

FORSYTH COUNTY
BOARD OF COMMISSIONERS

**BRIEFING
DRAFT**

MEETING DATE: JANUARY 9, 2017

AGENDA ITEM NUMBER: 15

**SUBJECT: RESOLUTION ACKNOWLEDGING RECEIPT AND REVIEW OF THE 2017-2018
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 2017-2018 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 2017-2018 Community Services Block Grant Application in the amount of \$1,109,642 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 2017-2018 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 2017-2018 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 207 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 9th day of January 2017.

North Carolina Department of Health and Human Services

Division of Social Services



Community Services Block Grant Program

**Fiscal Year 2017-18 Application for Funding
Project Period July 1, 2017 – June 30, 2018
Application Due Date: February 13, 2017**

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:	Jerry Romans
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:	twana.roebuck@eistr.org
Agency Fiscal Officer:	Debra Perkins
Fiscal Officer Email Address:	debra.perkins@eistr.org
CSBG Program Director:	Fred Bazemore
CSBG Program Director Email Address:	fred.bazemore@eistr.org
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 - Verna P. Best, Director
2420 Mail Service Center / Raleigh, North Carolina 27699-2420

**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 14, 2016 as required by 10A NCAC 97C .0111(b)(1)(A).

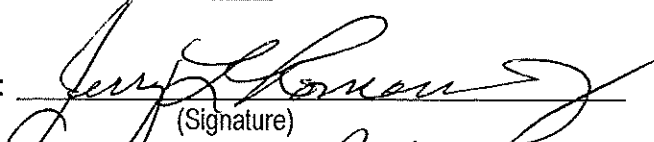
For multi-county providers, indicate the county and date the application for funding was presented to the Board of County Commissioners as required by 10A NCAC 97C .0111(B).


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 14, 2016

Board Chairperson:  December 14, 2016
 (Signature) (Date)

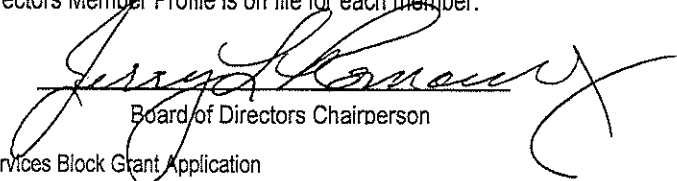
Finance Committee Chairperson:  December 14, 2016
 (Signature) (Date)

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]
Representatives of the Poor					
1. Naomi S. Blackmon	Forsyth	Southside	09/09/2015	0	09/30/18
2. Howard Brown	Forsyth	Veterans	09/09/2015	0	09/30/18
3. Minnie Ervin	Forsyth	Gilmer, Bon-Air, 28th	04/01/2014	0	04/30/17
4. Mary Ford	Forsyth	Thurmond	12/14/2011	1	12/31/17
5. Chenita Johnson	Forsyth	North Winston	09/14/2011	1	09/30/17
6. Amatullah Saleem	Forsyth	Alder Pt.	01/09/2013	1	01/31/19
7. Jose Perez, Jr.	Forsyth	Homeless Council	01/13/2016	0	04/30/2017
Public Elected Officials					
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	0	09/30/17
4. Phillip Carter Sr.	Forsyth	County	09/14/2014	0	09/30/17
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
Representatives of Private Organizations					
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. David Clayton	Forsyth	Winston-Salem Police (Retired)	02/13/2013	1	01/31/18
4. Michael E. Harris	Forsyth	Forsyth Tech/Workforce Development	04/09/2014	0	04/30/17
5. David Myers	Forsyth	Wake Forest	11/18/2015	0	11/30/18
6. Laura Leigh Oyler	Forsyth	Reynolds American	10/14/2015	0	10/30/18
7. Jerry Romans	Forsyth	RJ Reynolds	01/14/2015	0	02/28/18

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

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
Howard Brown	807 Lisa Run Court Kernersville, NC 27284	howard.brown@va.gov
Minnie Ervin	111 W. 28 th Street Winston-Salem, NC 27105	Mestone@Triad.rr.com
Mary Ford	1300 Woodruff Glen Drive Winston-Salem, NC 27105	Poford2001@yahoo.com
Chenita Johnson	2411 N. Patterson Avenue Winston-Salem, NC 27105	chenitajohn@hotmail.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	bburley@woodforest.com
Phillip Carter Sr.	1148 E 5 th Street, Apt.C Winston-Salem, NC 27101	Phillip_c9@yahoo.com/
Chester David	1906 Brantley St. Winston-Salem, NC 27103	csdavid@triad.rr.com
LaMonica Sloan	301 Thompson Center Winston-Salem, NC 27110	lamonicasloan@gmail.com
Jose Perez, Jr.	1110 East Seventh St. Winston-Salem, NC 27101	Perezj2@forsyth.cc
Rebecca Bender	439 Horace Mann Avenue Winston-Salem, NC 27104	rebecca.bender@hanes.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
Michael E. Harris	2100 Silas Creek Pkwy Winston-Salem, NC 27103	mharris@forsythtech.edu
David Myers	PO Box 7227 Winston-Salem, NC 27109	myerdmll@wfu.edu
Laura Leigh Oyler	401 N. Main Street Winston-Salem, NC 27101	oylerl@rjrt.com
Jerry Romans	401 N. Main Street Winston-Salem, NC 27101	romansj@rjrt.com
Gloria M. Samuels	3733 Ogburn Avenue Winston-Salem, NC 27116	
Tanya Bellanger	1977 Sentry Pointe Lane Winston-Salem, NC 27127	toliphant10@gmail.com

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*
Officers of the Board			
Jerry Romans	Chairperson	Private	Forsyth
David Clayton	Vice Chair	Private	Forsyth
Chenita Johnson	Secretary	Poor	Forsyth
Amatullah Saleem	Assistant Secretary	Poor	Forsyth
Rebecca Bender	Treasurer	Private	Forsyth
Committee Name: Executive			
Jerry Romans	Chairperson	Elected	Forsyth
David Clayton	Vice Chair	Private	Forsyth
Chenita Johnson	Secretary	Poor	Forsyth
Amatullah Saleem	Assistant Secretary	Poor	Forsyth
Rebecca Bender	Treasurer	Private	Forsyth
Jerry Romans	Chairperson	Elected	Forsyth
David Clayton	Vice Chair	Private	Forsyth
Chenita Johnson	Secretary	Poor	Forsyth
Laura Leigh Oyler	HR Chair	Private	Forsyth
Committee Name: Finance			
Rebecca Bender	Chairperson	Private	Forsyth
LaShun Huntley		Private	Forsyth
Adam Neiberg		Elected	Forsyth
Chester David		Elected	Forsyth
Tonya Bellanger		Elected	Forsyth
Naomi S. Blackmon		Poor	Forsyth
Howard Brown		Poor	Forsyth
Minnie Ervin		Poor	Forsyth
Committee Name: Development & Fundraising			
LaMonica Sloan	Chairperson	Elected	Forsyth
Minnie Ervin		Poor	Forsyth
Chenita Johnson		Poor	Forsyth
Jose Perez		Poor	Forsyth
Michael E. Harris		Private	Forsyth
Phillip Carter		Private	Forsyth
David Myers		Private	Forsyth
Committee Name: Plans & Objectives			
Jerry Romans	Chairperson	Private	Forsyth
LaMonica Sloan		Elected	Forsyth
Naomi Blackmon		Poor	Forsyth
Mary Ford		Poor	Forsyth
Amatullah Saleem		Poor	Forsyth
Adam Neiberg		Private	Forsyth
David Myers		Private	Forsyth
Committee Name: Program			
Chester David	Chairperson	Elected	Forsyth
David Claytom		Private	Forsyth
Brian P. Burley		Elected	Forsyth
Amatullah Saleem		Poor	Forsyth
Minnie Ervin		Poor	Forsyth
Howard Brown		Poor	Forsyth
Michael E. Harris		Private	Forsyth
Gloria M. Samuels		Elected	Forsyth

Committee Name: Human Resources			
Laura Leigh Oyler	Chairperson	Private	Forsyth
Brian P. Burley		Elected	Forsyth
LaMonica Sloan		Elected	Forsyth
Chenita Johnson		Poor	Forsyth
LaShun Huntley		Private	Forsyth
Jose Perez		Poor	Forsyth
Mary Ford		Poor	Forsyth
Committee Name: Nominating			
Jerry Romans	Chairperson	Private	Forsyth
Phillip Carter Sr.		Elected	Forsyth
Howard Brown		Poor	Forsyth

*To be completed by agencies serving multiple counties.

**Community Services Block Grant Program
Fiscal Year 2017-18 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 communities 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 this year's Plan).

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, 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

**Community Services Block Grant Program
Fiscal Year 2017-18 Application for Funding
Planning Process Narrative (continued)**

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.

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 their own personal savings accounts, and have access to other banking products and services. Previously unbanked clients gain knowledge and confidence with this experience.
- 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.

**Community Services Block Grant Program
Fiscal Year 2017-18 Application for Funding
Planning Process Narrative (continued)**

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

This year we are collaborating 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 will be working with families of children in Ashley, Easton, Petree and Forest Park Elementary schools, 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 of the target area in our program to provide mentoring and social/emotional support to our clients. We anticipate enrolling 140 client families in this activity (35 per school).

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.

**Community Services Block Grant Program
Fiscal Year 2017-18 Application for Funding
Planning Process Narrative (continued)**

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 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 will work 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. The schools the program will serve are Easton, Petree, Ashley, and Forest Park elementary schools.

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

**Community Services Block Grant Program
Fiscal Year 2017-18 Application for Funding
Planning Process Narrative (continued)**

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. As part of our #GIVINGTUESDAY fundraising activities, we request food donations to stock our pantry.

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 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.

**Community Services Block Grant Program
Fiscal Year 2017-18 Application for Funding
Planning Process Narrative (continued)**

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.

This year we will 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 children. Reynolds American will be a partner in this program, as will 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. Such referrals are made on a case by case basis.

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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.¹ 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.¹

- (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.

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

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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

A frightening 41% of children in Winston-Salem are living below the poverty level. Of these, in the under 5 age group, males and females were approximately 50%. In adults aged 18-24 who were poor, the genders were still more or less even, though more young women were likely to be poor (46.3% versus 44%) than young men. This gap widens (33.9% female versus 20.4% male) in the 25-34 age bracket, even as the overall percentage of persons in poverty declines.

Based on information from City-Data.com, the percentage of Forsyth County residents living in poverty was 20.8%. This included 33% of African American residents and 52% of Hispanic or Latino Residents. Read more: http://www.city-data.com/county/Forsyth_County-NC.html#ixzz3tkLdebik

Single parent families with female heads of household made up 59.4% of poor households in Winston-Salem.

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

(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 services are unavailable, as well. As poor families struggle to find ways to survive, they find themselves back in the same cycle of having 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.

**Community Services Block Grant Program
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Agency Strategy for Eliminating Poverty

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

(E) Resources Available:

- a. Agency Resources:
 - Burton Street Shelter
 - Fifth Street Permanent Housing Facility
 - WSSU 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
 Kate B. Reynolds Charitable Trust
 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)
 Department of Labor
 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
 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
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OEO Form 210**

Agency Strategy for Eliminating Poverty

(F) Resources Needed:

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

Section III: Objective and Strategy

(G) Objective Statement:

To move 207 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.

Collaboration of services 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:

- a. Changing savings/spending habits,
- b. Creating a realistic family budget,
- c. Persuading families to take advantage of Earned Income Tax Credits (EITC), free tax preparation services and to make wise use of their tax refund money,
- d. Promoting savings, investment, wealth accumulation, and asset building as a way to increase net worth,
- e. Promoting asset accumulation as a new tool for combating generational poverty,

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Agency Strategy for Eliminating Poverty

- f. Introducing clients to the Individual Development Account program as a new tool to combat generational poverty,
- g. Introducing 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.
- h. 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.
- i. 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 2017-18 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 207 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, 2017	To	June 30, 2018	Plan Year	2	of	3
6. CSBG Funds Requested for this Project:	1,109,642						
7. Total Number Expected to Be Served:	350						
a. Expected Number of New Clients	230						
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
Objective: To provide 350 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, 2017 through June 30, 2018.							
1. 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.		Director of Agency Operations (Agency Ops) Self-Sufficiency & Family Advocate Service Manager (SSFA Manager) Outreach Service Coordinator (Outreach Coordinator) Success Coach Executive & Program Assistant (Exec Asst) Administrative Assistant & Data Analyst (Admin/Data) Orientation/Eligibility Specialist (Orientation) Receptionist/Resource & Referral Agent (Reception) Information & Technology Associate (IT)		178 (58 new)	234 (56 new)	292 (58 new)	350 (58 new)

**Community Services Block Grant Program
Fiscal Year 2016-17 Application for Funding
One-Year Work Program
OEO Form 212 (continued)**

Section II: One-Year CSBG Program Objective and Activities (continued)					
Activities	Position Title(s)	Implementation Schedule			
		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
2. As part of 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 Orientation Reception	58 (58 new)	114 (56 new)	172 (58 new)	230 (58 new)
3. 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	58 (58 new)	114 (56 new)	172 (58 new)	230 (58 new)
4. 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	178 (58 new)	234 (56 new)	292 (58 new)	350 (58 new)
5. 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 (250 new)
6. 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	178 (58 new)	234 (56 new)	292 (58 new)	350 (58 new)

**Community Services Block Grant Program
Fiscal Year 2017-18 Application for Funding
One-Year Work Program
OEO Form 212 (continued)**

Section II: One-Year CSBG Program Objective and Activities (continued)					
Activities	Position Title(s)	Implementation Schedule			
		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
7. 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	178 (58 new)	234 (56 new)	292 (58 new)	350 (58 new)
8. 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	178 (58 new)	234 (56 new)	292 (58 new)	350 (58 new)
9. 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.	Agency Ops SSFA Manager Outreach Coordinator	1 (1 new)	2 (1 new)	3 (1 new)	4 (1 new)
10. 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	178 (58 new)	234 (56 new)	292 (58 new)	350 (58 new)
11. Provide outreach staff to JobLink, ESC, and Goodwill to 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	72 hours outreach services (72 new)	144 hours outreach services (72 new)	216 hours outreach services (72 new)	288 hours outreach services (72 new)

**Community Services Block Grant Program
Fiscal Year 2017-18 Application for Funding
One-Year Work Program
OEO Form 212 (continued)**

**Section II: One-Year CSBG Program Objective and Activities
(continued)**

Activities	Position Title(s)	Implementation Schedule			
		First Quarter	Second Quarter	Third Quarter	Fourth Quarter
12. 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)
13. 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 Schools Coordinator				May 2018
14. 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
15. 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.	Agency Ops SSFA Manager Outreach Coordinator Success Coach Admin/Data	178 (58 new)	234 (56 new)	292 (58 new)	350 (58 new)
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	178 (58 new)	234 (56 new)	292 (58 new)	350 (58 new)

**Community Services Block Grant Program
Fiscal Year 2017-18 Application for Funding
One-Year Work Program
OEO Form 212 (continued)**

Section II: One-Year CSBG Program Objective and Activities (continued)						
Activities	Position Title(s)	Implementation Schedule				
		First Quarter	Second Quarter	Third Quarter	Fourth Quarter	
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	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. Continue collaborative strategies through all ESR programs. CSBG funded staff provide offsite services at Forsyth Technical Community College as a liaison for ESR clients with educational needs. CSBG funded staff provide offsite services at the Department of Commerce/Division of Workforce Solutions and Goodwill to act as a liaison with ESR clients for employment training opportunities.	Agency Ops SSFA Manager IT Outreach Coordinator Success Coach Exec Asst Admin/Data Orientation Reception	192 hours (192 new)	384 hours (192 new)	576 hours (192 new)	768 hours (192 new)	
19. Continue expanding the NC Saves Project. This project assists clients in opening interest bearing savings accounts at local banks with no service charges. 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	178 (58 new)	234 (56 new)	292 (58 new)	350 (58 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	10	10	125	30	Represents number served per quarter, not cumulative.
21. 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 2017-18 Application for Funding
One-Year Work Program
OEO Form 212 (continued)**

Section II: One-Year CSBG Program Objective and Activities (continued)						
Activities	Position Title(s)	Implementation Schedule				
		First Quarter	Second Quarter	Third Quarter	Fourth Quarter	
22. ESR's CSBG funded staff work collaboratively with the Housing Authority of Winston-Salem to help HAWS reach their requirement for funding and to provide self-sufficiency services to HAWS residents. ESR staff attends HAWS meetings regularly to remain abreast of the barriers to self-sufficiency HAWS residents experience.	Agency Ops SSFA Manager IDA Program Manager Outreach Coordinator Success Coach Reception Orientation	3 hours (1 hour meeting each month)	6 hours (1 hour meeting each month))	9 hours (1 hour meeting each month)	12 hours (1 hour meeting each month)	
23. 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)	
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)	

**Community Services Block Grant Program
Fiscal Year 2017-18 Application for Funding
One-Year Work Program
OEO Form 212 (continued)**

Section II: One-Year CSBG Program Objective and Activities (continued)						
Activities	Position Title(s)	Implementation Schedule				
		First Quarter	Second Quarter	Third Quarter	Fourth Quarter	
26. ESR collaborates with Financial Pathways of the Piedmont (FPP) to assist with credit repair to help clients build assets. New clients attend ESR financial literacy classes to learn about budgeting, behavior/money, savings/ investments, and credit/debt. Having attended the financial literacy class they attend a credit counseling session with FPP to increase knowledge, including monitoring credit, resolving credit disputes, and implementing a plan to reduce debt /improve credit scores over time.	Agency Ops SSFA Manager Outreach Coordinator Success Coach	25 (25 new)	50 (25 new)	75 (25 new)	100 (25 new)	
27. 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	35 (35 New)	70 (35 New)	105 (35 New)	140 (35 New)	
28. 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 2017-18 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 2017-18 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.

Table 1 Outcome Measures for Project 1 (enter project name)	
Measure	Expected to Achieve the Outcome in Reporting Period (Target)
The number of participant families served.	350
The number of low-income participant families rising above the poverty level.	104
The number of participant families obtaining employment.	10
The number of participant families who are employed and obtain better employment.	88
The number of jobs with medical benefits obtained.	88
The number of participant families completing education/training programs.	53
The number of participant families securing standard housing.	18
The number of participant families provided emergency assistance.	88
The number of participant families provided employment supports.	53
The number of participant families provided educational supports.	35
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 2017-18 Application for Funding
One-Year Work Program
OEO Form 212 (continued)**

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

**Community Services Block Grant Program
 Fiscal Year 2017-18 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											
Agency Name:											
Project Name:											
County											Total
Total Planned											
Project Name:											
County											Total
Total Planned											

**Community Services Block Grant Program
Fiscal Year 2017-18 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.

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.

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

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 and has entered implementation phases. 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 time 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 2017-18 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.)		
Indirect Costs		
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:		\$
Cost Allocation		
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	

<u>Appendices:</u>		
• Organizational Chart (do not include names)	Separate document	✓
• Job Description and Resume for the Agency's Executive Director	Follows this Page	✓
• Job Description and Resume for the Agency's Chief Financial Officer	Follows this Page	✓
• Job Descriptions for all CSBG employees (do not include names)	Separate document	✓
• Affirmative Action Plan	Separate documents	✓
• Documentation of Public Hearings for Initial Planning Process:	Separate documents (.pdf)	
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:	Separate document (.pdf)	
Copy of advertisement(s)		✓
• Documentation of Submission to County Commissioners:	Separate documents (.pdf)	
Certified document from county clerk		
Commissioners' comments or minutes (if applicable)		
• Cognizant-Approved Indirect Cost Agreement	CPA Certified	
• Copy of the Proposal Application submitted to the cognizant agency for approval of the Indirect Cost Rate	CPA Certified	
• Cost Allocation Plan (if applicable)		
• Contracts/Leases	Separate documents	
• Vehicle Registrations	NA	



Experiment in Self-Reliance, Inc.
Position Description—Executive Director

Primary Role:

The Executive Director is responsible for the administration of Experiment in Self-Reliance, including operations of all programs undertaken by the agency. The Executive Director is responsible for all decisions regarding the agency budget, personnel, program operations, appropriate staff support, facility maintenance, community contacts with agencies and funding sources, assure the execution of NC ROMA principles throughout the organization, and all other decisions that reflect on the successful operation of the agency upon appropriate consultation and direction of the Board of Directors. Additionally, this individual is responsible for administering the policies and procedures established by the Board of Directors in the everyday operation of the agency:

- Ensures that management tools are developed and implemented for transition plan to replace 2 leadership positions: these tools include a development plan for updated strategic plan, annual action plans, and human resources plan (based on funding availability).
- Completion of Capital Campaign focus inclusive of soliciting and collections of campaign pledges. Securing property, aiding in executing and design for bidding process in the new proposed building construction, building loan, developing a relocation plan moving agency operations have all been completed.
- Grant writing for City, County, CSBG, CDBG, ESGP, United Way, and HUD related funding sources. Fundraising (non-profit specific). Oversees fundraising planning and implementation, including identifying resource requirements, researching funding sources, establishing strategies to approach funders, submitting proposals and administrating fundraising records and documentation. Tracking reporting processes for all major funding sources.

Reports to: Board of Directors

Duties:

Organizational Effectiveness

- Hires, assigns, evaluates, sets salaries, and termination employees—all subject to review of the Board of Director’s Human Resources Committee.
- Undertakes other duties and responsibilities as the Board of Directors may from time to time request.
- Performs other duties as requested by management.

Organizational Program Leadership

- Responsible for designing, developing, and providing capacity building services to low-income individuals/families in need.
- Focus on creating and maintaining a structure that engenders self-sufficiency in people.
- Serves at the pleasure of the Board of Directors and retains responsibility for agency planning, and priority setting, fiscal management and budget control, fundraising and grant seeking, liaison with government, services implementation, personnel management and community outreach.
- Delegate day-to-day supervisory authority to appropriate senior staff in the agency, as may be necessary for effective administration while ensuring that the agency is meeting its goals in an effective and efficient manner.

Risk Management

- Maintains appropriate working environment for employees and clients.

Ambassadorship

- Serves as a team player and assists in furthering the mission of the organization.
- Serves as an ambassador for the Experiment in Self-Reliance and respects the integrity of the organization.

Reasoning Ability

- Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists.
- Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

Physical Demands

- The physical demands described are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- While performing the duties of this job, the employee is regularly required to walk, stand, crawl, bend, stoop, climb, use hands to finger, handle, or feel; and reach with hands and arms. The employee frequently may be required to sit and talk. The employee may occasionally lift and/or move up to 40 pounds. Specific vision abilities required by this job includes close vision, distance vision, peripheral vision, and depth perception.

Work Environment

- The work environment characteristics described are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- While performing the duties of this job, the employee is rarely exposed to outside weather conditions. The noise level in the work environment is usually low to moderate.

Specification

- The information presented indicates the general nature and level of work expected of employees in this classification. It is not designed to contain, or to be interpreted as, a comprehensive inventory of all duties, responsibilities, qualifications, and objectives required of employees assigned to this job.

Licenses, Registrations, Certifications

- Valid Driver's License and reliable transportation that may be used in the performance of duties.

Qualifications:

- Minimum qualification for this position include Bachelor of Science (BS) in Social Work or a related field (a master's degree preferred) and a minimum of five years' experience of successfully proven administrative leadership of an agency or social service organization.
- Superior written and verbal communication skills.
- In-depth knowledge of and experience working with disadvantaged, underprivileged populations

Twana Wellman-Roebuck

(336) 722-9400, Ext. 137

PROFILE

Demonstrated personal commitment to organizational development and strengthening Adult leadership

- Fifteen years of management experience
- Strong oral and written communication skills
- Twelve years of fundraising expertise
- Team building approach to leadership
- Persuasive negotiating skills
- Excellent facilitation and training skills
- Exceptional volunteer recruiter
- Proven organization skills

Motivational and Inspirational Speaker

Federal, State, National and Local Grant writing skills
Budget Proposal development skills

WORK EXPERIENCE and ACHIEVEMENTS

Experiment in Self-Reliance; Winston-Salem, North Carolina (1998-Present)

Executive Director

Responsible for the administration of the agency including operation of all programs undertaken by the agency. Makes all decisions regarding the agency budget, personnel, program operations, appropriate support staff, facility maintenance, community contacts with agencies and funding sources and all other decisions that reflect on the successful operations of the agency upon appropriate consultation and direction of the Board of Directors. Also administers the policies and procedures established by the Board of Directors in the everyday operation of the agency.

Achievements:

United Way of Forsyth County; Winston-Salem, North Carolina (1997-1998)

Director, Training & Development

Successfully developed and implemented training strategies for Corporate Employee Campaigns, Managed Volunteer Loaned Executives, and Company Account Solicitors. Established measurable goals for evaluation of programs. Result: significantly increased the number of employee based campaigns and assisted in raising over \$13 million; 12.4% increase.

Achievements:

- Initiated community's first Day of Caring, mobilized nearly 700 volunteers; more than 1,400 year two.
- Led targeted focus groups with county, city, education and health care professionals to organizationally re-design procedures and methods of fundraising within their system.
- Developed and implemented training plan to support campaign message strategy.
- Conducted campaign solicitation training for RJ Reynolds, Wachovia, Integon, and Wake Forest University Baptist Hospital.
- Organized and executed a campaign seminar for 150 corporate employees.

United Way of Forsyth County; Winston-Salem, North Carolina (1990-1997)

Director, Volunteer Center

Effectively utilize strong organizational skills, volunteer recruitment, interpersonal and communication skills, manage internal operations and budget for the Volunteer Center. Recruited, hired, trained and managed departmental staff. Result: substantially raised awareness of volunteerism, locally, state-wide and nationally; while developing procedures and techniques for non-profits to recruit, train, and retain, volunteers.

Achievements:

- Developed and managed Volunteer Center budget
- Established relationships with key constituencies in the community as the representative of the United Way's Volunteer Center
- Recruited 300 plus volunteers for community non-profit organizations
- Conceptualized and implemented training sessions for Volunteer Coordinators
- Conducted community wide media recognition campaign for 15,000 volunteers throughout out county
- Conducted and organized volunteer recruitment fairs at Wake Forest University, Forsyth Technical College, Novant Health Triad Region (Forsyth Hospital), and Wake Forest University Baptist Hospital
- Responsible for instituting the first Corporate Volunteer Program for 680 employees in 7 major corporations
- Organized year-round marketing and relationship building programs in 21 companies
- Initiated progressive training program for Non-Profit Board Management
- Established Project Blueprint community's first minority leadership program
- Generated grant funding from the Kellogg Foundation to provide programmatic support of Project Blueprint
- Instrumental in securing grant funding from the Winston-Salem Foundation to start an innovative training collaborative with the Duke University Non-Profit Management Program
- Host community's first volunteer talk show during drive time on radio station WSNC (90.5 FM)

United Way of Forsyth County; Winston-Salem, North Carolina (1984-1990)

Manager, Campaign Division

Managed volunteers and effectively raised money in major organizations. Result: implemented a systemic approach to fundraising of non-traditional donors.

Achievements:

- Successfully recruited, trained, managed and motivated new campaign volunteer team of 10. Result: raised over \$50,000 in mail solicitation drives for retirees and raised \$10,000 new dollars in a one-time telephone blitz campaign for retirees
- Raised \$100,000 in middle size companies totaling 100 to 500 employees
- Developed and implemented campaign strategies for 4,000 employees at CMI (Now Novant Health Triad Region); raising \$366,000 including solicitation in 3 neighboring counties
- Designed solicitation techniques for health care campaign solicitors
- Coordinated fundraising plan for Wachovia raising \$350,000 in employee dollars and \$170,000 in corporate dollars

Other Career Experiences; Winston-Salem, North Carolina (1979-1984)

Pre-school Teacher-Centenary Methodist Church

Assistant Manager-Eckerd Drugs

Ad Sales Representative-Winston-Salem Chronicle

Assistant Community Service Director-Bethlehem Community Center

PROFESSIONAL DEVELOPMENT

- 1993 Oral Presentation Training; James A. Fyock and Associates
- Class of 1994 Leadership Connections
- Class of 1995 Leadership Winston-Salem
- 1996 Dale Carnegie Sales Training

- 1990-1997 Member and Former President of NC/SC Volunteer Center Directors Association
- 1995-1996 Representative for The National Points of Light Foundation Volunteer Center Council in Washington, D.C.
- 1995-1996 Member and Former Marketing Chairman of N. C. Volunteer Administrators Association
- 1995-1996 Member and Former Program Chairman of Piedmont Regional Association of Volunteer Administrators
- 1997-Present Member of American Society for Training and Development

EDUCATION

Winston-Salem State University, Winston-Salem, North Carolina

B.S. Elementary Education, Art Minor, 1979

Additional coursework:

- Fundraising and Organizational Development I
- Managing Employees and Volunteers Effectively II
- Strategic Management III from United Way of America
- Managing Employees in a Diverse Workplace
- Quality Management Techniques and Tips

COMPUTER SKILLS

Microsoft Office: (Word, Excel, Power Point) Fundraising Data Base Program FoxPro Internet (World Wide Applications)

VOLUNTEER AND COMMUNITY INVOLVEMENT

- 1996 Leadership Connection Chairperson
- 1996 Leadership Winston-Salem Board Member
- 1997 Chairperson, Winston-Salem Downtown Church Center Board of Directors
- 1997-/98 Minority Women Business Enterprise Advisory Board
- 1997/98 By-Laws Committee Arts Council
- 1998 YWCA Awards Program Chairperson
- Member Jr. League Member & Alpha Kappa Alpha Sorority



Experiment in Self-Reliance
Position Description--- Senior Finance Director

Primary Role:

The Senior Finance Director will be responsible for all financial affairs of the agency subject to review and supervision by the Executive Director, including tracking and overseeing receipt of funds, paying all bills, managing the payroll, purchasing of supplies, and assuring that all outstanding contracts are satisfied and conducive to NC ROMA principles.

Reports to: Executive Director

Duties:

Organizational Effectiveness

- Assures that the bookkeeping methods and practices are keeping with requirements of the funding sources and the Experiment in Self-Reliance.
- Applies principles of accounting to install and maintain operation of general system.
- Prepares financial reports and insures submission at required due dates.
- Assists in the preparation of budgets annually of all grants.
- Prepares and files federal and state tax returns and other regular and special tax reports to governmental agencies (Form 990).
- Assists the Executive Director in the development and preparation of budgets and general accounting procedures.
- Provides consolidated financial reports for presentation to the Board of Directors, and/or as requested by the Executive Director.
- Attends Board of Directors and Finance Committee meetings.

Risk Management

- Maintains the purchasing system within the agency in ordering office supplies and equipment and other items purchased—also maintains the stockroom for supplies requisitioned.

Ambassadorship

- Serves as an ambassador for the Experiment in Self-Reliance and respects the integrity of the organization.
- Serves as a team player and assists in furthering the mission of the organization.
- Performs other job-related duties as required by the Executive Director.

Reasoning Ability

- Ability to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists.
- Ability to interpret a variety of instructions furnished in written, oral, diagram, or schedule form.

Physical Demands

- The physical demands described are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- While performing the duties of this job, the employee is regularly required to walk, stand, crawl, bend, stoop, climb, use hands to finger, handle, or feel; and reach with hands and arms. The employee

frequently may be required to sit and talk. The employee may occasionally lift and/or move up to 40 pounds. Specific vision abilities required by this job includes close vision, distance vision, peripheral vision, and depth perception.

Work Environment

- The work environment characteristics described are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- While performing the duties of this job, the employee is rarely exposed to outside weather conditions. The noise level in the work environment is usually low to moderate.

Specification

- The information presented indicates the general nature and level of work expected of employees in this classification. It is not designed to contain, or to be interpreted as, a comprehensive inventory of all duties, responsibilities, qualifications, and objectives required of employees assigned to this job.

Licenses, Registrations, Certifications

- Valid Driver's License and reliable transportation that may be used in the performance of duties.

Qualifications:

- Must possess a 4-year college degree in Accounting and three years' experience.
- No history of bad debts or criminal convictions, and must be bondable.
- Individual must be computer literate and have working knowledge of computer data-entry processes, Microsoft programs, and other related software programs.

DEBRA NEWSOME PERKINS

Pfafftown, North Carolina 27040

(336)722-9400 ext. 138

EDUCATION

University of South Carolina; Columbia, SC
University of North Carolina-Greensboro; BS
Major: Business Administration/Economics
Forsyth Technical Community College; Winston-Salem, NC Accounting

WORK EXPERIENCE

Experiment In Self-Reliance, Inc.
1550 University Court, P.O. Box 135
Winston-Salem, NC 27102-0135

February, 2011- Present

Senior Finance Director: Responsible for all financial affairs of the agency; Acts as Executive Director in the absence of the director in concert with the public communications and agency operations functions of the agency; Manages controllership duties of all financial operations such as presenting and reporting accurate and timely financial information of the agency; Works in concert with ED and Board Finance Committee in deciding how and when to invest agency funds oversees the capital structure of the agency determining the best mix of debt, equity and internal financing; Aids in developing economic strategy and forecasting trying to predict the best way to ensure the agency's success in the future; Tracks and oversees the receipt of funds, accounts payables, payroll, purchasing and assures that all outstanding contracts are satisfied

February, 2001 – January, 2011

Finance Director: Responsible for all financial affairs of the agency, tracking and overseeing receipt of funds, bill payment, payroll management, purchasing, monitoring contracts, prepares budgets and revisions, posts to general ledger (Passport Business Solutions), maintains departmental files, prepares reimbursement invoices, responsible for employee benefits, records receipts and prepares deposits, supervises Technical Support Associate, convenes agency Finance Committee, prepares monthly financial statements for the Board of Directors

October, 1977 – February, 2001

Accountant: Ensures the use of proper accounting procedures as recommended by the auditors, prepares budgets and revisions, monitors approved budgets, bank reconciliations, federal and state quarterly and annual tax reports, accounts payable, posts to ledger (Real World Accounting Software), maintains departmental files, prepares statements for reimbursement, prepares payroll and deductions for employees, handles employee benefits (insurances) with enrollment and disenrollment, maintains records of receipts and prepares deposits, assists with annual audit, financial report preparation.

OTHER

Leadership Winston-Salem Class of 2012
Cooperative Extension Advisory Board 2010-2011
Certificate in Grants Management – NC Office of the State Auditor June, 2009

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, 2017 - June 30, 2018

SECTION II. CONTRACT SUMMARY

CSBG	Total Direct Costs	Total Indirect Costs	Admin. Support (CSBG Only)	Total Contract Amount
	\$926,090	\$183,552		\$1,109,642
TOTAL OEO CONTRACT AMOUNT				\$1,109,642

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	PROGRAM TOTALS	COUNTY TOTALS
Salaries & Wages	\$372,816	\$372,816	\$372,816
Fringe Benefits	\$127,865	\$127,865	\$127,865
Equipment	\$3,700	\$3,700	\$3,700
Communication	\$7,307	\$7,307	\$7,307
Space Cost	\$18,840	\$18,840	\$18,840
Travel	\$24,800	\$24,800	\$24,800
Supplies/Materials	\$5,760	\$5,760	\$5,760
Contractual	\$20,294	\$20,294	\$20,294
Client Services	\$340,423	\$340,423	\$340,423
Other	\$4,285	\$4,285	\$4,285
Total Direct Costs	\$926,090	\$926,090	\$926,090
Indirect Costs			
Approved Rate: 19.82%	\$183,552	\$183,552	
Base: Total Direct Costs			
TOTALS	\$1,109,642	\$1,109,642	\$926,090

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	\$12,343	23.00%	FICA	\$12,343	X 7.6500	%	= \$ 944	100.00%	\$944	\$12,343
					UIB	\$5,313	X 0.8400	%	= \$ 45	100.00%	\$45	
					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	\$12,343	X 6.0000	%	= \$ 741	100.00%	\$741	
					Workers Comp	\$12,343	X 0.3500	%	= \$ 43	100.00%	\$43	
Self-Sufficiency & Family Advocate Service Manager	\$45,407	12	\$45,407	100.00%	Disability	\$5	X 12.0000	Month	= \$ 60	100.00%	\$60	
					FICA	\$45,407	X 7.6500	%	= \$ 3,474	100.00%	\$3,474	\$45,407
					UIB	\$23,100	X 0.8400	%	= \$ 194	100.00%	\$194	
					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	
Receptionist/Resource & Referral Agent	\$25,641	12	\$19,231	75.00%	Workers Comp	\$45,407	X 0.3500	%	= \$ 159	100.00%	\$159	
					Disability	\$23	X 12.0000	Month	= \$ 276	100.00%	\$276	
					FICA	\$19,231	X 7.6500	%	= \$ 1,471	100.00%	\$1,471	\$19,231
					UIB	\$17,325	X 0.8400	%	= \$ 146	100.00%	\$146	
					Health Ins	\$327	X 12.0000	Month	= \$ 3,924	100.00%	\$3,924	
					Life Ins	\$10	X 12.0000	Month	= \$ 120	100.00%	\$120	
Outreach Service Coordinator	\$37,391	12	\$37,391	100.00%	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	
					FICA	\$37,391	X 7.6500	%	= \$ 2,860	100.00%	\$2,860	\$37,391
					UIB	\$23,100	X 0.8400	%	= \$ 194	100.00%	\$194	
					Health Ins	\$436	X 12.0000	Month	= \$ 5,232	100.00%	\$5,232	
Outreach Service Coordinator	\$36,852	12	\$36,852	100.00%	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	
					FICA	\$36,852	X 7.6500	%	= \$ 2,819	100.00%	\$2,819	\$36,852
					UIB	\$23,100	X 0.8400	%	= \$ 194	100.00%	\$194	
TOTAL FRINGES			\$45,361		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 SALARIES			\$151,224									151,224
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	Self Sufficiency		
									Fringes	%	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	\$17,325	X 0.8400	%	= \$ 146	100%	\$146	
					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	
Administrative Asst. & Data Analyst	\$37,591	12	\$17,292	46.00%	Disability	\$10	X 12.0000	Month	= \$ 120	100%	\$120	
					FICA	\$17,292	X 7.6500	%	= \$ 1,323	100%	\$1,323	\$17,292
					UIB	\$10,626	X 0.8400	%	= \$ 89	100%	\$89	
					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	
Success Coach	\$33,678	12	\$33,678	100.00%	Workers Comp	\$17,292	X 0.3500	%	= \$ 61	100%	\$61	
					Disability	\$9	X 12.0000	Month	= \$ 108	100%	\$108	
					FICA	\$33,678	X 7.6500	%	= \$ 2,576	100%	\$2,576	\$33,678
					UIB	\$23,100	X 0.8400	%	= \$ 194	100%	\$194	
					Health Ins	\$436	X 12.0000	Month	= \$ 5,232	100%	\$5,232	
					Life Ins	\$11	X 12.0000	Month	= \$ 132	100%	\$132	
Success Coach	\$29,870	12	\$29,870	100.00%	Retirement	\$33,678	X 6.0000	%	= \$ 2,021	100%	\$2,021	
					Workers Comp	\$33,678	X 0.3500	%	= \$ 118	100%	\$118	
					FICA	\$29,870	X 7.6500	%	= \$ 2,285	100%	\$2,285	\$29,870
					UIB	\$23,100	X 0.8400	%	= \$ 194	100%	\$194	
					Health Ins	\$436	X 12.0000	Month	= \$ 5,232	100%	\$5,232	
					Life Ins	\$9	X 12.0000	Month	= \$ 108	100%	\$108	
Success Coach	\$32,445	12	\$32,445	100.00%	Retirement	\$29,870	X 6.0000	%	= \$ 1,792	100%	\$1,792	
					Workers Comp	\$29,870	X 0.3500	%	= \$ 105	100%	\$105	
					FICA	\$32,445	X 7.6500	%	= \$ 2,482	100%	\$2,482	\$32,445
					UIB	\$23,100	X 0.8400	%	= \$ 194	100%	\$194	
					Health Ins	\$872	X 12.0000	Month	= \$ 10,464	100%	\$10,464	
					Life Ins	\$10	X 12.0000	Month	= \$ 120	100%	\$120	
					Retirement	\$32,445	X 6.0000	%	= \$ 1,947	100%	\$1,947	
					Workers Comp	\$32,445	X 0.3500	%	= \$ 114	100%	\$114	
					Disability	\$13	X 12.0000	Month	= \$ 156	100%	\$156	
TOTAL FRINGES			\$48,530					\$48,530		\$48,530		
TOTAL SALARIES			\$136,892								\$136,892	
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	\$9,240	X 0.8400	%	= \$ 78	100%	\$78	
					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	\$9,240	X 0.8400	%	= \$ 78	100%	\$78	
					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	
Success Coach new hire 7-1-17	\$31,500	12	\$31,500	100.00%	FICA	\$31,500	X 7.6500	%	= \$ 2,410	100%	\$2,410	\$31,500
					UIB	\$23,100	X 0.8400	%	= \$ 194	100%	\$194	
					Health Ins	\$872	X 9.0000	Month	= \$ 7,848	100%	\$7,848	
					Life Ins	\$10	X 9.0000	Month	= \$ 90	100%	\$90	
					Retirement	\$23,625	X 6.0000	%	= \$ 1,418	100%	\$1,418	
					Workers Comp	\$31,500	X 0.3500	%	= \$ 110	100%	\$110	
					Disability	\$13	X 9.0000	Month	= \$ 117	100%	\$117	
Finance and Compliance Assoc.	\$35,000	12	\$17,500	50.00%	FICA	\$17,500	X 7.6500	%	= \$ 1,339	100%	\$1,339	\$17,500
					UIB	\$11,550	X 0.8400	%	= \$ 97	100%	\$97	
					Health Ins	\$436	X 12.0000	Month	= \$ 5,232	100%	\$5,232	
					Life Ins	\$6	X 12.0000	Month	= \$ 72	100%	\$72	
					Retirement	\$17,500	X 6.0000	%	= \$ 1,050	100%	\$1,050	
					Workers Comp	\$17,500	X 0.3500	%	= \$ 61	100%	\$61	
					Disability	\$10	X 12.0000	Month	= \$ 120	100%	\$120	
TOTAL FRINGES			\$33,975						\$33,975		\$33,975	
TOTAL SALARIES			\$84,700									\$84,700
TOTAL FTE's												

EXPERIMENT IN SELF-RELIANCE, INC.

SECTION IVa. - BUDGET SUPPORT DATA

COST CATEGORY				Self Sufficiency	TOTAL
EQUIPMENT					
Description	Quantity	Unit Price			
Computer work stations (new positions)	2	\$850	\$1,700	\$1,700	\$1,700
Laptops	2	\$1,000	\$2,000	\$2,000	\$2,000
TOTAL EQUIPMENT				\$3,700	\$3,700
COMMUNICATIONS					
Postage 125 pieces avg./month .465 x 12 mos.				\$698	\$698
\$52.45 avg. /mo. X 10.5 extensions = 550.72 x 12 mos.				\$6,609	\$6,609
TOTAL COMMUNICATIONS				\$7,307	\$7,307

SECTION IVb - BUDGET SUPPORT DATA

COST CATEGORY		Self Sufficiency		TOTAL
SPACE COST				
3480 Dominion Street depreciation \$9,071 mo. X 12 mos. X 14.46%		\$15,740		\$15,740
water/sewer \$256 mo. X 12 mos. X 14.46%		\$444		\$444
electricity \$1,128 mo. X 12 mos. X 14.46%		\$1,957		\$1,957
trash collection \$77 mo. X 12 mos. X 14.46%		\$134		\$134
pest control \$85 mo. X 12 mos. X 14.46%		\$147		\$147
Fire and security monitoring \$19 mo. X 12 mos. X 14.46%		\$33		\$33
HVAC maintenance \$143 mo. X 12 mos. X 14.46%		\$248		\$248
Fire inspection \$79 mo. X 12 mos. X 14.46%		\$137		\$137
TOTAL SPACE COSTS		\$18,840		\$18,840
TRAVEL				
Lodging avg. \$106 per day x 4 days x 9 staff NCCAA Conference		\$3,816		\$3,816
Conference Registration \$375 x 9 staff NCCAA Conference		\$3,375		\$3,375
Lodging avg. \$106 per day x 4 days x 5 staff OEO Contractor's Training		\$1,590		\$1,590
Meals avg. \$37.90 per day x 4 days x 9 staff (one meal included in registr.)		\$1,266		\$1,266
meals avg. \$37.90 per day x 1 day x 5 staff OEO contractor's training (meals included)		\$189		\$189
Mileage 1100 miles average x 6 staff x .54		\$3,564		\$3,564
CSBG Staff Planned Training		\$10,000		\$10,000
Board Member Planned Training		\$1,000		\$1,000
TOTAL TRAVEL		\$24,800		\$24,800
SUPPLIES/MATERIALS				
Office & computer supplies (pens, paper, folders, clips, pads, calendars, planners, etc.)		\$4,800		\$4,800
\$400 mo. Avg. x 12 mos				
Janitorial supplies (paper towels, tissue, etc.) \$80 mo. Avg. x 12 mos.		\$960		\$960
TOTAL SUPPLIES/MATERIALS		\$5,760		\$5,760

SECTION IVc. - BUDGET SUPPORT DATA

COST CATEGORY		Self Sufficiency		TOTAL
CONTRACTUAL				
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 \$390.70 mo. X 12 mos. X 43%		\$2,016		\$2,016
Cleaning Service for 3480 Dominion Street (D&K Fresh Start Janitorial Serv.)				
\$1,500 mo. X 12 mos. X 14.46%		\$2,603		\$2,603
Equifax verification services (Income & Employment)				
The Work Number $\$3.75 + \$9.95 = \$13.70 \times 150$ clients (estimated)		\$2,055		\$2,055
		\$20,294		\$20,294

EXPERIMENT IN SELF-RELIANCE, INC.

SECTION IVd. - BUDGET SUPPORT DATA

COST CATEGORY		Self Sufficiency		TOTAL
CLIENT SERVICES				
Credit and Debt Management Assistance (Housing, Utilities, Medical) 10 clients @ \$2500		\$25,000		\$25,000
Financial Literacy Training classes \$600 per class x 18 classes		\$10,800		\$10,800
Rent \$600 mo. Avg. x 125 clients		\$75,000		\$75,000
Utilities \$350 mo. Avg. x 125 clients		\$43,750		\$43,750
Transportation (car repairs, insurance, etc.) \$800 avg. x 15 clients		\$12,000		\$12,000
Truck Driver Training \$2,785 x 10 clients		\$27,850		\$27,850
Tuition/Fees (WSSU, FTCC, Mt. Eagle, etc.) \$1,500 x 40		\$60,000		\$60,000
Testing Fees for Licenses (RN, etc.) \$275 avg. x 20 clients		\$5,500		\$5,500
Textbooks, class supplies \$700 avg. x 40 clients		\$28,000		\$28,000
Work related supplies (shoes, uniforms, tools, etc.) \$228 avg. x 10 clients		\$2,283		\$2,283
Childcare \$350 avg. x 10 clients x 3 mos.		\$10,500		\$10,500
Financial Pathways of the Piedmont Credit Counseling Sessions (one-on-one) \$160 x 14		\$2,240		\$2,240
School Supplies/clothing 300 children x \$125		\$37,500		\$37,500
TOTAL CLIENT SERVICES		\$340,423		\$340,423
OTHER (specify)				
Property and general liability insurance 3480 Dominion Street				
\$938 month x 12 mos. X 14.46%		\$1,627		\$1,627
NCCAA Agency membership \$221.50 mo. X 12 mos.		\$2,658		\$2,658
TOTAL OTHER		\$4,285		\$4,285

TOTAL AGENCY BUDGET

FISCAL YEAR July 1, 2017 - June 30, 2018

AGENCY EXPERIMENT IN SELF-RELIANCE, INC.

Please check one

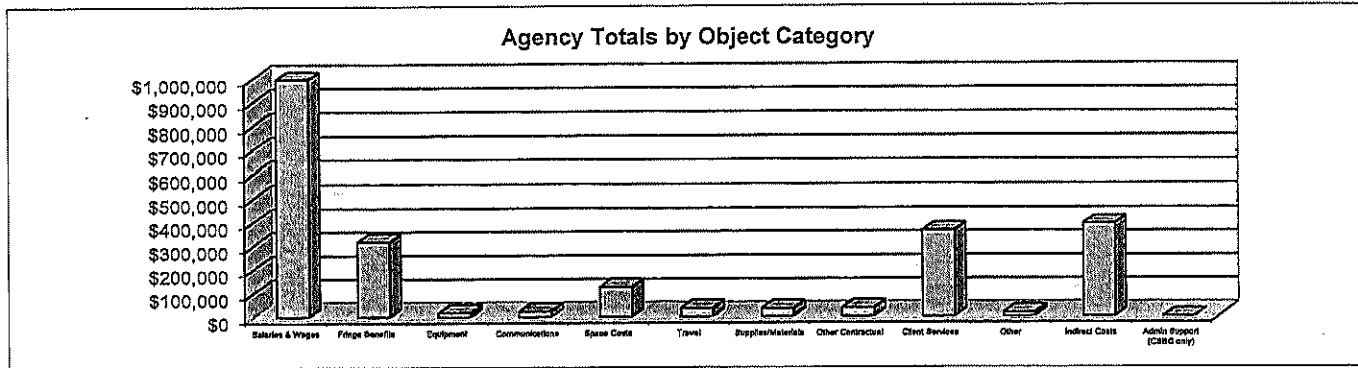
INDIRECT COST BASE:	<input checked="" type="checkbox"/> Total Direct Costs	<input type="checkbox"/> Salaries/Wages	<input type="checkbox"/> Salaries/Fringes
INDIRECT COST RATE:	19.8%		

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	\$372,816	\$75,882	\$8,393	\$29,874	\$283,135	\$47,000	\$84,266	\$95,146			\$996,512
Fringe Benefits	\$127,865	\$20,080	\$805	\$2,865	\$102,080	\$21,400	\$29,161	\$13,090			\$317,346
Equipment	\$3,700		\$800	\$1,500	\$12,000						\$18,000
Communication	\$7,307	\$436	\$100	\$1,000	\$8,500	\$1,600	\$2,400	\$2,900			\$24,243
Space Cost	\$18,840	\$1,000			\$58,002	\$2,000	\$1,423	\$3,014	\$42,793		\$127,072
Travel	\$24,800	\$500	\$1,363	\$500	\$6,000	\$1,200	\$1,250	\$1,000			\$36,613
Supplies/Materials	\$5,760	\$500	\$1,000	\$8,795	\$7,500	\$750	\$5,000	\$4,000	\$1,165		\$34,470
Contractual	\$20,294				\$11,000		\$4,500		\$1,500		\$37,294
Client Services	\$340,423	\$2,000	\$1,605		\$5,000	\$3,500	\$10,000				\$362,528
Other	\$4,285		\$2,000	\$500	\$2,500	\$1,300	\$2,000	\$2,750	\$1,000		\$16,335
Total Direct Costs	\$926,090	\$100,398	\$16,066	\$45,034	\$495,717	\$78,750	\$140,000	\$121,900	\$46,458		\$1,970,413
Indirect Costs	\$183,552	\$19,899	\$3,184	\$8,926	\$98,251	\$15,608	\$27,748	\$24,161	\$9,254		\$390,583
Admin Support (CSBG only)											
Total Costs	\$1,109,642	\$120,297	\$19,250	\$53,960	\$593,968	\$94,358	\$167,748	\$146,061	\$55,712		\$2,360,996

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											
Total Direct Costs											
Indirect Costs											
Total Costs											

TOTALS BY OBJECT CATEGORY

OBJECT CATEGORY	TOTALS
Salaries & Wages	\$996,512
Fringe Benefits	\$317,346
Equipment	\$18,000
Communications	\$24,243
Space Costs	\$127,072
Travel	\$36,613
Supplies/Materials	\$34,470
Other Contractual	\$37,294
Client Services	\$362,528
Other	\$16,335
Total Direct Costs	\$1,970,413
Indirect Costs	\$390,583
Admin Support (CSBG only)	
Agency Totals	\$2,360,996



OEO/TAB
 Revised: 2/12/2016

COUNTY BUDGET

FISCAL YEAR

July 1, 2017 - June 30, 2018

AGENCY EXPERIMENT IN SELF-RELIANCE, INC.

	COUNTY NAME(S)									TOTAL
	FORSYTH	(County)	(County)	(County)	(County)	(County)	(County)	(County)	(County)	
Per County Allocation	\$1,109,642									
Expense Categories										
Salaries & Wages	\$372,816									\$372,816
Fringe Benefits	\$127,865									\$127,865
Equipment	\$3,700									\$3,700
Communication	\$7,307									\$7,307
Space Costs	\$18,840									\$18,840
Travel	\$24,800									\$24,800
Supplies/Materials	\$5,760									\$5,760
Contractual	\$20,294									\$20,294
Client Services	\$340,423									\$340,423
Other	\$4,285									\$4,285
Total Direct Costs	\$926,090									\$926,090
Indirect Costs	\$183,552									\$183,552
Admin Support (CSBG only)										
Total Costs	\$1,109,642									\$1,109,642



**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.

Agency Name: Experiment In Self-Reliance, Inc. (ESR)

County: Forsyth

Date of Application Submission: December 16, 2016

[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 13, 2017**.

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