

FORSYTH COUNTY

BOARD OF COMMISSIONERS

MEETING DATE: JANUARY 25, 2016

AGENDA ITEM NUMBER: 8

SUBJECT: RESOLUTION ACKNOWLEDGING RECEIPT AND REVIEW OF THE 2016-2017 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: Recommend Approval

SUMMARY OF INFORMATION:

See attached

ATTACHMENTS: YES NO

SIGNATURE: *J. Kimberly Watts, Jr.*

COUNTY MANAGER

DATE: January 20, 2016

**RESOLUTION ACKNOWLEDGING RECEIPT AND REVIEW OF
THE 2016-2017 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 2016-2017 Community Services Block Grant Application in the amount of \$894,673 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, 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 2016-2017 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 2016-2017 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 206 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 25th day of January 2016.

North Carolina Department of Health and Human Services

Division of Social Services



Community Services Block Grant Program

Fiscal Year 2016-17 Application for Funding
Project Period July 1, 2016 – June 30, 2017
Application Due Date: February 12, 2016

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):	12-09-2015 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, 2016 – June 30, 2017

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

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

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

Item	Included (√)
Signed Application Certification (blue ink only)	√
Signed Board Membership Roster (blue ink only)	√
Board of Directors Officers and Committees	√
Planning Process Narrative	√
Form 210 – Agency Strategy for Eliminating Poverty	√
Form 212 – One-Year Work Program	√
Monitoring, Assessment and Evaluation Plan	√
Form 212A – CSBG Administrative Support Worksheet (if applicable)	√
Form 225 – Agency Budget Information	√
Form 225N-Budget Narrative	√
<u>Appendices (to be attached by the Applicant):</u>	
• Organizational Chart (do not include names)	√
• Job Description and Resume for the Agency's Executive Director	√
• Job Description and Resume for the Agency's Chief Financial Officer	√
• Job Descriptions for all CSBG employees (do not include names)	√
• Affirmative Action Plan	√
• Documentation of Public Hearings for Initial Planning Process:	
Copy of Public Notice(s) from Newspaper(s)	√
Agenda of Public Meeting(s)	√
Copy of Attendance Sheet(s)	√
Minutes of Public Meeting(s)	√
• Documentation for Notice of Intent to Apply:	√
Copy of advertisement(s)	√
• Documentation of Submission to County Commissioners:	√
Certified document from county clerk	√
Commissioners' comments or minutes (if applicable)	√
• Cognizant-Approved Indirect Cost Agreement	
• Copy of the Proposal Application submitted to the cognizant agency for approval of the Indirect Cost Rate	
• Cost Allocation Plan (if applicable)	
• Contracts/Leases	
• Vehicle Registrations	N/A

**Community Services Block Grant Program
Fiscal Year 2016-17 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 January 7, 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: November 18, 2015

Board Chairperson: *Jerry L. Romans* (Signature) 12/9/15 (Date)

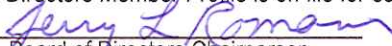
Finance Committee Chairperson: *Rebecca Bender* (Signature) 12/9/15 (Date)

Board of Directors' Membership Roster

Total Seats Per Agency Bylaws	21			Total Current Vacant Seats	2	
Total Number of Seats Reserved for Each Sector	Poor	7	Public	7	Private	7
Total Number of Vacant Seats Per Each Sector	Poor	1	Public	1	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	9/9/2015	0	09/30/18
2. Howard Brown	Forsyth	Veterans	9/9/2015	0	09/30/18
3. Minnie Ervin	Forsyth	Gilmer, Bon-Air, 28th	4/1/2014	0	04/30/17
4. Mary Ford	Forsyth	Thurmond	12/14/2011	1	12/31/17
5. Chenita Johnson	Forsyth	North Winston	11/14/2011	1	11/30/17
6. Amatullah Saleem	Forsyth	Alder Pt.	1/9/2013	0	01/31/16
7. VACANT					
Public Elected Officials					
1. Chris Bryan	Forsyth	City	11/14/2012	1	11/30/18
2. Brian P. Burley	Forsyth	County	9/14/2014	0	09/30/17
3. Phillip Carter Sr.	Forsyth	County	9/14/2014	0	09/30/17
4. Chester David	Forsyth	County	9/11/2013	0	09/30/16
5. Toni Grace	Forsyth	City	11/14/2012	1	11/30/18
6. LaMonica Sloan	Forsyth	City	11/14/2012	1	11/30/18
7. Vacant					
Representatives of Private Organizations					
1. Rebecca Bender	Forsyth	Hanes Brands	2/11/2015	0	02/28/18
2. Bruno Capetta	Forsyth	BB&T	11/18/2015	0	10/30/18
3. David Clayton	Forsyth	Winston-Salem Police (Retired)	2/13/2013	1	02/28/18
4. Michael E. Harris	Forsyth	Forsyth Tech/Workforce Development	4/9/2014	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	1/14/2015	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
Brian P. Burley	4761 Kennington Terrace Court Winston-Salem, NC 27103	bburley@woodforest.com
Chris Bryan	159 Cramerton Court Lewisville, NC 27023	chris.bryan@bbandt.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
Toni Grace	110 S Stratford, Ste 500 Winston-Salem, NC 27104	tjg@blancolaw.com
LaMonica Sloan	301 Thompson Center Winston-Salem, NC 27110	lamonicasloan@gmail.com
Rebecca Bender	439 Horace Mann Avenue Winston-Salem, NC 27104	rebecca.bender@hanes.com
Bruno Capetta	2825 Reynolda Road Winston-Salem, NC 27106	bcapetta@gmail.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

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/Board Chair	Private	Forsyth
LaMonica Sloan	D&F Chair	Elected	Forsyth
Chester David	Program Chair	Elected	Forsyth
Amatullah Saleem	Officer	Poor	Forsyth
Jerry Romans	P&O Chair, Nom. Chair /Officer	Private	Forsyth
Rebecca Bender	Finance Chair/Officer	Private	Forsyth
Chenita Johnson	Officer	Poor	Forsyth
Laura Leigh Oyler	HR Chair	Private	Forsyth
Committee Name: Finance			
Rebecca Bender	Chairperson	Private	Forsyth
David Clayton		Private	Forsyth
Chris Bryan		Elected	Forsyth
Chester David		Elected	Forsyth
Naomi S. Blackmon		Poor	Forsyth
Howard Brown		Poor	Forsyth
Minnie Ervin		Poor	Forsyth
Committee Name: Development & Fundraising			
LaMonica Sloan	Chairperson	Elected	Forsyth
Toni Grace		Elected	Forsyth
Chenita Johnson		Poor	Forsyth
Rebecca Bender		Private	Forsyth
Michael E. Harris		Private	Forsyth
Jerry Romans		Private	Forsyth
Bruno Capetta		Private	Forsyth
Committee Name: Plans & Objectives			
Jerry Romans	Chairperson	Private	Forsyth
LaMonica Sloan		Elected	Forsyth
Chris Bryan		Elected	Forsyth
Mary Ford		Poor	Forsyth
Amatullah Saleem		Poor	Forsyth
David Myers		Private	Forsyth
Committee Name: Program			
Chester David	Chairperson	Elected	Forsyth
Toni Grace		Elected	Forsyth
Brian P. Burley		Elected	Forsyth
Chenita Johnson		Poor	Forsyth
Minnie Ervin		Poor	Forsyth
Laura Leigh Oyler		Private	Forsyth
Michael E. Harris		Private	Forsyth
Bruno Capetta		Private	Forsyth

Committee Name: Human Resources			
Laura Leigh Oyler	Chairperson	Private	Forsyth
Phillip Carter Sr.		Elected	Forsyth
Mary Ford		Poor	Forsyth
David Myers		Private	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 2016-17 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, DSS, Health Department, 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:**

The staff prepares the application based on the needs determined during the previous year's operation utilizing information that comes from the public, program participants, collaborative partners and fund sources. ESR's Administrative staff, accounting staff, and programmatic staff collaborate to ensure consistency, accuracy, and thoroughness in our current grant application. Changes in each year's grant application are the result of information gained through monitoring, assessment, and evaluation of the past year's Agency performance. Agency staff members monitor their caseloads closely for needed changes in services related to the current economic conditions and service provision trends.
 - c. **Agency's Board Members:**

The Board authorizes the staff to develop the application based on the information collected from the previous year's operation. Under the direction of our Executive Director, our Board has filled vacant Board positions, updated Personnel Policies and Procedures, and has participated in various orientation and training activities. The Board's secretary records Board activities in the minutes of our Board meetings. The current three-year plan (and specifically the CSBG proposal for PY 15-16) includes information gained through past planning activities, Board meetings, and the annual Board retreat. The Board makes recommendations as needed on our CSBG application and approves the application before submission.
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 (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.

**Community Services Block Grant Program
Fiscal Year 2016-17 Application for Funding
Planning Process Narrative (continued)**

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 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 handle?
- e) Will the project fill a major 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 care 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) To ensure immediacy, transparency, and accountability when using public funding to provide client services.

**Community Services Block Grant Program
Fiscal Year 2016-17 Application for Funding
Planning Process Narrative (continued)**

3. Describe activities that your agency has undertaken to advocate for and empower low-income individuals and families to achieve economic independence and security.
 - a) CSBG clients are encouraged to enroll in the IDA Program. The IDA Program promotes homeownership, which provides an opportunity for citizens to have a greater stake in their community. IDA graduates serve on 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 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.
 - 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.
 - e) The Forsyth Free Tax (EITC/VITA) Program empowers households by providing free tax preparation services, more money in clients' pockets from EITC returns, asset building counseling, and linkages to other asset building programs in the community.
 - f) ESR emphasizes financial literacy education.
 - 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, Department of Workforce Divisions, 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 Services Block Grant Program
Fiscal Year 2016-17 Application for Funding
Planning Process Narrative (continued)**

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.

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, both formal and informal, to partner or collaborative agencies to see that those who need services can obtain them. We constantly seek new service providers that we can tap to assist community residents that do not qualify for our programs. We also leverage services in collaboration with other programs and agencies to help our clients obtain more robust services without taxing any single agency's resources more than necessary.

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

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

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

**Community Services Block Grant Program
Fiscal Year 2016-17 Application for Funding
Planning Process Narrative (continued)**

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

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

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

ESR's *Road To Empowerment* workshop series focused primarily on asset building and financial literacy, but it dedicated a significant amount of time to application and interview skills to assist participants in obtaining higher paying jobs. As part of this initiative, ESR hosted a job fair that attracted a number of moderate to high paying employers. Seven of ESR's clients obtained 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.

**Community Services Block Grant Program
Fiscal Year 2016-17 Application for Funding
Planning Process Narrative (continued)**

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 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 on applicants who did not qualify for fuel assistance and referring to other sources as appropriate
- Tracking Emergency Assistance clients on the MCAH and AR4CA systems so that all community services providers will be aware of the EA services already provided to each client.

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

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

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

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. 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, 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 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.

- (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

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

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 September has declined to 5.7%, 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-sufficiency. Services offered without supportive services and intensive case monitoring are often unsuccessful. Recidivism often 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-sufficient, 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. 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.

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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

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Agency Strategy for Eliminating Poverty

(F) Resources Needed:

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

Section III: Goal and Strategy

(G) Long-Range Goal:

To move 206 families above Poverty Income Guidelines by June 30, 2019

(H) Strategies for Achieving Long-Range Goal:

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, rather than spending and consumption, as a way to increase net worth,
- e. Promoting asset accumulation as a new tool for combating generational poverty,
- f. Introducing clients to the Individual Development Account program as a new tool

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- g. to combat generational poverty,
- h. Introducing clients to NC Saves, which assists households in opening a savings account, assists in accumulation of savings, teaches financial literacy, provides a wealth coach, and helps establish good credit and reduce debt.
- i. 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.

**Community Services Block Grant Program
Fiscal Year 2016-17 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. Long-Range Goal:	To move 206 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, 2016	To	June 30, 2017	Plan Year	1	of 3
6. CSBG Funds Requested for this Project:	\$894,673					
7. Total Number Expected to Be Served:	206					
a. Expected Number of New Clients	106					
b. Expected Number of Carryover Clients	100					
8. Percentage of Long-Range Goal Expected to be Met this Year						33%

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 206 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, 2016 through June 30, 2017.						
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.	<i>Director of Agency Operations (Agency Ops)</i> <i>Self-Sufficiency Service Manager (SS Manager)</i> <i>Outreach Service Coordinator (Outreach Coordinator)</i> <i>Success Coach I</i> <i>Executive & Program Assistant (Exec Asst)</i> <i>Administrative Assistant (Admin Asst)</i> <i>Orientation/Eligibility Specialist (Orientation)</i> <i>Receptionist/Resource & Referral Agent (Reception)</i> <i>Technical Support Associate (Tech Support)</i>	120 (20 new)	149 (29 new)	177 (28 new)	206 (29 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 SS Manager Outreach Coordinator Success Coach I Exec Asst Admin Asst Orientation Reception	26 (26 new)	53 (27 new)	80 (27 new)	106 (26 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 SS Manager Outreach Coordinator Success Coach I	26 (26 new)	53 (27 new)	80 (27 new)	106 (26 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 SS Manager Outreach Coordinator Success Coach I Exec Asst Admin Asst Orientation	120 (20 new)	149 (29 new)	177 (28 new)	206 (29 new)
5. Accept referrals from and refer individuals to as many appropriate resources as necessary. Follow up/track referrals enrolled from other resources to determine program completions and results. 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 SS Manager Outreach Coordinator Success Coach I Exec Asst Admin Asst Orientation Reception	250 (250 new)	500 (250 new)	750 (250 new)	1,000 (250 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	
6.	To continue our cooperative work agreement with the Temporary Assistance for Needy Families (TANF)/WorkFirst program, including a formal work agreement for Individual Development Account (IDA) Program. The Community Services Block Grant (CSBG) Self-Sufficiency Program is a form of WorkFirst diversionary assistance in Forsyth County.	Executive Director Agency Ops SS Manager	5 (5 new)	10 (5 new)	15 (5 new)	20 (5 new)
7.	Provide individual counseling in such areas as: life skills, employment, housing, economic literacy, asset building, savings, budgeting, job search, etc.	Agency Ops SS Manager Outreach Coordinator Success Coach I	120 (20 new)	149 (29 new)	177 (28 new)	206 (29 new)
8.	Provide financial assistance for clients needing supportive services (food, shelter, household expenses, clothing, childcare, and transportation), work and education-related expenses, or any other barrier to self-sufficiency. Communication with Community Emergency Assistance Providers is through the Carolina Homeless Information Network (CHIN) system.	Agency Ops SS Manager Outreach Coordinator Success Coach I	120 (20 new)	149 (29 new)	177 (28 new)	206 (29 new)
9.	Provide exposure to and opportunity for Self-Sufficiency activities with all ESR services (IDA, Housing, Permanent Housing, NC Saves, Earned Income Tax Credit (EITC) program) through intra-agency referrals, interagency referrals, joint case staffing, and training of adjunct staff by the Director of Agency Operations)	Agency Ops SS Manager Outreach Coordinator Success Coach I	120 (20 new)	149 (29 new)	177 (28 new)	206 (29 new)
10.	Formulate, coordinate and conduct workshops designed to provide and/or enhance knowledge and skills needed to cope with or escape from a poverty lifestyle, i.e. consumer information, economic literacy, asset building, safety and crime prevention, parenting, etc.	Agency Ops SS Manager Outreach Coordinator	1 (1 new)	2 (1 new)	3 (1 new)	4 (1 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	
11. Accumulate detailed information through the maintenance of a case file system and a computerized client assistance recording software package, Accountable Results for Community Action (AR4CA). AR4CA stores and retrieves information efficiently and effectively.	Agency Ops SS Manager Outreach Coordinator Success Coach I Orientation	120 (20 new)	149 (29 new)	177 (28 new)	206 (29 new)	
12. 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 SS Manager Outreach Coordinator Success Coach I	72 hours outreach services (72 new)	144 hours outreach services (72 new)	216 hours outreach services (72 new)	288 hours outreach services (72 new)	
13. Coordinate with other community agencies and groups in order to initiate institutional changes that benefit low-income residents of Forsyth County through information sharing, community problem solving, planning, advocacy, etc. This is a quarterly meeting on a varying schedule.	Agency Ops <i>Development & Agency Relations Manager (Development)</i>	1 (1 meeting per quarter)	2 (1 meeting per quarter)	3 (1 meeting per quarter)	4 (1 meeting per quarter)	
14. Conduct annual evaluations of services and staff. This evaluation will include data from monthly, quarterly and semi-annual reviews.	Executive Director Agency Ops SS Manager				May 2016	
15. Staff cases with other agencies providing services as appropriate. These joint case staffing will assist in the activation of all available community resources in assisting families in becoming self-sufficient. The "Success" project will serve as the lead project for joint case staffing with agencies providing human services in Winston-Salem/Forsyth County.	Agency Ops SS Manager Outreach Coordinator Success Coach I	12 staffing (12 new)	24 staffing (12 new)	36 staffing (12 new)	48 staffing (12 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
16. Obtain clients from walk-ins, direct referrals, and recruitment efforts that result in clients coming to the Experiment In Self-Reliance to access services. Identify, and recruit potential participants in low-income communities to ensure that services are being made available to eligible clients who might not otherwise access services at ESR. The EITC VITA tax sites are providing ESR an opportunity to serve CSBG eligible clients that have never been in contact with self-sufficiency services before.	Agency Ops SS Manager Outreach Coordinator Success Coach I Development Admin Asst	20 (20 new)	53 (33 new)	80 (27 new)	106 (26 new)
17. 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 SS Manager Dev/Agency Rel Mgr Outreach Coordinator Success Coach I Orientation Reception	Jul Aug Sep	Oct		June
18. 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.	Tech Support SS Manager Outreach Coordinator Success Coach I Admin Asst Reception	120 (20 new)	149 (29 new)	177 (28 new)	206 (29 new)
19. 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 SS Manager Outreach Coordinator Success Coach I Development Tech Support Exec Asst Admin Asst	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)

**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
20. Collaborate Self-Sufficiency services with the Forsyth Free Tax Program. All CSBG clients are strongly encouraged use EITC/VITA 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 SS Manager Outreach Coordinator Success Coach I Development Tech Support Exec Asst Admin Asst	5	10 (5 new)	80 (70 new)	90 (10 new)
21. 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 SS Manager Outreach Coordinator Success Coach I	120 (20 new)	149 (29 new)	177 (28 new)	206 (29 new)
22. Implement new strategic planning 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 for ESR clients with employment training opportunities.	Agency Ops SS Manager Tech Support Development Outreach Coordinator Success Coach I Exec Asst Admin Asst Orientation Reception	192 hours (192 new)	384 hours (192 new)	576 hours (192 new)	768 hours (192 new)
23. 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 SS Manager IDA Program Manager Outreach Coordinator Success Coach I Orientation Reception	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)

**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
24. 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 SS Service Mgr Outreach Coordinator Success Coach I Admin Asst Orientation Reception	4 (2 new)	6 (2 new)	8 (2 new)	10 (2 new)
25. ESR's focus on financial literacy and asset building has become a growing program trend for our clients. We want to continue to focus on bringing additional resources to bear that will offer more clients of our core programs access to this type of training, education, and information. We have leveraged local funding sources to provide Financial Literacy and Asset Building classes such as <i>Money Management</i> and <i>Budgeting Your Money Effectively</i> in partnership with local banks and collaborative agencies.	Executive Director Agency Ops SS Manager Outreach Coordinator Success Coach I Admin Asst Orientation Reception	6 classes (6 new)	12 classes (6 new)	18 classes (6 new)	24 classes (6 new)
26. 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 SS Manager Outreach Coordinator Success Coach I Admin Asst Orientation Reception	10 clients (10 new)	20 clients (10 new)	30 clients (10 new)	40 clients (10 new)
27. 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 SS Manager Development	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 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
28. ESR Success Coaches are working with clients to reduce their debt and increase their credit score by collaborating with Financial Pathways of the Piedmont to analyze client's credit, and assist with repairing of credit in order to put clients on the road to asset building for a brighter future.	Agency Ops SS Manager Outreach Coordinator Success Coach	10 (10 new)	20 (10 new)	30 (10 new)	40 (10 new)
29. 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 SS Manager Outreach Coordinator Success Coach I Admin Asst 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 2016-17 Application for Funding
One-Year Work Program
OEO Form 212 (continued)**

10. 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 are required to complete Table 1. Please refer to *Performance Measures and Outcomes Definitions* on page 7 of the Fiscal Year 2016-17 CSBG Application Instructions. If your agency operates more than one project, you will also need to complete Table 2 on the following page. There should be one table of outcome measures per project.

Table 1 Outcome Measures for Project 1 (Self-Sufficiency)	
Measure	Expected to Achieve the Outcome in Reporting Period (Target)
The number of participant families served.	206
The number of low-income participant families rising above the poverty level.	69
The number of participant families obtaining employment.	8
The number of participant families who are employed and obtain better employment.	40
The number of jobs with medical benefits obtained.	9
The number of participant families completing education/training programs.	27
The number of participant families securing standard housing.	4
The number of participant families provided emergency assistance.	25
The number of participant families provided employment supports.	40
The number of participant families provided educational supports.	88
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 2016-17 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.	
The number of low-income participant families rising above the poverty level.	
The number of participant families obtaining employment.	
The number of participant families who are employed and obtain better employment.	
The number of jobs with medical benefits obtained.	
The number of participant families completing education/training programs.	
The number of participant families securing standard housing.	
The number of participant families provided emergency assistance.	
The number of participant families provided employment supports.	
The number of participant families provided educational supports.	
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 2016-17 Application for Funding
One-Year Work Program
OEO Form 212 (continued)

11. 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 2016-17 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, 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 our agencies and programs. We learn from them how our activities parallel or diverge from expectations 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 crucially important 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 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 (2013-2015).

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 nearly 3,000 people. This program seeks to educate taxpayers about the Earned Income Tax Credit and assist them in receiving the credit for their households. In the past two years, we have saved taxpayers at least \$1 million in total tax refunds to Forsyth County, half of which stemmed from the EITC credit. 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 December 2011 and entered implementation phases during 2013. 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 Winston-Salem Foundation funded our strategic planning process. The Board chose Karl Yena, an outside consultant, to conduct the strategic planning process. The result of the process is a five-year strategic plan, covering the time period from 2013 through 2017.

Major tasks/changes regarding this plan include the following.

- Revise vision and mission statements - Completed
- ESR will align with community goals - Ongoing
- Revise "Core Values" - Completed
- Update Succession Plan - Completed
- Establish Salary Rate Scale - 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
- Change Transitional Housing Program to Housing Services to meet new HUD guidelines - Completed
- 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
- ESR will continue to work in concert with the Winston-Salem/Forsyth County 10 Year Plan to End Chronic Homelessness - 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. ESR has purchased land in the community to continue to be easily accessible to our target population, to modernize our facilities, and to preserve our rich cultural heritage. -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. ESR hosted a 50th Year Celebration to launch our Annual Giving Campaign. Expanding the donor base is ongoing.

**Community Services Block Grant Program
 Fiscal Year 2016-17 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	

OEO Form 225N-The Budget Narrative

Section III-Budget Summary			
Indirect Cost Rate Information: ESR has no cognizant agency; an outside auditor that does not do our audit, Butler & Burke, prepared an Indirect Cost Rate Proposal Examination Report 1/22/15.			
Section IV-Salary and Wages			
Staff Names and Positions:			
Fred Bazemore – Dir. Agency Ops (50% CSBG;50% Management Services);			
Sherri Paysour – SS Mgr(100% CSBG);			
Willa Hines – Receptionist/Resource& Referral Agent/Refer (75% CSBG; 25% Housing)			
Kimberly Simms – Success Coach I (100% CSBG)			
Brigitte Stowe - Orientation Specialist (75% CSBG; 25% Housing)			
Beverly Alexander– Success Coach I (100% CSBG)			
Deborah Thomas – Executive & Program Assistant (40% CSBG; 60% Management Services)			
Shadowe Magaraci – Administrative Assistant (75% CSBG; 25% Management Services)			
James Cherry – Technical Support Associate (40% CSBG; 60% United Way)			
Victoria Hutchins – Development/Agency Rel. Mgr (20% CSBG; 80% United Way)			
Section IVa-Budget Support Data			
Fringe Benefits: Calculations provided on OEO Form 225			
Communications: Postage: 100 pieces/mo. x \$0.48 x 12 mo = \$65/mo x 8.25 exts = \$536/mo x 12 mo			
Section IVb-Budget Support Data			
Equipment:			
Section IVc-Budget Support Data			
Space Costs: 3480 Dominion St. depreciation schedule provided by auditor \$9,071 mo. X 12 mos. X 27.5%			
Travel: NCCAA Spring Conference: \$157.41 per diem x 4 days x 4 staff; OEO Contractor Training: \$157.41 per diem x 2 days x 4 staff			
Supplies/Materials: All explanations are provided in OEO Form 225			
Section IVd-Budget Support Data-Contractual			
Sub-contractor [DBA if applicable]	Preston Sims & Darden, P.A.	Primary Contact	Mark T. Preston
Address/Phone	3410 Healy Drive, Suite 201-K Winston-Salem, NC 27103		
Service Description	Agency audit and Form 990		
Payment Arrangement	\$100 per hour billing rate with a maximum of \$17,000	Contract Duration	6/30/14, 6/30/15 and 6/30/16 auditing and income tax serv.
Sub-contractor [DBA if applicable]	Community Action Opportunities	Primary Contact	Carey Gibson
Address/Phone	25 Gaston Street Asheville, NC 28801 828-252-2495		
Service Description	AR4CA annual subscription fee		

Payment Arrangement	Pay per annual invoice ----- US Bank Equipment Finance 1310 Madrid St. Suite 101 Marshall, MN 56258-4002 Savin MP50025 copier 36 payments of \$365	Contract Duration ----- 36 mos. 5/20/14 - 5/20/17 800-328-5371	Annual -----
Sub-contractor [DBA if applicable]	D&K Fresh Start	Primary Contact	Larry McMillian
Address/Phone	3015 Maplewood Ave. Suite 201 W-Salem, NC 27103 336-765-8930		
Service Description	Cleaning Service		
Payment Arrangement	\$1,500 month	Contract Duration	one year, automatically renew for one year periods on anniversary date (can be terminated at any time with 30 day written notice from either party)
Sub-contractor [DBA if applicable]		Primary Contact	
Address/Phone			
Service Description			
Payment Arrangement		Contract Duration	
Section IVe-Budget Support Data			
Client Services: Based on program eligibility			
Other: Property and general liability on main office prorated by occupancy			



**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: January 7, 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 12, 2016**

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

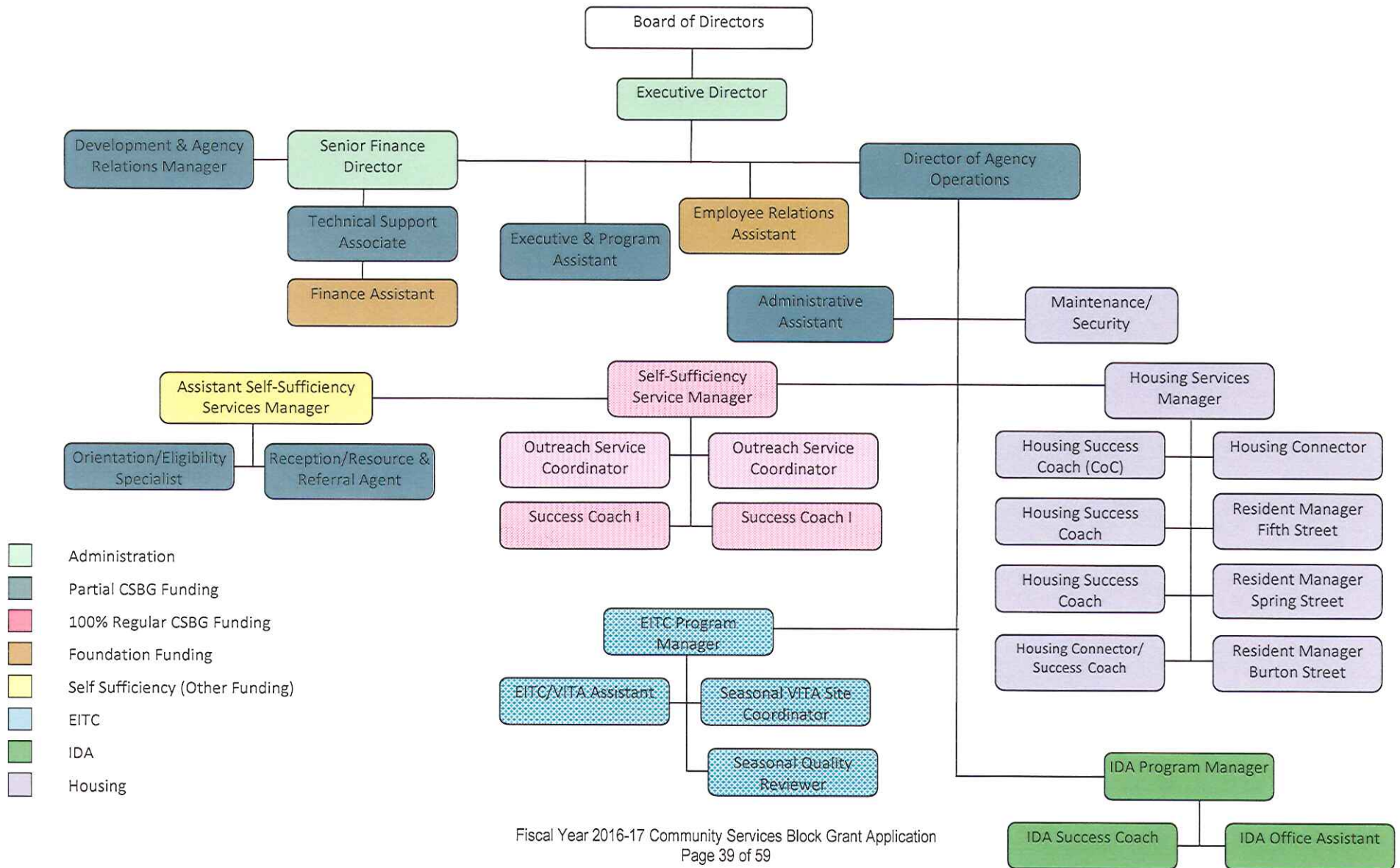
Witness/Notary

Date

<u>Appendices:</u>	
• Organizational Chart (do not include names)	✓
• Job Description and Resume for the Agency's Executive Director	✓
• Job Description and Resume for the Agency's Chief Financial Officer	✓
• Job Descriptions for all CSBG employees (do not include names)	✓
• Affirmative Action Plan	✓
• Documentation of Public Hearings for Initial Planning Process:	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 documents (.pdf)
Copy of advertisement(s)	
• Documentation of Submission to County Commissioners:	Separate document (.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

ESR Organizational Chart

December 1, 2015



Position Description---Executive Director

Primary Role:

The Executive Director is responsible for the administration of Experiment In Self-Reliance, including operation 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, and all other decisions that reflect on the successful operation of the agency upon appropriate consultation and direction of the Board of Directors. The Executive Director is responsible for administering the policies and procedures established by the Board of Directors in the everyday operation of the agency.

Added Function:

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.

Grant writing for City, County, CSBG, CDGB, ESGP, United Way, and HUD related funding sources. Fundraising (nonprofit-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:

- 1) Responsible for designing, developing, and providing capacity building services to low-income individuals/families in need.
- 2) Focus on creating and maintaining a structure that engenders self-sufficiency in people.
- 3) 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.
- 4) Delegating 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.
- 5) Hiring, assigning, evaluating, setting salaries, and terminating employees, subject to review of the Board of Director's Personnel Committee.
- 6) Maintaining appropriate working environment for employees and clients.
- 7) Undertaking other duties and responsibilities as the Board of Directors may from time to time assign.
- 8) To serve as a team player and assist in furthering the mission of the organization.
- 9) To serve as an ambassador for the Experiment In Self-Reliance and respect the integrity of the organization.

Qualifications:

Minimum qualifications for this position include Bachelor of Science (BS) in Social Work, Business Administration or a related field, and a minimum of ten years experience of successfully proven administrative leadership of an agency or social service organization, superior written and oral communication skills, and a depth of knowledge and experience working with disadvantaged, underprivileged populations.

Twana Wellman-Roebuck
570 Oxford Street
Winston-Salem, NC 27103
(336) 765-3886 – Home (336) 722-9400, Ext. 416

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

Position Description ---Senior Finance Director

Primary Role

The Senior Finance Director (SFD) 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. Act as Executive Director (ED) in the absence of the director in concert with the public communications and agency operations functions of the agency.

1. Manages Controllershship duties of all financial operations such as responsible for presenting and reporting accurate and timely historical financial information of the agency.
2. Oversee Treasury duties – The Senior Finance Director works in concert with the Executive Director and Board Finance Committee in deciding how and when to invest the agency’s money or best accounts to place the funds in , taking into consideration risk and liquidity. In addition, the SFD oversees the capital structure of the agency in agreement with the ED and DAO, determining the best mix of debt, equity and internal financing. .
3. Aid in developing economic strategy and forecasting - SFD maintains the agency’s past and present financial records; he or she is also an integral part of the agency’s financial future. A SFD must be able to identify and report what areas of the agency are most efficient and how the agency can capitalize on this information. . This aspect of a SFD's duties also includes economic forecasting and modeling - in other words, trying to predict (given multiple scenarios) the best way to ensure the agency's success in the future.

Reports To: Executive Director

Duties:

- 1) Assures that the bookkeeping methods and practices are in keeping with requirements of the funding sources and the Experiment In Self-Reliance.
- 2) Applies principles of accounting to install and maintain operation of general system.
- 3) Prepares financial reports and insures submission at required due dates.
- 4) Assist in the preparation of budgets annually of all grants.
- 5) Prepares and files federal and state tax returns and other regular and special tax reports to government agencies (Form 990).
- 6) Assists the Executive Director in the development and preparation of budgets and general accounting procedures.
- 7) Provides consolidated financial reports for presentation to the Board of Directors, and/or as requested by Executive Director.
- 8) Maintain the purchasing system within the agency in ordering office supplies and equipment and other items purchased---also maintains the stockroom for supplies requisitioned.
- 9) Attend Board of Directors and Finance Committee meetings.

Qualifications:

A Bachelor of Arts Degree or Bachelor of Science Degree in Accounting and 5-8 years experience. No history of bad debts or criminal convictions, and must be bondable. Individual must be computer literate and maintain all levels of confidentiality organizationally.

DEBRA NEWSOME PERKINS

3526 Grandview Club Road
Pfafftown, North Carolina 27040

(336)924-6784
(336)722-9400 ext. 413
(336)650-6222

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

**Experiment in Self-Reliance
Position Description-Outreach Service Coordinator**

Primary Role

The Outreach Service Coordinator will be responsible for all direct work with clients and serve as liaison with other collaborating partners. The Outreach Service Coordinator will assist each client in developing case plan, and work closely with the client to achieve the benchmarks in the case plan, by providing timely counseling and appropriate intervention in order to assist each client along in successfully completing their case plan. Outreach Service Coordinator will make enrollment decisions, facilitate referral services and consult with immediate supervisor regarding any client that may need additional developmental planning to achieve self-sufficiency.

Reports To: Self-Sufficiency Service Manager

Duties:

- 1) Maintains a minimum of (60) caseloads.
- 2) Provides programmatic statistical data by funding source to Program Service Manager monthly.
- 3) Provides written documentation for enrollment process.
- 4) Maintains accurate case files as defined by program guidelines and maintain AR4CA computerized client record system conducive to NC ROMA principles.
- 5) To participate bi-monthly contact with clients to monitor case plan progress.
- 6) Assists in the development of the case plan by monitoring, evaluating, modifying case plan when necessary.
- 7) Provides ESR core services on site for collaborating partners.
- 8) Maintains working knowledge of programs, guidelines and other related regulations pertaining to the clientele.
- 9) Serves as the liaison on partner agency committees relating that serves the underserved citizens.
- 10) Serves as an ambassador for the Experiment in Self-Reliance and respect the integrity of the organization.
- 11) Serves as a team player in furthering the mission of the organization.
- 12) Utilizes supervision effectively.
- 13) Performs other duties as required by the Program Service Manager.

Qualifications:

Outreach Service Coordinator must be an experienced caseworker with a 4-year college degree. Have strong interpersonal and communication skills. Must be bi-lingual, possess a valid NC drivers' license, and have personal available transportation. Outreach Service Coordinator must have working knowledge of computer data entry process, Microsoft programs, and other related software program.

**Experiment in Self-Reliance, Inc.
Position Description – Orientation/Eligibility Specialist**

Primary Role:

The Orientation/Eligibility Specialist is responsible for secretarial, clerical, intake duties and determining eligibility/suitability for clients potentially enrolling in the Self-Sufficiency Program.

Reports To: **Self-Sufficiency Service Manager**

Duties:

1. Makes initial contact with clients to provide screening and surface level assessments and communicate income requirements to potential ESR participants through a structured interview.
2. Determine eligibility and process income calculations based on a 90 day look back for CSBG participants and calculate a projected income for a 12 month period for HEARTH Act/ESG participants.
3. Coordinates with the Receptionist/Resource Referral Agent to direct clients to appropriate staff and/or refer clients to appropriate agency or other service providers.
4. Maintains a centralized database system, including accurate and confidential files via AR4CA, HMIS, CHIN and other program specific systems.
5. Have the ability to simultaneously multitask and interface with various desktop platforms.
6. Facilitate and provide basic agency orientation services/information at job/career fairs as needed.
7. Coordinate Days of Caring and other holiday projects for clients
8. Performs other job related duties as required, including but not limited facilitate orientation presentations, attend program specific trainings and conduct information sessions for potential funders.
9. To serve as an ambassador for the Experiment in Self-Reliance and respect the integrity of the organization.

Qualifications:

The Orientation/Eligibility Specialist requires an Associate Degree in Human Services with a strong background in math, effective communications skills, a strong sense of responsibility, the ability to manage time effectively, and good presentation skills. The Orientation/Eligibility Specialist will have a working knowledge of ROMA, CSBG, the HEARTH Act, computer/data experience interacting in a professional social service setting, and be familiar with case management processes. Also have the ability to learn the homeless eligibility and income requirements under ESG/The HEARTH Act. Experience working with a diverse setting is a plus.

Preferred:

Bachelor's Degree in Accounting/Business

Experiment in Self-Reliance, Inc.
Position Description---Receptionist/Resource and Referral Agent

Primary Role:

The Receptionist/Resource and Referral Agent is responsible for answering calls in a professional and respectful manner, greeting clients with full emphasis placed upon customer satisfaction, and receiving and welcoming visitors. The Receptionist/Resource and Referral Agent is also responsible for making referral to other outside sources.

Reports To: Self-Sufficiency Service Manager

Duties:

1. Answering incoming calls promptly and making the appropriate connections.
2. Contacting the phone company immediately when the system malfunctions and informing the Self-Sufficiency Service Manager of the problem.
3. Greets clients and visitors in a professional, mannerly, and respectful fashion with full emphasis upon customer satisfaction.
4. Making sure the planned staff coverage of switchboard duties during lunch hour.
5. Makes long distance phone calls and properly documenting information in telephone log.
6. Ability to provide an overview of agency services and outside available services for referral.
7. Be available for coverage in the absence of the Orientation Specialist.
8. Performs some general clerical duties and other job related duties as required.

Qualifications:

The Receptionist/Resource and Referral Agent position requires a high school diploma (or equivalent), some knowledge of telephone/switchboard system operation, friendly and pleasant personality style, patient manner related to telephone skills, and a clearly understood speaking voice. Some typing skills are required.

**Experiment in Self-Reliance, Inc.
Position Description – Success Coach I**

Primary Role:

The Success Coach will be responsible for all direct work with customers. The Success Coach will assist each client in developing the Case Plan, and work closely with the client to achieve the benchmarks in the case plan, by providing timely counseling and appropriate intervention in order to assist each customer along in successfully completing their case plan. The Success Coach will work closely with other community agencies or real estate owners to assure self-sufficiency or adequate housing opportunities for clients

Reports To: Self-Sufficiency Program Manager

Duties:

1. To maintain a minimum of (45) caseloads.
2. To provide programmatic statistical data by funding sources to Program Manager monthly.
3. To participate and provide written and oral documentation for weekly case management enrollment process.
4. To maintain accurate case files as defined by program guidelines and maintains AR4CA computerized client record system conducive to NC ROMA principles.
5. To provide monthly contact with clients to monitor case plan progress.
6. To provide profile information to Program Manager.
7. To assist in the development of the case plan by monitoring, evaluating and modifying case plan when needed.
8. To serve as an ambassador for the Experiment in Self-Reliance and respect the integrity of the organization.
9. To serve as a team player and assist in furthering the mission of the organization.
10. To assist in other special projects as determined by Director of Program Operations or Program Service Manager.

Qualifications:

Success Coach must be an experienced case worker, with a college degree, or a minimum of 2 years experience, background in social work, or housing or related field. Have strong interpersonal and communication skills. Experience working with low-income individuals and families. Success Coach must have working knowledge of computer data entry process of the Windows and other related software programs.

Experiment in Self-Reliance, Inc.

Position Description – Self-Sufficiency Service Manager

Primary Role:

The Self-Sufficiency (SS) Service Manager will provide leadership to the Outreach Coordinators and coaching tips to the Success Coaches to develop and implement client Case Plans. The SS Program Manager will monitor and evaluate service delivery to clients, track program data monthly for all funding sources, to assure the execution of NC ROMA principles through the department, provide daily monitoring of orientation, data clerk and receptionist positions, provide bi-monthly written updates of self-sufficiency service accomplishments and enhancement opportunities.

Reports To: Executive Director and Director of Program Operations

Duties:

1. Maintains a minimum of (5) caseloads.
2. Provides leadership to Outreach Service Coordinators and supervises staff to ensure that AR4CA computerized client record system is maintained.
3. Manages the IDA program under the Self-Sufficiency umbrella of CSBG funded services.
4. Provides programmatic statistical data by funding source to Administrative Assistant or Financial and Technical Associate monthly.
5. Participates and provides written and oral update to Executive Director and Director of Program Operations during bi-weekly meetings.
6. Provides direct service to clients with special needs.
7. Provides monthly review with Outreach Service Coordinators and Success Coaches to assure client Case Plan progress is made.
8. Develops, plans, and implements annual neighborhood meeting to determine the needs to the working poor and get client feedback in Self-Sufficiency services.
9. Attends and serves on community job related committees to stay abreast of changes in agency service populations.
10. Maintains working knowledge of guideline or regulations regulated to DSS, Higher Learning Institutions, Work First, etc.
11. Serves as an ambassador for the Experiment in Self-Reliance and respect the integrity of the organization.
12. Serves as a team player and assist in furthering the mission of the organization.
13. Assists in other special projects as determined by Executive Director or Director of Program Operations.

Qualifications:

Self-Sufficiency Manager must be trained social worker with a 4-year college degree and/or minimal of 4-8 years experience and a background in housing or related field. Have strong interpersonal and communication skills. Have experience working with low-income individuals and families. SS Service Manager must have working knowledge of computer data entry process, Microsoft programs, and other related software programs.

Experiment in Self-Reliance, Inc.
Position Description – Director of Agency Operations

Primary Role

The Director of Agency Operations plans, coordinates, and directs a broad range of services that allows the organization to operate efficiently. The person in this position will insure that agency programs and facilities operate as intended by the Executive Director, Board of Director and as defined by agency guidelines and funding sources. The person in this position will provide leadership for Program Managers and insure that the services provided are sufficient to meet the agency goals of individual self-sufficiency, design and conduct monthly staff development meetings designed to update and upgrade the quality of services the agency provides, and serve in an administrative capacity in all matters relevant to employment of direct service workers in the agency. Develop in-house tracking system utilizing programmatic data from program managers, data clerk and computer technician. Attend and assist Executive Director in the bi-weekly monitoring of Program Managers progress of aiding Success Coaches, Caseworkers in meeting client case plans.

The Director of Agency Operations coordinates space allocation, facilities maintenance and operations, and major property and equipment procurement, security, recycling, wellness and transportation services if needed. This position ensures that contracts, insurance requirements, and government regulations and safety standards are followed and up to date.

They may examine energy consumption patterns, technology usage, and personal property needs to plan for their long-term maintenance, modernization and replacement.

Reports To: Executive Director

Duties:

1. To assist the Executive Director in all matters related to the employment of direct service workers
2. To assist Executive Director in providing leadership for Program Managers, Caseworkers, Maintenance and Facilities management
3. To receive programmatic statistical data and analysis from Program Managers, clerical support or computer technician in preparation for presentation to Executive Director, Board and Funding Sources
4. To participate and provide written and oral update to Executive Director during bi-weekly meetings
5. To provide written update for monthly board meeting
6. To provide written update and support for Internal Operations Committee
7. To re-train and upgrade new and existing agency staff
8. To design and conduct monthly staff development meetings for the purpose of improving the quality of services
9. To provide monthly assessments to the Executive Director and Sr. Finance Director for facilities management
10. To review the services of the agency to insure that they meet the goals set forth in agency guidelines
11. To prepare budget request to support service goals in concert with the Executive Director
12. To attend and serve on community job related committees to stay abreast of changes in agency service population
13. To stay abreast of guideline or regulations regulated to all funding sources
14. To assist in other special projects as determine by Executive Director or Board of Directors
15. To monitor services in the wider Winston Salem community to insure that agency services are appropriate to community problems, and develop proposals for service changes when necessary
16. To serve as an ambassador for the Experiment In Self-Reliance and respect the integrity of the organization
17. To serve as a team player and assist in furthering the mission of the organization
18. To aid the Sr. Finance Director in leadership in the absence of the Executive Director

Qualifications:

Social Work Degree or related field a minimal of 8-10 years experience in Business Administration. Experience in low-income population; with proven supervisory or administrative content. Must have a capacity to work cooperatively with persons with varied personal backgrounds, and be able to supervise and lead program managers, caseworkers, maintenance, property management, as well as build appropriate referral networks in the community. Strong interpersonal, written, and oral skills.

**Experiment in Self-Reliance, Inc.
Position Description – Administrative Assistant**

Primary Role:

The Administrative Assistant is responsible for all clerical support for the Self-Sufficiency Program.

Reports To: Sr. Finance Director, Director of Program Operations, and Development Manager

Duties:

1. Performs specialized and complex clerical and administrative duties, as assigned.
2. Schedules appointments, gives information to callers, takes dictation and aids in planning clerical work and minor administrative details.
3. Aids in writing CSBG proposal, compiles data for CSBG reports and provides clerical support the Self Sufficiency Department as needed.
4. Establishes and maintains efficient office files and recordkeeping procedures for CSBG grants.
5. Types letters, forms, reports, tabulations and other materials from copy or rough draft.
6. Assists in the establishment and implementation of the computer data collection system conducive to NC ROMA principles.
7. Monitors and maintains the flow of all necessary records and reports.
8. Compiles and types statistical and other special reports.
9. Records minutes of program staff meetings and other conferences to be transcribed into typewritten copy.
10. Compiles time sheets for group time and attendance to be submitted to the Human Resources Office.
11. Provides backup to Receptionist/Information and Referral Agent, Intake Desk and/or other clerical staff as needed.
12. Serves as an ambassador of the Experiment in Self-Reliance and respect the integrity of the organization.
13. Serves as a team player and assists in furthering the mission of the organization.
14. Performs other job-related duties as required by the Director of Program Operations.

Qualifications:

The Administrative Assistant should possess a two-year Associate Degree in office technologies and/or three years experience in the field of office technology. This position should also be completely literate in computer operations.

**Experiment In Self-Reliance, Inc.
Position Description ---- Development and Agency Relations Manager**

Primary Role:

The Development and Agency Relations Manager aids in creating and executing a strategy for a large sustained base of annual individual donors. This position seeks and maintains current foundations and public funding, along with staying abreast of public policy related topics that might impact current or future funding. As the Agency Relations representative acts as one of the agency spokesperson while developing speaking points and any public information concepts that could further the vision and mission of the agency. Disseminates facts and information regarding the Experiment In Self-Reliance, Inc. (ESR) activities and/or services to the general public and is known as the "Public Information Officer".

Responsibilities

- ☑ Develop and execute Experiment In Self Reliance's annual fundraising plan
- ☑ Secure financial support from individuals, foundations and corporations
- ☑ Manage the implementation for data entry and gift processing
- ☑ Develop and maintain ongoing relationships with major donors
- ☑ Overseeing organization of special events
- ☑ Developing and tracking proposals and reports for all foundation and corporate fundraising

Reports To: Executive Director**Duties:**

- 1) Plans and conducts public relations program designed to create and maintain favorable public image for the agency.
- 2) Plans and directs development and communication of information designed to keep public informed of the agency's service delivery, accomplishments, or point of view.
- 3) Arranges for public relations efforts in order to meet needs, objectives, and policies of individuals, special interest groups, business concerns, non-profit organization, or governmental agency.
- 4) Serves as an in-house staff member or as outside consultant.
- 5) Prepares and distributes fact sheets, news releases, photographs, video tapes, brochures, and compose letters using the computer for media representatives and other persons who may be interested in learning about or publicizing the agency's activities.
- 6) Purchases advertising space and time as required upon the approval from the Executive Director.
- 7) Promotes goodwill through such publicity efforts as speeches, displays, tours, recruiting student interns, volunteers and question/answer sessions.
- 8) Represents employer during community projects and at public, social, and business gatherings.
- 9) Confers with production and support personnel to coordinate production of television advertisements and on-air promotions.
- 10) To serve as a team player and assist in furthering the mission of the organization.
- 11) To assist in other special projects as determined by the Executive Director or Assistant Director.

Qualifications

The Development and Agency Relations r should possess a 4-year college degree, preferably in the field of Marketing, and with a minimal of 5-6 years experience in fundraising. Strong interpersonal and communication skills.

Experiment in Self-Reliance, Inc.
Position Description—Technical Support Associate

Primary Role:

The Technical Support Associate will be responsible for computerized technology of the agency and basic financial task that is subject to review and supervision by the Finance Director and Executive Director including reconciling financial records, executes purchasing system for the agency, deliver agency related checks, and maintaining the server, hardware/software for the agency.

Reports To: Finance Director

Duties:

1. Manages the agency information system.
2. Aids the Director of Program Operations in the computerized compilations of program reports utilizing software AR4C monthly conducive to NC ROMA principles.
3. Aids the Director of Program Operations and Program Managers in generating specialized programmatic reports utilizing the AR4C and CHIN for monthly and quarterly reports.
4. Performs technological duties associated with the overall agency automation plan.
5. Analyzes the agency computer technology needs and makes recommendation when replacement or upgrading is necessary.
6. Ability to retrieve computer data daily and provide “back up” files for the agency’s database programming.
7. Maintains computer hardware and software packages along with making recommendations when replacement or upgrading is necessary.
8. Responsible for training staff in basic computer skill areas.
9. Maintains the purchasing system within the agency, which orders office supplies, equipment and other items, along with maintaining the stockroom for supplies requisitioned.
10. Provides computer-programming needs.
11. Assists with all bookkeeping methods and procedures.
12. Assists in the development and/or preparation of budget and budget revisions for all ESR programs.
13. Assists Finance Director in preparation for agency funding officials and auditors in annual audits.
14. Assists Finance Director in the review of check requests to vendors and client assistance (Housing and Self-Sufficiency Program).
15. Assists in implementing a web-based data storage system to capture CSBG data to be used to demonstrate program effectiveness to political and community leaders.
16. Serves as an ambassador for the Experiment in Self-Reliance and respect the integrity of the organization.
17. Serves as a team player and assists in furthering the mission of the organization.

Qualifications:

The Financial/Technical Associate should have a Bachelor of Arts Degree or Bachelor of Science Degree in Accounting with at least three years experience. No history of bad debts or criminal convictions. The Financial/Technical Associate should possess at least an Associate Degree in Computer Technology and/or Information Systems. Two years of work experience in network maintenance involving Windows XP, SBS (small business server), Server 2002/2003, VERITAS Backup Exec, and Microsoft Office Suites particularly Access.

Experiment in Self-Reliance, Inc.
Position Description---Executive & Program Assistant

Primary Role:

The Executive Program Assistant is responsible for all administrative office practices, procedures, and equipment. The Executive Program Assistant should demonstrate the ability to learn and operate the agency computer systems. The Executive Program Assistant provides information and referral, programmatic data entry and backup for the reception/orientation process. Has the ability to maintain confidentiality and to perform in a professional manner at all times. Has the ability to meet the public courteously and to establish and maintain effective working relationships with other employees and clients.

Reports To: Executive Director

Duties:

1. Performs specialized and complex clerical and administrative duties as assigned.
2. Schedule appointments, give information to callers, take dictation and otherwise relieves officials of clerical work and minor administrative and business details.
3. Establishes and maintains the flow of all necessary records and reports conducive to NC ROMA principles.
4. Types and prepares letters, forms, reports, minutes, tabulations and other materials from copy or rough draft.
5. Assists in the establishment and implementation of the data collection system.
6. Monitors and maintains necessary records, documents and reports.
7. Makes travel reservations for staff attending meetings/conferences out of town.
8. Pick up in-coming mail at the local Post Office and distribute mail to appropriate staff.
9. Responsible for processing monthly billings (accounts payable) to be submitted to the Finance Department.
10. Receive all merchandise purchased by the agency and pick up supplies when necessary.
11. Record minutes of all staff and board meetings to be transcribed into a typewritten copy.
12. Maintains Human Resources files, post job vacancies internally and prepares advertisements for job vacancies with ESC and other employment agencies, prepares documents for drug testing screening, conducts orientation with new hires, and other human resources related duties as needed.
13. Prepares group time and accumulative time for payroll purposes to be submitted to the Finance Department.
14. Supervises other clerical staff as assigned.
15. Serves as an ambassador for the Experiment in Self-Reliance and respect the integrity of the organization.
16. Serves as a team player and assists in furthering the mission of the organization.
17. Performs other job related tasks as required by the Executive Director.

Qualifications:

The Executive Program Assistant should possess a two-year Associate Degree or 4-year College Degree. The Executive Program Assistant should be proficient in Microsoft programs and other related computer operations. The Assistant should have at least three years experience in general office work environment is preferred.

Experiment In Self-Reliance, Inc. Affirmative Action Plan

Equal Employment Opportunity (EEO) Policy Statement

It has been and will continue to be the policy of the Experiment In Self-Reliance, Inc. to extend equal employment opportunities to all qualified employees and applicants for employment without discrimination because of race, color, sex, national origin, religion, age, equal pay, disability, military status, and/or genetic information. All phases of employment will be administered so as to further the principal of equal employment opportunity. These phases include but are not limited to: recruitment, hiring, placement, upgrading, promotion, transfer, reduction in force, recall, termination, selection for Organization-sponsored training, rates of pay, and other forms of compensation, use of facilities, and participating in Organization-sponsored activities.

Purpose

The purpose of the Affirmative Action Plan (AAP) of Experiment In Self-Reliance, Inc. is to define the Equal Employment Opportunity policy, establish responsibility for the Plan within the Organization and establish reasonable and attainable goals for recruiting, hiring, placing, promoting, training and compensating minority candidates.

Under-Utilization

To reduce the likelihood of any under-utilization, Experiment In Self-Reliance, Inc. will continue to use good faith efforts to locate, consider and place qualified minority candidates in all job groups. Efforts are designed to attract minority applicants, and consideration is given to internal minority candidates who are qualified for vacancies.

Dissemination of Affirmative Action Plan

A. Internal:

1. Copies of the Affirmative Action Plan will be distributed to appropriate members of management.
2. Program managers and supervisory personnel will receive instruction regarding the Plan to ensure the purpose and comprehension of the Plan.
3. The Organization's EEO policy is printed in the employee handbook, which is provided to all employees upon hire.
4. Applicable posters regarding Equal Employment Opportunity are posted on employee bulletin boards in each organization facility.
5. New employees are informed of the Organization's policy regarding equal employment opportunity via the Policies and Procedures Manual review conducted during the New Employee Orientation process.
6. The Organization's policy regarding equal employment opportunity is thoroughly discussed in the process of orienting and training members of management.
7. The Organization's application for employment form and stationary include the prominent annotation "An Equal Opportunity Employer." Other marketing materials include the EOE tagline as well.
8. This plan is also available to any employee upon request.

B. External:

1. The phrase "Equal Opportunity Employer" is used in all advertising. Recruiting advertisements are posted on the Organization's website, in the local newspaper, and with the N.C. Division of Workforce Solutions, as well as various online job boards.
2. The Experiment In Self-Reliance, Inc. Application for Employment notifies prospective employees that the Organization is an Equal Opportunity employer.
3. Should the Organization feature any employees in advertisements, both minorities and females will be featured.

Responsibility for Implementation of Affirmative Action Plan (AAP)

Experiment In Self-Reliance, Inc. recognizes that the ultimate success of this Plan is largely dependent upon clearly defined areas of responsibility for implementation as well as total commitment of levels of management and employees toward achieving its goals.

A. The **Executive Director** provides leadership and direction in the development and implementation of the AAP including:

1. Assigning responsibility for preparation, updating, and implementation of the AAP.
2. Annually reviews the AAP with the Equal Employment Opportunity Officer to ensure its effectiveness.

B. The **Human Resources Assistant and Executive Director** act as Equal Employment Opportunity Officers and administer this Plan. Responsibilities include:

1. Monitoring the Organization policy statement regarding Equal Employment Opportunities to assure it is current and in compliance with the law.
2. Assisting in the identification of problem areas and their solutions.
3. Auditing personnel practices to ensure that all applicants and employees receive fair consideration for employment, promotions, training, reduction in force, rehires, pay and all other forms of compensation without discrimination.
4. Monitor advertising to ensure EEO tagline is included.
5. Designing, implementing, and monitoring the EEOC/Affirmative Action database to measure program effectiveness and to determine where progress has been made and where further action is needed.
6. Ensuring that the proper EEOC posters are displayed.
7. Investigating complaints concerning equal employment opportunities and reporting to the Executive Director for determination and action.
8. Keeping management informed of the latest developments in the equal opportunity area.
9. Ensuring the Plan is presented during both employee orientation and management training programs.

C. **Program managers and other supervisory personnel** responsibilities include:

1. Assisting in identifying problem areas.
2. Assisting in finding solutions to identified problems.
3. Monitoring hiring practices and ensuring every effort is being made to achieve organizational goals.
4. Ensuring that promotions as well as other personnel practices provide equal employment opportunities without discrimination.

Workforce and Utilization Analysis with Goals

A. External: Primary geographical area from which the Organization recruits is Forsyth County. Applicants from other counties are welcome.

B. Work Force Analysis: The workforce is carefully analyzed by listing each job ranked from lowest paid to highest paid within each program. Corresponding wage and/or salary data for each job by race and sex is reviewed to ensure there is no disparity in compensation for employees on equal or substantially equal jobs other than such commensurate with length of service variances.

Examination of Personnel Policies and Procedures to Identify Problem Areas

Personnel policies and procedures are reviewed and analyzed in light of applicable law and the Organization's Equal Employment Opportunity objectives. The following will receive specific attention:

A. The composition of the workforce is analyzed categorically by minority group status and sex. This information is provided annually to fund sources as part of reporting and application requirements.

B. The total employee selection processes, including application form, interview procedure, referral procedure and final selection process, will be analyzed.

C. The following actions have been taken:

1. Detailed job descriptions for each job title have been established and are reviewed periodically to ensure that the Organization identifies actual tasks performed and the importance of specific employee traits or skills needed for the job. Special attention is given to academic experience and skill requirements to ensure these requirements in and of themselves do not constitute inadvertent discrimination. Job specifications are consistent for the same job title in all departments and locations and are free from bias and discrimination.
2. Job descriptions are used by members of management and supervision who are involved in the recruiting, screening, selection, and promotion processes.
3. Applications have been reviewed to eliminate unnecessary items which may have a disproportionate impact on minorities and females.
4. Application forms are considered active for a period of one year. Subsequently, they will be retired into an inactive file for an additional period of one year to meet federal record keeping requirements.

5. Applicant flow is monitored to ensure that minorities and females are being considered for future job openings on an equal basis.
6. Interviewing procedures were reviewed to assure suitability of the applicant for the job in question. Applicant interviews are conducted typically by the Program Manager and the direct supervisor for the position. In some cases, departmental staff is also included in interviews. The Human Resources Assistant and Executive Director also participate to ensure legal employment hiring practices are followed.
7. Referral procedures used for filling employment requisitions are non-discriminatory. Members of management are aware of the Organization's EEO policy and have been instructed as to their individual responsibilities.
8. Personnel involved in recruiting, screening, selection, disciplinary and related processes are trained to ensure elimination of bias in personnel actions.
9. Applicants hired without previous or related work experience are placed in entry level positions.
10. Transfer and promotion practices have been reviewed and found that opportunities to prepare for promotion are equally available to employees. Openings in high-skilled jobs, when available, are filled without discrimination by promotion of highly-qualified employees from within the Organization whenever possible.
11. Organization facilities and other special programs such as educational assistance are available to employees on an equal basis.
13. On-the-job training is offered non-discriminately.
14. The Organization has a Grievance policy in place contained in the Policy Manual so that problems can be resolved as quickly as possible.
15. In an attempt to ensure that the attitude of employees toward equal employment opportunity is a positive one, the New Employee Orientation process serves to clarify the Organization's position regarding equal employment opportunities and helps to condition new employees to realize they are expected to abide by and further the policy of equal opportunity.
16. Equal Employment Opportunity posters are posted in conspicuous places where they can be viewed by applicants as well as employees.

Evaluation Procedures

The Organization will continue to evaluate its affirmative action by:

1. Making its commitment to equal employment opportunity known to area recruitment sources with special emphasis on minority and female applicants for other than entry level jobs.
2. Keeping management updated on problems and progress.
3. Keeping the Executive Director up-to-date on the progress of meeting the objectives of this Affirmative Action Plan.
4. Continuing to ensure avoidance of discriminatory problems relating to advancement of qualified minority and female employees by auditing Organization promotions and transfers.
5. Continue ongoing evaluation of position descriptions and compensation to assure they accurately reflect position functions and pay equity.
6. Continue to evaluate the selection process and train personnel involved in the selection process to ensure elimination of bias in all personnel actions.
7. Training will be conducted with management including all levels of supervision to discuss current status of laws and regulations relating to non-discrimination in employment in order to foster uniform understanding of the legal aspects of the Organization's equal employment opportunity policies.

Internal Auditing System

The Human Resources Assistant will report to the Executive Director periodically summarizing progress made in achieving objectives and set out any problem areas found to exist. The EEO Officer will monitor records of referral, placements, transfers, promotions, and terminations at all levels to ensure that the Organization's non-discrimination policy is carried out.

Affirmative Action Procedures

The Organization's Equal Employment Opportunity and Harassment policies ensure employment opportunities without discrimination on the basis of race, color, sex, national origin, religion, age, equal pay, disability, military status, and genetic information. Experiment In Self-Reliance, Inc. will continue its efforts to provide affirmative action consideration of minorities, females, disabled individuals, military service individuals, and persons not currently in the workforce who have the requisite skills.

Sex Non-discrimination:

1. Jobs, job practices, wages, benefits, hours, or other conditions of employment, training programs, etc. are available equally to males and females.
2. Appropriate physical facilities are available to both sexes.
3. There are no distinctions between married and unmarried individuals of one sex that are not made between married and unmarried individuals of the opposite sex.
4. Females with young children are afforded the same employment opportunities as males with young children.

Disabled individuals:

1. The Organization will take affirmative action to employ, advance in employment, and otherwise treat qualified disabled individuals without discrimination based upon their physical or mental disability in employment practices such as recruiting, hiring, placement, promotion, reduction in force, termination, compensation or selection for training.
2. The Organization will provide reasonable accommodations to the physical and mental limitations of known and qualified disabled employees and applicants based on business necessity, employee safety and health, and financial cost and expenses. The accommodations will necessarily be individualized in most instances so as not to constitute an undue hardship on business operations.
3. Compensation offered for a qualified disabled individual will not be reduced because such individual is receiving other disability income or benefits from other sources.

Family and Medical Leave:

The Organization's FMLA policy defines the qualifications and procedures for family and medical leave and sets out procedures for military caregivers and leave for qualifying exigencies applicable to military service such as active duty and National Guard duty.

Training and Career Development

Job orientation and training will be provided for each employee. The Agency will help employees work out a satisfactory work schedule in case courses are offered which conflict with the normal work hours. The agency will, within budget limitations, provide employees with training opportunities when it appears that such training would be beneficial. Registration fees will be paid by the agency for agency sponsored or approved training. Each employee will be provided appropriate training each program year. The training and opportunities for training will be administered on a non-discriminatory basis.

Drug Free Workplace

The Organization's Drug and Alcohol policy sets out a zero tolerance for the illegal use of controlled substances or drugs, or the misuse of legal drugs, and/or the use of alcohol while on duty. Therefore, the Organization is a drug free workplace. Employees are subject to random testing and those violating the policy will be terminated.

Immigration Reform and Control Act

The Organization will, where applicable, comply with the Immigration Reform and Control Act and will require prospective employees to produce documentation establishing their identity and their authorization or eligibility to work in the United States.

Please See Also: AAP Attachment 1, AAP Attachment 3, AAP Attachment 3, AAP Attachment 4

Addendum and Update for Fiscal Year 2014-2015

Through the course of the past year, there have been no significant changes to our staff. There has also been minimal salary movement.

Primary personnel changes have been on the Board of Directors. AAP Attachment 4 reflects the current board makeup due to board turnover as a result the expiration of terms for some board members. AAP 2, which shows the Board of Directors at this time last year, has been included for comparison purposes.

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, 2016 - June 30, 2017

SECTION II. CONTRACT SUMMARY

CSBG	Total Direct Costs	Total Indirect Costs	Admin. Support (CSBG Only)	Total Contract Amount
	\$754,956	\$139,717		\$894,673
TOTAL OEO CONTRACT AMOUNT				\$894,673

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	(Insert Program Name)	PROGRAM TOTALS	COUNTY TOTALS
Salaries & Wages	\$327,946		\$327,946	\$327,946
Fringe Benefits	\$110,209		\$110,209	\$110,209
Equipment				
Communication	\$7,795		\$7,795	\$7,795
Space Cost	\$15,493		\$15,493	\$15,493
Travel	\$14,176		\$14,176	\$14,176
Supplies/Materials	\$5,760		\$5,760	\$5,760
Contractual	\$16,815		\$16,815	\$16,815
Client Services	\$253,066		\$253,066	\$253,066
Other	\$3,696		\$3,696	\$3,696
Total Direct Costs	\$754,956		\$754,956	\$754,956
Indirect Costs				
Approved Rate: 42.6035%	\$139,717		\$139,717	
Base: Direct Salaries				
TOTALS	\$894,673		\$894,673	\$754,956

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)	Fringe Benefit Computation eg. Benefit Amount x No. of Months eg. Salary x benefit Amount/%	SELF-SUFFICIENCY Fringes	SELF-SUFFICIENCY Salary	(Insert Program Name) Fringes	(Insert Program Name) Salary
Director of Agency Operations	\$53,667	12	\$26,834	50.00%	Unemployment	\$22,300 x 1.47% = 328 x 50%	\$164	\$26,834		
					Health insurance	\$925 per mo. X 12 mos. = 11,100 x 50%	\$5,550			
					Retirement	\$53,667 x 6% = 3,220 x 50%	\$1,610			
					OASDI/MEDICARE	\$53,667 x 7.65% = 4,106 x 50%	\$2,053			
					Life/Disability insurance	\$34 per mo. X 12 mos. = 408 x 50%	\$204			
					workers compensation	\$53,667 x .39 = 209 x 50%	\$104			
Self-Sufficiency Services Manager	\$45,407	12	\$45,407	100.00%	Unemployment	\$22,300 x 1.47% = 328	\$328	\$45,407		
					Health insurance	\$800 per mo. X 12 mos.	\$9,600			
					Retirement	\$45,407 x 6%	\$2,724			
					OASDI/MEDICARE	\$45,407 x 7.65%	\$3,474			
					Life/Disability insurance	\$29 per mo. X 12 mos.	\$348			
					workers compensation	\$45,407 x .39	\$177			
Receptionist/Resource & Referral Agent	\$25,641	12	\$19,231	75.00%	Unemployment	\$22,300 x 1.47% = 328 x 75%	\$246	\$19,231		
					Health insurance	\$433 per mo. X 12 mos. = 5,196 x 75%	\$3,897			
					Retirement	\$25,641 x 6% = 1,538 x 75%	\$1,153			
					OASDI/MEDICARE	\$25,641 x 7.65% = 1,962 x 75%	\$1,471			
					Life/Disability insurance	\$17 per mo. X 12 mos. = 204 x 75%	\$153			
					workers compensation	\$25,641 x .39 = 100 x 75%	\$75			
Orientation/Eligibility Specialist	\$31,476	12	\$23,607	75.00%	Unemployment	\$22,300 x 1.47% = 328 x 75%	\$246	\$23,607		
					Health insurance	\$433 per mo. X 12 mos. = 5,196 x 75%	\$3,897			
					Retirement	\$31,476 x 6% = 1,889 x 75%	\$1,417			
					OASDI/MEDICARE	\$31,476 x 7.65% = 2,408 x 75%	\$1,806			
					Life/Disability insurance	\$24 mo. X 12 mos. = 288 x 75%	\$216			
					workers compensation	\$31,476 x .39 = 123 x 75%	\$92			
Outreach Service Coordinator	\$37,391	12	\$37,391	100.00%	Unemployment	\$22,300 x 1.47%	\$328	\$37,391		
					Health insurance	\$433 mo. X 12 mos.	\$5,196			
					Retirement	\$37,391 x 6%	\$2,243			
					OASDI/MEDICARE	\$37,391 x 7.65%	\$2,860			
					Life/Disability insurance	\$24 mo. X 12 mos.	\$288			
					workers compensation	\$37,391 x .39	\$146			
Outreach Service Coordinator	\$36,493	12	\$36,493	100.00%	Unemployment	\$22,300 x 1.47%	\$328	\$36,493		
					Health insurance	\$433 mo. X 12 mos.	\$5,196			
					Retirement	\$36,493 x 6%	\$2,190			
					OASDI/MEDICARE	\$36,493 x 7.65%	\$2,792			
					Life/Disability insurance	\$24 mo. X 12 mos.	\$288			
					workers compensation	\$36,493 x .39	\$142			
TOTAL FRINGES			\$63,002			\$63,002				
TOTAL SALARIES			\$188,962				\$188,963			
TOTAL FTE's				5.00						

SECTION IV. - SALARIES AND FRINGE BENEFITS

Position Title	Annual Salary & Wages	No. of Months	CSBG Salary	% CSBG Share FTE's	Fringe Type (Itemize)	Fringe Benefit Computation	SELF-SUFFICIENCY Fringes	SELF-SUFFICIENCY Salary	(Insert Program Name) Fringes	(Insert Program Name) Salary
						eg. Benefit Amount x No. of Months eg. Salary x benefit Amount/%				
Success Coach	\$32,420	12	\$32,420	100.00%	Unemployment	\$22,300 x 1.47%	\$328	\$32,420		
					Health insurance	\$433 mo. X 12 mos.	\$5,196			
					Retirement	\$32,420 x 6%	\$1,945			
					OASDI/Medicare	\$32,420 x 7.65%	\$2,480			
					Life/Disability insurance	\$22 mo. X 12 mos.	\$264			
Success Coach	\$33,678	12	\$33,678	100.00%	workers compensation	\$32,420 x .39	\$126	\$33,678		
					Unemployment	\$22,300 x 1.47%	\$328			
					Health insurance	\$433 mo. X 12 mos.	\$5,196			
					Retirement	\$33,678 x 6%	\$2,021			
					OASDI/Medicare	\$33,678 x 7.65%	\$2,576			
Executive and Program Assistant	\$47,874	12	\$19,150	40.00%	Life/Disability insurance	\$21 mo. X 12 mos.	\$252	\$19,150		
					workers compensation	\$33,678 x .39	\$131			
					Unemployment	\$22,300 x 1.47% = 328 x 40%	\$131			
					Health insurance	\$925 mo. X 12 mos. = 11,100 x 40%	\$4,440			
					Retirement	\$47,874 x 6% = 2872 x 40 %	\$1,149			
Administrative Assistant	\$37,591	12	\$28,193	75.00%	OASDI/Medicare	\$47,874 x 7.65% = 3662 x 40%	\$1,465			
					Life/Disability insurance	\$31 mo. X 12 mos. = 372 x 40%	\$149			
					workers compensation	\$47,874 x .39 = 187 x 40%	\$75			
					Unemployment	\$22,300 x 1.47% = 328 x 75%	\$246			
					Health insurance	\$433 mo. X 12 mos. = 5196 x 75%	\$3,897			
Development and Agency Relations Manager	\$42,569	12	\$8,514	20.00%	Retirement	\$37,591 x 6% = 2255 x 75%	\$1,691			
					OASDI/Medicare	\$37,591 x 7.65% = 2876 x 75%	\$2,157			
					Life/Disability insurance	\$24 mo. X 12 mos. = 288 x 75%	\$216			
					workers compensation	\$37,591 x .39 = 147 x 75%	\$110			
					Unemployment	\$22,300 x 1.47% = 328 x 20%	\$66			
Technical Support Associate	\$42,569	12	\$17,028	40.00%	Health insurance	\$925 mo. X 12 mos. = 11,100 x 20%	\$2,220			
					Retirement	\$42,569 x 6% = 2554 x 20%	\$511			
					OASDI/Medicare	\$42,569 x 7.65% = 3257 x 20%	\$651			
					Life/Disability insurance	\$27 mo. X 12 mos. = 324 x 20%	\$65			
					workers compensation	\$42,569 x .39 = 166 x 20%	\$33			
					Unemployment	\$22,300 x 1.47% = 328 x 40%	\$131			
					Health insurance	\$925 mo. X 12 mos. = 11,100 x 40%	\$4,440			
					Retirement	\$42,569 x 6% = 2554 x 40%	\$1,022			
					OASDI/Medicare	\$42,569 x 7.65% = 3257 x 40%	\$1,303			
					Life/Disability insurance	\$27 mo. X 12 mos. = 324 x 40%	\$130			
					workers compensation	\$42,569 x .39 = 166 x 40%	\$66			
	TOTAL FRINGES		\$47,207			\$47,207				
	TOTAL SALARIES		\$138,982				\$138,983			
	TOTAL FTE's			3.75						

EXPERIMENT IN SELF-RELIANCE, INC.

SECTION IVa. - BUDGET SUPPORT DATA

COST CATEGORY				SELF-SUFFICIENCY	(Insert Program Name)	TOTAL
EQUIPMENT						
	Description	Quantity	Unit Price			
TOTAL EQUIPMENT						
COMMUNICATIONS						
	Postage 125 pieces avg./mo. X .485 x 12 mos.			\$727		\$727
	\$67.31 mo. X 8.75 extensions = 588.96 mo. X 12 mos.			\$7,068		\$7,068
TOTAL COMMUNICATIONS				\$7,795		\$7,795

SECTION IVb - BUDGET SUPPORT DATA

COST CATEGORY		SELF-SUFFICIENCY	(Insert Program Name)	TOTAL
SPACE COST				
3480 Dominion Street depreciation \$9,071 mo. X 12 mos. X 12.08%		\$13,149		\$13,149
water/sewer \$256 mo. X 12 mos. X 12.08%		\$371		\$371
electricity \$1,128 mo. X 12 mos. X 12.08%		\$1,635		\$1,635
pest control \$85 mo. X 12 mos. X 12.08%		\$123		\$123
Trash collection \$73 mo. X 12 mos. X 12.08%		\$106		\$106
Fire and security monitoring \$75 mo. X 12 mos. X 12.08%		\$109		\$109
TOTAL SPACE COSTS		\$15,493		\$15,493
TRAVEL				
Lodging average \$106 per day x 4 days x 8 staff NCCAA conference		\$3,392		\$3,392
Conference registration \$375 x 8 staff NCCAA conference		\$3,000		\$3,000
Lodging average \$106 per day x 3 days x 8 staff OEO Contractor's training		\$2,544		\$2,544
Meals average \$56.75 per day x 4 days x 8 staff NCCAA conference		\$1,816		\$1,816
Meals average \$56.75 per day x 1 days x 8 staff OEO Contractor's training, (meals incl.)		\$454		\$454
Mileage 1100 miles average x 5 staff x .54		\$2,970		\$2,970
TOTAL TRAVEL		\$14,176		\$14,176
SUPPLIES/MATERIALS				
Office and computer supplies (pens, paper, folders, clips, pads, calendars, planners, etc.)				
\$400 mo. Avg. x 12 mos.		\$4,800		\$4,800
Janitorial supplies (paper towels, tissue, etc.) \$80 mo. Avg. x 12 mos.		\$960		\$960
TOTAL SUPPLIES/MATERIALS		\$5,760		\$5,760

EXPERIMENT IN SELF-RELIANCE, INC.

SECTION IVc. - BUDGET SUPPORT DATA

COST CATEGORY		SELF-SUFFICIENCY	(Insert Program Name)	TOTAL
CONTRACTUAL				
Audit (Per Cost Allocation Plan) Preston Sims & Darden P.A. \$651.67 mo. X 12 mos.		\$7,820		\$7,820
Other (specify)				
AR4CA Master subscription agreement \$433.33 mo. X 12 mos.		\$5,200		\$5,200
SAVIN copier lease \$365 mo. X 12 mos. X 37%		\$1,621		\$1,621
Cleaning service for 3480 Dominion Street D&K Fresh Start Janitorial Service				
\$1,500 mo. X 12 mos. X 12.08%		\$2,174		\$2,174
		\$16,815		\$16,815

EXPERIMENT IN SELF-RELIANCE, INC.

SECTION IVd. - BUDGET SUPPORT DATA

COST CATEGORY		SELF-SUFFICIENCY	(Insert Program Name)	TOTAL
CLIENT SERVICES				
Keytrain Site License (system for workforce readiness)		\$4,500		\$4,500
Financial Pathways of Pied. Credit Counseling Sessions (one-on-one) \$160 x 100 clients		\$16,000		\$16,000
Credit and Debt Management Assistance (Housing, Utilities, Medical) 12 clients @ \$2,500		\$30,000		\$30,000
Financial Path. Financial Literacy training \$375 per mo. x 7 months (2 classes per month)		\$2,625		\$2,625
Rent \$621.16 mo. Avg. x 100 clients		\$62,116		\$62,116
Utilities \$300 mo. Avg. x 100 clients		\$30,000		\$30,000
Transportation (car repairs) \$800 avg. x 15 clients		\$12,000		\$12,000
Truck Driver Training \$2,745 x 10 clients		\$27,450		\$27,450
Tuition/fees (WSSU, FTCC, Mt. Eagle, etc.) \$1,500 x 25		\$37,500		\$37,500
Testing Fees for Licenses (RN, etc.) \$275 avg. x 15 clients		\$4,125		\$4,125
Textbooks, class supplies \$400 avg. x 25 clients		\$10,000		\$10,000
Work related supplies (shoes, uniforms, tools, etc.) \$275 avg. x 10 clients		\$2,750		\$2,750
Childcare \$350 avg. x 10 clients x 4 mos.		\$14,000		\$14,000
TOTAL CLIENT SERVICES		\$253,066		\$253,066
OTHER (specify)				
Property and general liability insurance 3480 Dominion Street				
\$778 mo. X 12 mos. X 12.08%		\$1,128		\$1,128
NCCAA agency membership \$214 mo. X 12 mos.		\$2,568		\$2,568
TOTAL OTHER		\$3,696		\$3,696

COUNTY BUDGET

FISCAL YEAR

July 1, 2016 - June 30, 2017

AGENCY EXPERIMENT IN SELF-RELIANCE, INC.

	COUNTY NAME(S)										TOTAL
	FORSYTH	(County)	(County)	(County)	(County)	(County)	(County)	(County)	(County)	(County)	
Per County Allocation	\$894,673										
Expense Categories											
Salaries & Wages	\$327,946										\$327,946
Fringe Benefits	\$110,209										\$110,209
Equipment											
Communication	\$7,795										\$7,795
Space Costs	\$15,493										\$15,493
Travel	\$14,176										\$14,176
Supplies/Materials	\$5,760										\$5,760
Contractual	\$16,815										\$16,815
Client Services	\$253,066										\$253,066
Other	\$3,696										\$3,696
Total Direct Costs	\$754,956										\$754,956
Indirect Costs	\$139,717										\$139,717
Admin Support (CSBG only)											
Total Costs	\$894,673										\$894,673

TOTAL AGENCY BUDGET

FISCAL YEAR July 1, 2016 - June 30, 2017

AGENCY EXPERIMENT IN SELF-RELIANCE, INC.

Please check one

INDIRECT COST BASE:	Total Direct Costs	x	Salaries/Wages	Salaries/Fringes
INDIRECT COST RATE:	42.6%			

OBJECT CATEGORIES	PROGRAM NAMES										TOTAL
	CSBG	UNITED WAY	HOUSING SERVICES	INDIVIDUAL DEVELOPMENT ACCOUNT	VITA/EITC	LOCAL	(Insert Program Name)	(Insert Program Name)	(Insert Program Name)	(Insert Program Name)	
Salaries & Wages	\$327,946	\$170,300	\$180,024	\$84,266	\$90,449	\$19,760					\$872,745
Fringe Benefits	\$110,209	\$65,313	\$84,270	\$29,161	\$20,049						\$309,002
Equipment											
Communication	\$7,795	\$2,650	\$6,900	\$2,400	\$2,100						\$21,845
Space Cost	\$15,493	\$7,667	\$38,808	\$1,423	\$631	\$20,000					\$84,022
Travel	\$14,176	\$750	\$5,450	\$1,250	\$800						\$22,426
Supplies/Materials	\$5,760	\$2,800	\$6,600	\$5,000	\$3,790	\$455					\$24,405
Contractual	\$16,815	\$3,000	\$4,500	\$4,500		\$992					\$29,807
Client Services	\$253,066			\$10,000							\$263,066
Other	\$3,696	\$1,000	\$9,000	\$2,000	\$2,750						\$18,446
Total Direct Costs	\$754,956	\$253,480	\$335,552	\$140,000	\$120,569	\$41,207					\$1,645,764
Indirect Costs	\$139,717	\$72,554	\$76,697	\$35,900	\$38,534	\$8,418					\$371,820
Admin Support (CSBG only)											
Total Costs	\$894,673	\$326,034	\$412,249	\$175,900	\$159,103	\$49,625					\$2,017,584

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

OEO/TAB
Revised: 11/18/15

OBJECT CATEGORY	TOTALS
Salaries & Wages	\$872,745
Fringe Benefits	\$309,002
Equipment	
Communications	\$21,845
Space Costs	\$84,022
Travel	\$22,426
Supplies/Materials	\$24,405
Other Contractual	\$29,807
Client Services	\$263,066
Other	\$18,446
Total Direct Costs	\$1,645,764
Indirect Costs	\$371,820
Admin Support (CSBG only)	
Agency Totals	\$2,017,584

