develops the evaluation process, the evaluation plan, and the Evaluation Process Narrative (EPN) and presents them to the Board of Directors for approval. The Program Committee coordinates and implements the Board's evaluation of all programmatic operations. Board ad hoc committees, with each committee consisting of at least one representative from each sector of the Board, conduct further evaluation. Each committee prepares a comprehensive evaluation report to submit to the full Board for its review and approval. The Program Committee reviews evaluation strategies for impact and effectiveness. From time to time, at its discretion the Board may hire or use outside consultants and experts to assist with different phases of the evaluation. Likewise, the Board may utilize other evaluation mechanisms from time to time if appropriate.
  - b. Low-Income Community:

In addition to Board representation, the Poor sector reviews our program at public meetings, public hearings, and focus groups, and we have an open door policy at ESR for public review and comments. We also have representatives of the low-income homeless population on our Board and in attendance at Homeless Council meetings, Shelter Providers meetings, and at Housing Advisory committee meetings. We receive input from the poor through the WorkFirst Planning Committee, which includes at least two Poor sector members, the Workforce Development Program, the Faith community, and the community at large. As ESR restructured our election process for selecting representatives of the Poor on our Board, feedback from the low-income community received emphasis. Organization of the election process served to set up elections and to solicit input from the low-income community members about ESR as a whole.
  - c. Program Participants:

Program participants have input through daily contact, by making suggestions on the agency client survey form after every visit, and on another more comprehensive client survey form after completion and termination/graduation from our program. ESR also provides suggestion boxes for clients at our managed housing facilities with client comments reported to the Board by the Director of Agency Operations. Also, ESR receives program participant feedback through our client grievance procedure including comments on our participant rights form, through our major strategic planning process, and through focus groups related to specific projects. These processes include feedback from past, current and potential ESR clients. Program graduates sometimes speak at Board meetings to share their experiences while enrolled in ESR Programs. Clients can review our agency on Facebook and at GreatNonProfits.org, as well.

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
Monitoring, Assessment and Evaluation Plan**

d. Others:

At various times during the year, ESR staff members meet with low-income and target area representative groups, such as the various tenant councils of the local public Housing Authority, to discuss program activities and any problems of concern to these communities. Past Board members also continue to be active in the community to relate community impact.

ESR welcomes interns to work with our program staff in conjunction with Winston-Salem State University, Wake Forest University, Salem College and Forsyth Technical Community College. These students are able to bring fresh perspectives to the community action process and give us valuable feedback on their experiences with other agencies and programs. We learn from them how our activities parallel or diverge from expectations the students gained from their classroom studies.

Winston-Salem City Council, Forsyth County Commissioners, Johnson-West Associates, Inc., Mr. Chuck Chambers, Mr. Karl Yena, and all of our local funding sources have been involved in assessment and evaluation activities in Winston-Salem. Also, our community collaborative partners provide feedback during the CSBG planning regarding the CSBG plan and any changes that might need to occur.

The agency's annual Audit also plays a major role in the assessment and evaluation of all projects. Both Audit and Monitoring visits occur frequently with ESR fund source representatives coming to ESR for on-site visits, financial auditing of our budget and program monitoring related to program performance. We understand that characteristics such as immediacy, transparency, and accountability are crucial to the operation of CSBG funded programs.

2. Describe the systematic approach for collecting, analyzing and reporting customer satisfaction data to the Board of Directors.

ESR uses an exit interview (where possible) and an exit questionnaire to collect client satisfaction data. This data is collated annually and used to fine tune programs and is reported to the board. In addition to exit interview and questionnaire data, information from client grievances and other suggestion/review media filed during the year is included in the analysis and report.

3. Describe how administrative policies and procedures are monitored by the Board of Directors.

The Board of Directors reviews the agency's administrative policies and procedures periodically to ensure that these are up to date and appropriate to the operation of programs and activities within the agency's scope. The Board seeks input from appropriate outside sources as well (e.g. wage comparability studies when discussing salary changes) to determine what if any changes or updates are necessary. These updates are most often part of the agency's strategic planning process. Additionally, because many of these policies are included with a wide variety of applications for funding, the Board revisits these policies at least annually to be sure they meet funding source requirements.



**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
Monitoring, Assessment and Evaluation Plan**

4. Describe how the Board acts on monitoring, assessment and evaluation reports.  
The Program Committee monitors program activities and progress and gives periodic reports on all program activities (not just problem areas), and makes recommendations for corrective action as appropriate. The results of evaluations and impact studies are used in future planning efforts. When the evaluation indicates a need for immediate corrective action, the full Board takes appropriate action after adequate review by the affected committees. The corrective action taken by the Board may result in amended policies and procedures or amended plans and projects as appropriate.

The Program Committee may request outside assistance from various community organizations and agencies when evaluations and impact studies reveal problems or obstacles. The committee receives staff assistance in developing possible solutions or modifications. The committee submits recommendations to the full Board for approval. After Board approval, the committee amends plans and projects as appropriate or moves to implement said plans, projects, or updates on approval. The Board monitors new programs and program changes especially closely, resulting in intensified activity and discussion at such times.

ESR's Board and staff use the cumulative record of assessments and evaluations as an instrument for the needs assessment, goal development, and strategy selection phases in the development of the current three-year CSBG plan.

5. Describe the Board's procedure for conducting the agency self-evaluation.  
The Board appoints an ad hoc committee to manage the evaluation process. The committee establishes a bidding process to select a consultant to conduct the evaluation. The selected consultant works with the committee to plan, implement, and follow up with the evaluation. The committee ensures that all action steps are implemented and recommendations fulfilled. The consultant schedules a follow up evaluation to monitor agency progress in meeting evaluation goals.

ESR's Board conducts a self-evaluation every three to five years in conjunction with the new strategic plan cycle. Self-evaluations occur annually on a smaller scale. The Board evaluates annual program results at its annual meeting every September. Also, the United Way requires an annual self-evaluation as part of our requirements as a United Way sponsored agency.

6. Summarize the results of the Board's most recent self-evaluation. Describe how the information has been or will be used to develop the agency's next Strategy for Eliminating Poverty. Indicate the timeframe and planned activities for the next evaluation.

The results of the most recent strategic planning process included a self-evaluation. ESR reviewed its Asset Building Programs (IDA and EITC) to align them with the community-wide study that focused on the impact of asset poverty in Forsyth County. The study determined that middle class families in Forsyth County have less than 90 days worth of savings to aid in maintaining their families during a crisis.

It was determined that one of the ways for Forsyth County residents to pay down debt and create savings opportunities is to expand the EITC program. Last year the Forsyth Free Tax (EITC/VITA) program served more than 4,000 people. This program seeks to educate taxpayers

## Community Services Block Grant Program Fiscal Year 2018-19 Application for Funding Monitoring, Assessment and Evaluation Plan

about the Earned Income Tax Credit and assist them in receiving the credit for their households. The EITC Program is one of the largest anti-poverty programs in the US. On average, a qualified Forsyth County taxpayer receives \$1,700 in EITC refund dollars. In addition to benefiting working families, the credit brings money directly into our community. Studies show that taxpayers spend their refunds to buy consumer goods, pay off bills and work towards asset-building, and that financial education is critical to helping families save to weather financial difficulties in the future.

The most recent Agency evaluation process began in March 2016. Implementation of the action steps from the strategic plan proceeds according to the expected schedule. While most aspects of the strategic plan have an associated time deadline, some are ongoing processes.

Funding from the Reynolds American Foundation funded our strategic planning process. The Board chose Holly Marion and Karl Yena, outside consultants, to conduct the strategic planning process. The result of the process is a five-year strategic plan, covering the period from 2016 through 2020.

Major tasks/changes regarding this plan include the following.

- Revise vision and mission statements
- ESR will align with community goals - Ongoing
- Revise "Core Values" - Completed
- Update Succession Plan - Completed
- ESR will add 3 positions to plan for future staff transitioning due to potential retirement to be outlined in our Succession plan. Proposed functional areas to add staff will be Human Resources, Finance, and Development. -Ongoing
- Develop Talent/Retention Plan to maintain leadership team and provide necessary leadership skills for the future - Ongoing
- ESR will continue to be the community leader in providing Self-Sufficiency, Housing Services, IDA, EITC, and NC Saves services - Ongoing
- ESR will continue to promote self-sufficiency through asset building, wealth accumulation, economic literacy training, savings and investment, and related strategies to combat poverty and to minimize generational poverty factors - Ongoing
- Wrap up capital campaign to raise \$3 million to move our office location. Through the fundraising process, ESR is educating the entire community regarding ESR's services, our rich history, and our future funding needs. Move completed, Campaign near completion.
- The secondary goal of ESR's capital campaign is to expand our donor base to provide additional fundraising opportunities for the future. Expanding the donor base is ongoing.
- Increase Social Media presence including modernized website and branding.
- Continue participation in Asset Building Coalition, with participants including banks, City, County, and other agencies
- Increase emphasis on Board Training
- Increase fundraising reach
- Increase staff recognition

**Community Services Block Grant Program  
Fiscal Year 2018-19 Application for Funding  
CSBG Administrative Support Worksheet  
OEO Form 212A**

1. Administrative Support requested for (Name of Grant):		
2. Total amount of Administrative Support requested: \$		
3. Brief description of grant including the name of the funding source:		
4. Total Grant Amount:		\$
5. Give the reason for requesting Administrative Support from CSBG and describe how the funds will be used: (Attach supporting documentation in the Appendices)		
6. How will the agency track the CSBG funds used for Administrative Support?		
7. Basis for determining amount of Administrative Support needed. (Please select either Indirect Costs or Cost Allocation, not both.)		
<b>Indirect Costs</b>		
Indirect Cost Base:		
Indirect Cost Rate %:		%
Indirect cost base amount for this grant:		\$
Percent indirect allowed by funding source for this grant:		%
Dollar amount indirect allowed by funding source for this grant:		\$
<b>Cost Allocation</b>		
Percent of administrative costs allowed by funding source for this grant %:		%
Dollar amount of administrative costs allowed by funding source for this grant:		\$
8. Actual numerical calculation used to determine Administrative Support needed:		
9. Administrative Support to be applied: (choose one)	Monthly	
	Quarterly	
	Annually	

## OEO Form 225N-The Budget Narrative

<b>Section III-Budget Summary</b>			
Indirect Cost Rate Information:			
<b>Section IV-Salary and Wages</b>			
Staff Names and Positions:			
Fred Bazemore – Dir. of Agency Ops (33% CSBG;23% Management Services; 30% Housing; 14% other);			
Sherri Paysour – Self-Sufficiency & Family Advocate Manager(100% CSBG);			
Willa Hines – Receptionist/Resource& Referral Agent (75% CSBG; 25% Housing)			
Kimberly Simms – Success Coach (100% CSBG)			
Luna Williams – Orientation/Eligibility Specialist (75% CSBG; 25% Housing)			
Deborah Thomas – Executive & Program Assistant (40% CSBG; 60% Management Services)			
Shadowe Magaraci – Administrative Assistant/Data Analyst (46% CSBG; 22% Housing; 25% Mgmt Svcs; 7% other)			
James Cherry – Information & Technology Associate (40% CSBG; 60% United Way)			
Karen Forrest – Outreach Service Coord. 100% CSBG Ola Ashford – Outreach Service. Coord. 100% CSBG			
Susan Bowen - 100% CSBG			
Keith Ferger - Fiscal & Compliance Associate (50% CSBG, 50% Management Services)			
<b>Section IVa-Budget Support Data</b>			
Fringe Benefits: Calculations provided on OEO Form 225. Health insurance is provided for employee, or employee plus spouse, or employee and children depending on employee's need. Retirement at 3% of employee's salary with additional 3% if employee contributes 3%. Life and Disability insurance is offered. Employees with emp./spouse \$871 mo. or emp/child(ren) \$800 mo. health coverage is over the \$8,000 threshold. Please see attached support documentation.			
Communications: Postage: 125 pieces/mo. x \$0.465 x 12 mo; Phone/internet \$52.45/mo x 8.5 exts = \$445.82/mo x 12 mo			
<b>Section IVb-Budget Support Data</b>			
Equipment: None			
<b>Section IVc-Budget Support Data</b>			
Space Costs: 3480 Dominion St. depreciation schedule provided by auditor \$7,795 mo. X 12 mos. X 12.15%; Water/sewer; electricity; pest control; trash collection; fire & security monitoring x 12.15%			
Travel: NCCAA Spring Conference: per diem x 9 staff; NCCAA Conference registration \$375 x 9 staff; OEO Contractor Training: per diem for 5 staff ; Mileage \$1809: 56.3m/month average x 5 staff @\$0.535 (See Travel Detail form)			
Supplies/Materials: All explanations are provided in OEO Form 225			
<b>Section IVd-Budget Support Data-Contractual</b>			
Sub-contractor [DBA if applicable]	Cannon & Company	Primary Contact	Richard Tamer
Address/Phone	2160 Country Club Rd Winston-Salem, NC 27104 336-725-0635		
Service Description	Agency audit and Form 990		
Payment Arrangement	\$17,650	Contract Duration	

Sub-contractor [DBA if applicable]	Community Action Opportunities	Primary Contact	Carey Gibson
Address/Phone	25 Gaston Street Asheville, NC 28801 828-252-2495		
Service Description	AR4CA annual subscription fee		
Payment Arrangement	Pay per annual invoice	Contract Duration	Annual
Sub-contractor [DBA if applicable]	Grime Guru Janitorial Services	Primary Contact	Brigitte Hampton
Address/Phone	1531 Westbrook Plaza Dr. Suite A Winston-Salem, NC 27103 336 331-5207		
Service Description	Cleaning Service		
Payment Arrangement	\$1,500 month	Contract Duration	one year, automatically renew for one year periods on anniversary date (can be terminated at any time with 30 day written notice from either party)
Sub-contractor [DBA if applicable]	Equifax Verification Services	Primary Contact	
Address/Phone	1142 Lackland Rd. St. Louis, MO 800-328-5371		
Service Description	Income verification service		
Payment Arrangement	Billed monthly (\$13.70 per client)	Contract Duration	Ongoing
Sub-contractor [DBA if applicable]	US Bank Equipment Finance	Primary Contact	
Address/Phone	1310 Madrid St. Suite 101 Marshall, MN 56258-4002		
Service Description	Savin Copier Lease		
Payment Arrangement	\$895	Contract Duration	3-8-17 to 4-8-22
<b>Section IVe-Budget Support Data</b>			
Client Services: Based on program eligibility and individual needs of client			
Other: Property and general liability on main office prorated by occupancy; NCCAA annual agency dues			

**AGENCY BUDGET INFORMATION**

Budget Type:  Annual Application:  X    Amendment:     Budget Change:

**Section 1. IDENTIFICATION**

Agency Name: EXPERIMENT IN SELF-RELIANCE, INC.      Contract Period: July 1, 2018 - June 30, 2019

**SECTION II. CONTRACT SUMMARY**

CSBG	Total Direct Costs	Total Indirect Costs	Admin. Support (CSBG Only)	Total Contract Amount
	\$507,157	\$109,395		\$616,552
<b>TOTAL OEO CONTRACT AMOUNT</b>				<b>\$616,552</b>

**CSBG ADMINISTRATIVE SUPPORT:** Insert name of program supported by CSBG and the amount of support indicated on the Administrative Support Worksheet (OEO Form 212A).

(Insert Program Name)       (Insert Program Name)

**SECTION III. BUDGET SUMMARY**

OBJECT CATEGORIES	Self Sufficiency	OTHER GRANTS	PROGRAM TOTALS	COUNTY TOTALS
Salaries & Wages	\$316,868		\$316,868	\$316,868
Fringe Benefits	\$98,714		\$98,714	\$98,714
Equipment				
Communication	\$6,048		\$6,048	\$6,048
Space Cost	\$13,970		\$13,970	\$13,970
Travel	\$13,800		\$13,800	\$13,800
Supplies/Materials	\$4,800		\$4,800	\$4,800
Contractual	\$20,056		\$20,056	\$20,056
Client Services	\$28,275		\$28,275	\$28,275
Other	\$4,626		\$4,626	\$4,626
<b>Total Direct Costs</b>	<b>\$507,157</b>		<b>\$507,157</b>	<b>\$507,157</b>
<b>Indirect Costs</b>				
Approved Rate: 25.44%	\$109,395		\$109,395	\$109,395
Base : Total Direct Costs				
<b>TOTALS</b>	<b>\$616,552</b>		<b>\$616,552</b>	<b>\$616,552</b>

EXPERIMENT IN SELF-RELIANCE, INC.

SECTION IV. - SALARIES AND FRINGE BENEFITS

Position Title	Annual Salary & Wages	No. of Months	CSBG Salary	% CSBG Share FTE's	Fringe Type (Itemize)	Benefit Amount /	Months or %		Total Fringes	Self Sufficiency		
										%	Fringes	Salary
Director of Agency Operations	\$53,667	12	\$17,710	33.00%	FICA	\$17,710	X 7.6500	%	= \$ 1,355	100.00%	\$1,355	\$17,710
					UIB	\$7,755	X 0.2000	%	= \$ 16	100.00%	\$16	
					Health Ins	\$201	X 12.0000	Month	= \$ 2,412	100.00%	\$2,412	
					Life Ins	\$3	X 12.0000	Month	= \$ 36	100.00%	\$36	
					Retirement	\$17,710	X 6.0000	%	= \$ 1,063	100.00%	\$1,063	
					Workers Comp	\$17,710	X 0.3500	%	= \$ 62	100.00%	\$62	
					Disability	\$5	X 12.0000	Month	= \$ 60	100.00%	\$60	
Self-Sufficiency & Family Advocate Service Manager	\$45,407	12	\$45,407	100.00%	FICA	\$45,407	X 7.6500	%	= \$ 3,474	100.00%	\$3,474	\$45,407
					UIB	\$23,500	X 0.2000	%	= \$ 47	100.00%	\$47	
					Health Ins	\$436	X 12.0000	Month	= \$ 5,232	100.00%	\$5,232	
					Life Ins	\$13	X 12.0000	Month	= \$ 161	100.00%	\$161	
					Retirement	\$45,407	X 6.0000	%	= \$ 2,724	100.00%	\$2,724	
					Workers Comp	\$45,407	X 0.3500	%	= \$ 159	100.00%	\$159	
					Disability	\$23	X 12.0000	Month	= \$ 276	100.00%	\$276	
Receptionist/Resource & Referral Agent	\$25,641	12	\$19,231	75.00%	FICA	\$19,231	X 7.6500	%	= \$ 1,471	100.00%	\$1,471	\$19,231
					UIB	\$17,625	X 0.2000	%	= \$ 35	100.00%	\$35	
					Health Ins	\$327	X 12.0000	Month	= \$ 3,924	100.00%	\$3,924	
					Life Ins	\$10	X 12.0000	Month	= \$ 120	100.00%	\$120	
					Retirement	\$19,231	X 6.0000	%	= \$ 1,154	100.00%	\$1,154	
					Workers Comp	\$19,231	X 0.3500	%	= \$ 67	100.00%	\$67	
					Disability	\$11	X 12.0000	Month	= \$ 132	100.00%	\$132	
Outreach Service Coordinator	\$37,391	12	\$37,391	100.00%	FICA	\$37,391	X 7.6500	%	= \$ 2,860	100.00%	\$2,860	\$37,391
					UIB	\$23,500	X 0.2000	%	= \$ 47	100.00%	\$47	
					Health Ins	\$436	X 12.0000	Month	= \$ 5,232	100.00%	\$5,232	
					Life Ins	\$10	X 12.0000	Month	= \$ 120	100.00%	\$120	
					Retirement	\$37,391	X 6.0000	%	= \$ 2,243	100.00%	\$2,243	
					Workers Comp	\$37,391	X 0.3500	%	= \$ 131	100.00%	\$131	
					Disability	\$15	X 12.0000	Month	= \$ 180	100.00%	\$180	
Outreach Service Coordinator	\$36,852	12	\$36,852	100.00%	FICA	\$36,852	X 7.6500	%	= \$ 2,819	100.00%	\$2,819	\$36,852
					UIB	\$23,500	X 0.2000	%	= \$ 47	100.00%	\$47	
					Health Ins	\$436	X 12.0000	Month	= \$ 5,232	100.00%	\$5,232	
					Life Ins	\$10	X 12.0000	Month	= \$ 120	100.00%	\$120	
					Retirement	\$36,852	X 6.0000	%	= \$ 2,211	100.00%	\$2,211	
					Workers Comp	\$36,852	X 0.3500	%	= \$ 129	100.00%	\$129	
					Disability	\$15	X 12.0000	Month	= \$ 180	100.00%	\$180	
TOTAL FRINGES			\$45,532					\$45,532		\$45,532		
TOTAL SALARIES			\$156,591								156,591	
TOTAL FTE's												

EXPERIMENT IN SELF-RELIANCE, INC.

SECTION IV. - SALARIES AND FRINGE BENEFITS

Position Title	Annual Salary & Wages	No. of Months	CSBG Salary	% CSBG Share FTE's	Fringe Type (Itemize)	Benefit Amount /	Months or %		Total Fringes	Self Sufficiency		
										%	Fringes	Salary
Orientation/Eligibility Specialist	\$31,476	12	\$23,607	75.00%	FICA	\$23,607	X 7.6500	%	= \$ 1,806	100%	\$1,806	\$23,607
					UIB	\$17,625	X 0.2000	%	= \$ 35	100%	\$35	
					Health Ins	\$327	X 12.0000	Month	= \$ 3,924	100%	\$3,924	
					Life Ins	\$7	X 12.0000	Month	= \$ 84	100%	\$84	
					Retirement	\$23,607	X 6.0000	%	= \$ 1,416	100%	\$1,416	
					Workers Comp	\$23,607	X 0.3500	%	= \$ 83	100%	\$83	
					Disability	\$10	X 12.0000	Month	= \$ 120	100%	\$120	
Administrative Asst. & Data Analyst	\$37,591	12	\$17,292	46.00%	FICA	\$17,292	X 7.6500	%	= \$ 1,323	100%	\$1,323	\$17,292
					UIB	\$10,810	X 0.2000	%	= \$ 22	100%	\$22	
					Health Ins	\$201	X 12.0000	Month	= \$ 2,412	100%	\$2,412	
					Life Ins	\$6	X 12.0000	Month	= \$ 72	100%	\$72	
					Retirement	\$17,292	X 6.0000	%	= \$ 1,038	100%	\$1,038	
					Workers Comp	\$17,292	X 0.3500	%	= \$ 61	100%	\$61	
					Disability	\$9	X 12.0000	Month	= \$ 108	100%	\$108	
Success Coach	\$33,678	12	\$33,678	100.00%	FICA	\$33,678	X 7.6500	%	= \$ 2,576	100%	\$2,576	\$33,678
					UIB	\$23,500	X 0.2000	%	= \$ 47	100%	\$47	
					Health Ins	\$436	X 12.0000	Month	= \$ 5,232	100%	\$5,232	
					Life Ins	\$11	X 12.0000	Month	= \$ 132	100%	\$132	
					Retirement	\$33,678	X 6.0000	%	= \$ 2,021	100%	\$2,021	
					Workers Comp	\$33,678	X 0.3500	%	= \$ 118	100%	\$118	
					Disability	\$18	X 12.0000	Month	= \$ 216	100%	\$216	
Success Coach	\$30,000	12	\$30,000	100.00%	FICA	\$30,000	X 7.6500	%	= \$ 2,295	100%	\$2,295	\$30,000
					UIB	\$23,500	X 0.2000	%	= \$ 47	100%	\$47	
					Health Ins	\$436	X 12.0000	Month	= \$ 5,232	100%	\$5,232	
					Life Ins	\$9	X 12.0000	Month	= \$ 108	100%	\$108	
					Retirement	\$29,870	X 6.0000	%	= \$ 1,792	100%	\$1,792	
					Workers Comp	\$29,870	X 0.3500	%	= \$ 105	100%	\$105	
					Disability	\$14	X 12.0000	Month	= \$ 168	100%	\$168	
					FICA		X 7.6500	%		100%		
					UIB		X 0.2000	%		100%		
					Health Ins		X 12.0000	Month		100%		
					Life Ins		X 12.0000	Month		100%		
					Retirement		X 6.0000	%		100%		
					Workers Comp		X 0.3500	%		100%		
Disability		X 12.0000	Month		100%							
TOTAL FRINGES			\$32,591						\$32,591	\$32,591		
TOTAL SALARIES			\$104,577								\$104,577	
TOTAL FTE's												



EXPERIMENT IN SELF-RELIANCE, INC.

SECTION IV. - SALARIES AND FRINGE BENEFITS

Position Title	Annual Salary & Wages	No. of Months	CSBG Salary	% CSBG Share FTE's	Fringe Type (Itemize)	Benefit Amount /	Months or %		Total Fringes	Self Sufficiency					
										%	Fringes	Salary			
Executive and Program Assistant	\$47,874	12	\$19,150	40.00%	FICA	\$19,150	X 7.6500	%	= \$ 1,465	100%	\$1,465	\$19,150			
					UIB	\$9,400	X 0.2000	%	= \$ 19	100%	\$19				
					Health Ins	\$349	X 12.0000	Month	= \$ 4,188	100%	\$4,188				
					Life Ins	\$5	X 12.0000	Month	= \$ 60	100%	\$60				
					Retirement	\$19,150	X 6.0000	%	= \$ 1,149	100%	\$1,149				
					Workers Comp	\$19,150	X 0.3500	%	= \$ 67	100%	\$67				
					Disability	\$8	X 12.0000	Month	= \$ 96	100%	\$96				
IT Associate	\$41,375	12	\$16,550	40.00%	FICA	\$16,550	X 7.6500	%	= \$ 1,266	100%	\$1,266	\$16,550			
					UIB	\$9,400	X 0.2000	%	= \$ 19	100%	\$19				
					Health Ins	\$349	X 12.0000	Month	= \$ 4,188	100%	\$4,188				
					Life Ins	\$4	X 12.0000	Month	= \$ 48	100%	\$48				
					Retirement	\$16,550	X 6.0000	%	= \$ 993	100%	\$993				
					Workers Comp	\$16,550	X 0.3500	%	= \$ 58	100%	\$58				
					Disability	\$7	X 12.0000	Month	= \$ 84	100%	\$84				
													100%		
														100%	
														100%	
														100%	
														100%	
Finance and Compliance Assoc.	\$40,000	12	\$20,000	50.00%	FICA	\$20,000	X 7.6500	%	= \$ 1,530	100%	\$1,530	\$20,000			
					UIB	\$11,750	X 0.2000	%	= \$ 24	100%	\$24				
					Health Ins	\$436	X 9.0000	Month	= \$ 3,924	100%	\$3,924				
					Life Ins	\$6	X 9.0000	Month	= \$ 54	100%	\$54				
					Retirement	\$20,000	X 6.0000	%	= \$ 1,200	100%	\$1,200				
					Workers Comp	\$20,000	X 0.3500	%	= \$ 70	100%	\$70				
					Disability	\$10	X 9.0000	Month	= \$ 90	100%	\$90				
<b>TOTAL FRINGES</b>			<b>\$20,591</b>						<b>\$20,591</b>	<b>\$20,591</b>					
<b>TOTAL SALARIES</b>			<b>\$55,700</b>								<b>\$55,700</b>				
<b>TOTAL FTE's</b>															

EXPERIMENT IN SELF-RELIANCE, INC.

SECTION IVa. - BUDGET SUPPORT DATA

COST CATEGORY				Self Sufficiency	OTHER GRANTS	TOTAL
EQUIPMENT	Description	Quantity	Unit Price			
<b>TOTAL EQUIPMENT</b>						
<b>COMMUNICATIONS</b>						
	Postage \$58.17/month x 12 months			\$698		\$698
	\$52.45 avg. /mo. X 8.5 extensions out of 42 total = 445.82 x 12 mos.			\$5,350		\$5,350
<b>TOTAL COMMUNICATIONS</b>				\$6,048		\$6,048

**SECTION IVb - BUDGET SUPPORT DATA**

<b>COST CATEGORY</b>		<b>Self Sufficiency</b>	<b>OTHER GRANTS</b>	<b>TOTAL</b>
<b>SPACE COST</b>				
3480 Dominion Street depreciation \$7,795 mo. X 12 mos. X 12.15%		\$11,365		\$11,365
water/sewer \$256 mo. X 12 mos. X 12.15%		\$373		\$373
electricity \$1,128 mo. X 12 mos. X 12.15%		\$1,645		\$1,645
trash collection \$77 mo. X 12 mos. X 12.15%		\$112		\$112
pest control \$85 mo. X 12 mos. X 12.15%		\$124		\$124
Fire and security monitoring \$19 mo. X 12 mos. X 12.15%		\$28		\$28
HVAC maintenance \$143 mo. X 12 mos. X 12.15%		\$208		\$208
Fire inspection \$79 mo. X 12 mos. X 12.15%		\$115		\$115
<b>TOTAL SPACE COSTS</b>		<b>\$13,970</b>		<b>\$13,970</b>
<b>TRAVEL</b>				
Local Travel 5 staff x 56.3 miles x .535 x 12 months= \$1809		\$1,809		\$1,809
CSBG Staff Planned Training	11990.8	\$11,991		\$11,991
Board Member Planned Training				
<b>TOTAL TRAVEL</b>		<b>\$13,800</b>		<b>\$13,800</b>
<b>SUPPLIES/MATERIALS</b>				
Office & computer supplies (pens, paper, folders, clips, pads, calendars, planners, etc.) \$350 mo. Avg. x 12 mos		\$4,200		\$4,200
Janitorial supplies (paper towels, tissue, etc.) \$50 mo. Avg. x 12 mos.		\$600		\$600
<b>TOTAL SUPPLIES/MATERIALS</b>		<b>\$4,800</b>		<b>\$4,800</b>



EXPERIMENT IN SELF-RELIANCE, INC.

SECTION IVc. - BUDGET SUPPORT DATA

COST CATEGORY		Self Sufficiency	OTHER GRANTS	TOTAL
<b>CONTRACTUAL</b>				
Audit (Per Cost Allocation Plan) Cannon & Co. \$651.67 x 12 mos.		\$7,820		\$7,820
Other (specify)				
AR4CA Master Subscription agreement \$483.33 mo. X 12 mos.		\$5,800		\$5,800
Savin Copier lease \$895.00 mo. X 12 mos. X 30%		\$3,222		\$3,222
Cleaning Service for 3480 Dominion Street (Grime Guru Janitorial Serv.) \$1,500 mo. X 12 mos. X 12.15%		\$2,187		\$2,187
Equipax verification services (Income & Employment)				
The Work Number \$3.75 + \$9.95 = \$13.70 x 75 clients (estimated)		\$1,027		\$1,027
		\$20,056		\$20,056

**SECTION IVd. - BUDGET SUPPORT DATA**

COST CATEGORY	Self Sufficiency	OTHER GRANTS	TOTAL
<b>CLIENT SERVICES</b>			
Financial Literacy Training classes \$600 per class x 18 classes	\$4,000		\$4,000
Rent \$598.93 mo. Avg. x 125 clients	\$4,000		\$4,000
Utilities \$350 mo. Avg. x 125 clients	\$4,000		\$4,000
Truck Driver Training \$2,785 x 3 clients	\$8,355		\$8,355
Tuition/Fees (WSSU, FTCC, Mt. Eagle, etc.) \$1,500 x 40	\$3,000		\$3,000
Testing Fees for Licenses (RN, etc.) \$275 avg. x 4 clients	\$1,100		\$1,100
Textbooks, class supplies \$700 avg. x 40 clients	\$795		\$795
Childcare \$350 avg. x 10 clients x 3 mos.	\$1,000		\$1,000
Thirty day bus passes \$27 x 75 clients	\$2,025		\$2,025
<b>TOTAL CLIENT SERVICES</b>	<b>\$28,275</b>		<b>\$28,275</b>
<b>OTHER (specify)</b>			
Property and general liability insurance 3480 Dominion Street \$938 month x 12 mos. X 12.15%	\$1,368		\$1,368
NCCAA Agency membership \$271.50 mo. X 12 mos.	\$3,258		\$3,258
<b>TOTAL OTHER</b>	<b>\$4,626</b>		<b>\$4,626</b>

**TOTAL AGENCY BUDGET**

AGENCY EXPERIMENT IN SELF-RELIANCE, INC.

FISCAL YEAR July 1, 2018 - June 30, 2019

Please check one

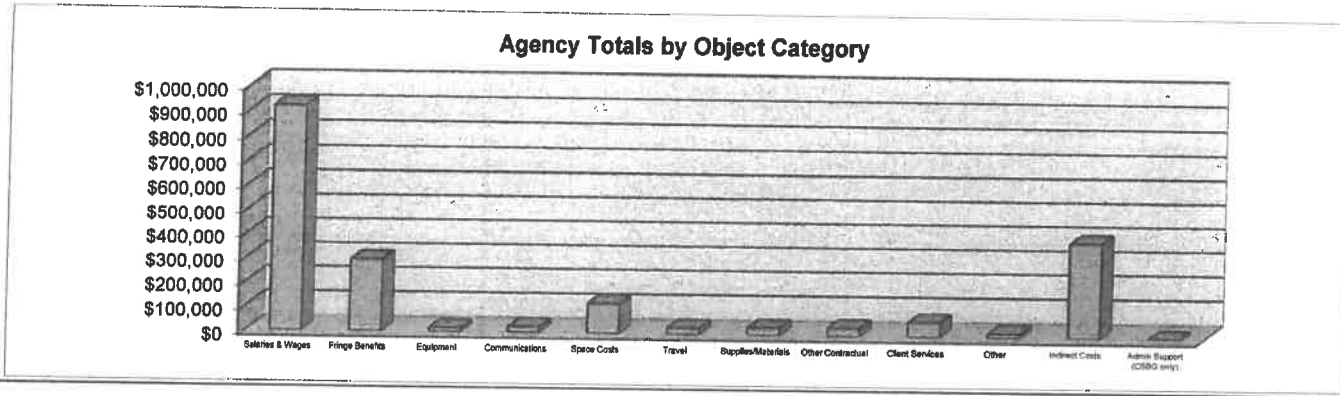
INDIRECT COST BASE:	<input checked="" type="checkbox"/> Total Direct Costs	<input type="checkbox"/> Salaries/Wages	<input type="checkbox"/> Salaries/Fringes
INDIRECT COST RATE:	24.7%		

OBJECT CATEGORIES	PROGRAM NAMES										TOTAL	
	CSBG	UNITED WAY ASSET BLDG. CONNECT	UNITED WAY PLACE MATTERS LER	UWAY PLACE MATTERS SA	HOUSING SERVICES	BUILDING BLOCKS FAM. CHILDREN	IDA	FORSYTH FREE TAX	LOCAL	(Insert Program Name)		
Salaries & Wages	\$316,868	\$32,378	\$8,393	\$29,874	\$253,159	\$96,000	\$88,369	\$95,146				\$920,187
Fringe Benefits	\$98,714	\$18,080	\$805	\$2,865	\$92,352	\$34,294	\$34,611	\$13,090				\$294,811
Equipment				\$1,500	\$12,000							\$13,500
Communication	\$6,048		\$100	\$1,000	\$8,500	\$1,750	\$2,400	\$2,900				\$22,698
Space Cost	\$13,970				\$58,002	\$4,000		\$3,014	\$42,793			\$121,779
Travel	\$13,800		\$758	\$500	\$6,000	\$1,800	\$1,000	\$1,000				\$24,858
Supplies/Materials	\$4,800		\$1,000	\$5,852	\$7,500	\$1,500	\$4,000	\$4,000	\$1,165			\$29,817
Contractual	\$20,056				\$11,000				\$1,500			\$32,556
Client Services	\$28,275	\$2,440	\$600		\$13,855	\$4,656	\$10,000					\$59,826
Other	\$4,626		\$2,000	\$500	\$2,500		\$2,000	\$2,750	\$1,000			\$15,376
<b>Total Direct Costs</b>	<b>\$507,157</b>	<b>\$52,898</b>	<b>\$13,656</b>	<b>\$42,091</b>	<b>\$464,868</b>	<b>\$144,000</b>	<b>\$142,380</b>	<b>\$121,900</b>	<b>\$46,458</b>			<b>\$1,535,408</b>
Indirect Costs	\$109,395	\$13,050	\$3,369	\$10,384	\$114,683	\$35,525	\$35,125	\$30,073	\$38,979			\$390,583
Admin Support (CSBG only)												
<b>Total Costs</b>	<b>\$616,552</b>	<b>\$65,948</b>	<b>\$17,025</b>	<b>\$52,475</b>	<b>\$579,551</b>	<b>\$179,525</b>	<b>\$177,505</b>	<b>\$151,973</b>	<b>\$85,437</b>			<b>\$1,925,991</b>

OBJECT CATEGORIES	PROGRAM NAMES										TOTAL
	(Insert Program Name)	(Insert Program Name)	(Insert Program Name)	(Insert Program Name)	(Insert Program Name)	(Insert Program Name)	(Insert Program Name)	(Insert Program Name)	(Insert Program Name)	OTHER	
Salaries & Wages											
Fringe Benefits											
Equipment											
Communications											
Space Costs											
Travel											
Supplies/Materials											
Contractual											
Client Services											
Other											
<b>Total Direct Costs</b>											
Indirect Costs											
<b>Total Costs</b>											

**TOTALS BY OBJECT CATEGORY**

<b>OBJECT CATEGORY</b>	<b>TOTALS</b>
Salaries & Wages	\$920,187
Fringe Benefits	\$294,811
Equipment	\$13,500
Communications	\$22,698
Space Costs	\$121,779
Travel	\$24,858
Supplies/Materials	\$29,817
Other Contractual	\$32,556
Client Services	\$59,826
Other	\$15,376
<b>Total Direct Costs</b>	<b>\$1,535,408</b>
Indirect Costs	\$390,583
Admin Support (CSBG only)	
<b>Agency Totals</b>	<b>\$1,925,991</b>





COUNTY BUDGET

FISCAL YEAR

July 1, 2018 - June 30, 2019

AGENCY

EXPERIMENT IN SELF-RELIANCE, INC.

	COUNTY NAME (S)										TOTAL
	FORSYTH	(County)	(County)	(County)	(County)	(County)	(County)	(County)	(County)	(County)	
Per County Allocation	\$616,552										
<b>Expense Categories</b>											
Salaries & Wages	\$316,868										\$316,868
Fringe Benefits	\$98,714										\$98,714
Equipment											
Communication	\$6,048										\$6,048
Space Costs	\$13,970										\$13,970
Travel	\$13,800										\$13,800
Supplies/Materials	\$4,800										\$4,800
Contractual	\$20,056										\$20,056
Client Services	\$28,275										\$28,275
Other	\$4,626										\$4,626
Total Direct Costs	\$507,157										\$507,157
Indirect Costs	\$109,395										\$109,395
Admin Support (CSBG only)											
<b>Total Costs</b>	<b>\$616,552</b>										<b>\$616,552</b>