

A. Organization & Contact Information

Case Id: 10605
Name: Old Salem - 2020 - 2020/21
Address: *No Address Assigned

Completed by sbrittain@oldsalem.org on 11/22/2019 1:37 PM

A. Organization & Contact Information

The Request for Proposals and additional materials to assist with completing the application can be found on the City's webpage for [Community Agencies](#)

A.1. Organization Name

Old Salem, Inc.

A.2. Project/Program

Operating Support

A.3. FY 2020-21 Funding Request Amount

\$300,000.00

A.4. Agency's Total Operating Budget

\$5,932,286.00

A.5. Mailing Address

600 South Main Street Winston-Salem, NC 27101

A.6. Project/Program Location Address

600 South Main Street Winston-Salem, NC 27101

A.7. Organization Website

www.oldsalem.org

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

1950

A.9. Organization Fiscal Year

January 1 - December 31

A.10. Federal Tax ID Number

A.11. Federal DUNS Number

EXECUTIVE DIRECTOR/MANAGER

A.12. Name, Title

Franklin Vagnone

A.13. Email

fvagnone@oldsalem.org

A.14. Phone

(336) 721-7346

CONTACT

A.15. Name, Title

Susan Brittain, Coordinator of Grants

A.16. Email

sbrittain@oldsalem.org

A.17. Phone

(336) 721-7322

BOARD CHAIR

A.18. Name

Hayes Wauford

A.19. Term Expiration

12/31/2020

A.20. Email

hayes@wilsoncovington.com

A.21. Phone

(336) 399-9198

B. Project Overview

Completed by sbrittain@oldsalem.org on 11/22/2019 1:38 PM

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B. Project Overview

Please provide the following information

APPROACH (7 POINTS)

B.1. Provide a concise description of the proposed project/program, indicating specifically how City funds will be used. Briefly, what are the goals/objectives of the project/program?

A grant from the city would be used toward our overall operating budget, not to any specific project, program or particular line item(s). The proposed project is the support of general operations, which supports

- 1) educational programming
- 2) community collaborations and outreach
- 3) staffing
- 4) preservation and maintenance of buildings, grounds, and infrastructure
- 5) conservation, exhibition and maintenance of collections of southern and Moravian material culture.

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

As a living history museum, Old Salem is accessible by the public about 300 days per year, excluding Mondays, holidays, and closures for inclement weather. The best way to access and experience Old Salem is by visiting the historic district. We welcome public visitation through engagement in educational and cultural programs; interpreted and self-guided tours in our historic buildings and landscapes; tours of our galleries and collections of southern and Moravian material culture; and, special events.

Old Salem Museums & Gardens attracts over 440,000 visitors annually, including over 45,000 school children with over 200,000 attending ticketed or program-related events. Recent Visit Winston-Salem research reveals that the majority of visitors to Old Salem come because of the History. This tourism has an estimated \$48 million annual impact on the local economy. Old Salem attracts visitors from over 20 countries worldwide, all 50 states in the US, and most of North Carolina's counties. All of these have helped Old Salem be voted the top attraction in Winston-Salem by Trip Advisor, be recognized as the best museum in Forsyth County by the readers of YES! Weekly, and be named #1 Best Attraction in North Carolina by AAA Go Magazine readers.

Old Salem is making a concerted effort to address barriers to the access and enjoyment of the museum and its offerings. This year we conducted an Access Saturday for persons with disabilities, their families and caregivers. The goal was to receive feedback from visitors of all ages on needed changes and responses to actual physical access limitations for persons in Winston-Salem with cognitive impairments, autism, sensory limitations, and language processing abilities. Gramercy Research Group conducted the evaluation. The long-term goal of our access initiative is to transform the Old Salem experience into one that deeply engages our visitors no matter the physical or cognitive challenges. These experiences will take into consideration our everyday interpretation as well as special programming and community events.

In addition to enjoying Old Salem through onsite visits, individuals may participate in Old Salem events through our

offsite educational and cultural programming opportunities. These programs and events are frequently held in collaboration with other organizations, within the community, around the state, regionally (particularly in the southeastern U.S.), and throughout the country.

Scholars, historians, collectors, and the general public may also take advantage of our vast collections of Southern and Moravian decorative arts and material culture by accessing our records and holdings in the Anne P. and Thomas A Gray Library and MESDA Research Center, free-of-charge. These bring attention to our city, and Old Salem and help establish Old Salem as the #1 tourist destination in the city.

Lastly, visitors and the community can access information about Old Salem's services, programs, activities, classes, tours, accessibility and more by browsing its easily navigated website, through social media like Facebook and Twitter, by becoming a member (thereby receiving regular email communications), or by contacting Old Salem via telephone (including a toll-free number).

B.3. How many participants on average will be served at any one time? What is the maximum number that can be served at any one time? What is the unduplicated total number of participants to be served during the program year?

Daily attendance at Old Salem Museums & Gardens averages 660, which includes ticket holders, special events participants, Cobblestone Market attendees and vendors, and external event attendees. This number is based on annual admissions and event attendance of 440,000 (2018); an additional 200,000+ people are estimated to enjoy Old Salem free-of-charge as a public green space and retail destination each year.

The largest crowds are experienced during Community Days when free admission is offered or at special events, particularly Trick-or-Treating. This year, Trick-or-Treating drew an estimated 10,000 visitors. On weekdays when Old Salem is a destination for school groups, Old Salem may welcome up to 1,000+ visitors a day.

The un-duplicated total number of participants for 2018 was 187,239. This figure excludes Cobblestone Farmer's Market most of which are repeat customers and Old Salem/MESDA members who, we hope, make return visits throughout the year.

NEED (7 POINTS)

B.4. Describe the population(s) to be served. Describe the key demographic and economic characteristics of the clients to be served.

The populations to be served are local, statewide, regional, national, international, school children and school groups. Our populations include all ages, races, genders and, now, persons with disabilities. Of the 440,000 visitors who come to Old Salem annually, around 45,000 are school children.

Old Salem does not track the economic characteristics of our visitors. However, Old Salem strives to make its programs more accessible to low-income populations by:

- * Providing discount tickets, and the ability to walk the district as a self-guided tour.
- * Offering free Trick - or - Treating to all sectors of the community which always draws a diverse crowd.
- * Offering admission discounts to students and the military.
- * Participating in the Blue Star Museums program, which offers free admission to military personnel and their families from Memorial Day to Labor Day.
- * Seeking underwriting or corporate sponsorships.

B.5. Describe the unmet need that the proposed project/program seeks to address. Why does the population

described above need the proposed assistance? Include data supporting the need.

Old Salem occupies a critical and necessary role in Winston-Salem as a primary tourist destination, an educational experience and a recreational green space. It is the tangible connection to Winston-Salem's beginnings, the city's unique character, and identity and the values that have come to be associated with much of our community. Old Salem attracts visitors from over 20 countries worldwide, all 50 states in the US, and nearly every county in North Carolina.

Old Salem, mindful of its responsibilities as an economic driver and community asset, continually monitors its budget, not only to maintain its own financial sustainability but also to contribute to the prosperity of the community. Ours is an expensive enterprise, however, and historic properties, public facilities, and infrastructure are costly to maintain. The city's support is critical to Old Salem's ability to meet our financial challenges and to be able to continue offering exceptional, dynamic programming and accessible public spaces and facilities for our visitors and community residents.

COLLABORATION (6 POINTS)

B.6. Describe any specific collaborative relationships with other organizations (public or private) and how they will impact the project/program. How will collaboration contribute to the planning, implementation, operation, oversight, and performance measurement of the proposed project/program?

In its role as a community leader and economic development driver, Old Salem believes strongly in the collaborative process. Partnerships advance our educational mission, build and promote awareness of our opportunities and offerings, strengthen our brand, marshal or pool additional financial and human resources for greater efficiency and impact, and help broaden and diversify the scope of events, activities, and programs we can offer.

Collaborations so far in 2019 include:

Hidden Town Project

- * Afro-American Historical and Genealogical Society - Facilitated/hosted their 2019 Black History Month Genealogy Conference at Old Salem on February 2nd (attendance 204).
- * Southern Garden History Society and Wake Forest University - Planning/facilitating September 26 - 28 Landscape Conference, "Landscape, Race, and Culture: Shaping a World of Color in the American South." (sold out)
- * "Sounds of Hidden Town" collaboration with Winston-Salem State University and the University of North Carolina School of the Arts to create auditory sound compositions referencing and utilizing both the suppressed traditional West African spiritual music and behavioral traditions of the enslaved, combined and/or contrasted with the traditional German Moravian spiritual music traditions.
- * " Out of Bounds" - We are collaborating with contemporary artists and performers to paint an image of Salem today, in relation to Salem as it was historically. This year's Fellows are King Nobuyoshi Godwin, a painter and sculptor who works responds to the arts being on the autism spectrum was a form of synesthesia; and, Nico Amortegui, a Columbian immigrant who will be working with our master potters in creating and decorating pottery pieces that are produced in our public potter workshop. We also have two local artists, Leo Rucker, an artist, and Jacinta White, a poet.

Learning in Place

- * Partnered with Winston-Salem/Forsyth County Schools on professional development workshops for their social studies teachers in grades 2 - 12.
- * Continued our collaboration with Salem College on aligning our school tour curriculum with the NC Department of Public Instruction's Essential Standards.

Access Salem

Twenty local disability organizations collaborated this year to produce Access Saturday, a day for persons with

disabilities, their families, and caregivers to provide feedback on accessibility--what's working and what's not working--in the historic district. The organizations included

- * I Can House
- * GreenTree Peer Center
- * Kernersville Mayor's Council for People w/ Disabilities
- * Goodwill Industries
- * Daymark Recovery Services
- * Vocational Rehabilitation
- * Special Olympics Forsyth County
- * NC Assistive Technology
- * NC Division of the Deaf and Hard of Hearing
- * Tracy's Little Red Schoolhouse
- * NC Brain Injury Association
- * Senior Services
- * Cardinal Health Innovations (Monarch Choices @ the Ridge)
- * Monarch Behavioral Health
- * NC Stroke Association
- * Downs Syndrome Association of Greater W-S
- * WS Mayor's Council for Persons w Disabilities
- * IFB Solutions
- * Centers for Exceptional Children
- * The Adaptables
- * The Enrichment Center
- * ABC of NC Child Development Ctr.
- * Horizon's Residential

Other collaborations include REMPART, A French preservationist organization that is helping us with the preservation of the Shultz Shoe Shop and a program partnership with the NC Department of Natural and Cultural Resources.

C. Strategy and Performance

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C. Strategy and Performance

Please provide the following information

STRATEGY (5 POINTS)

C.1. The City of Winston-Salem adopted the [2017-2021 Strategic Plan \(2019 Update\)](#) as a guiding document to establish community priorities based on the vision, mission, and values set forward by the Mayor and City Council.

Indicate which of the City's strategic focus areas your program aligns with best (select one):

Economic Vitality and Diversity

C.2. Select the service area(s) that your project/program relates to:

- Housing/Homelessness
- Economic Development
- Construction Rehabilitation
- Poverty Reduction
- Arts and Culture
- Youth
- Public Safety
- Transportation
- Other

PERFORMANCE (15 POINTS)

C.3. Explain the plan for monitoring and evaluating the project/program. Also include the steps that will be taken if original goals provided in C.5. are not achieved.

Old Salem measures the effectiveness of its programs and operations in several ways:

Budget: Financial and business operations are measured by our ability to accurately project revenues, contain expenses and manage risks. We are working to eliminate our operating deficit and reduce our endowment draw without sacrificing our high-level programming. Areas of income include:

* Fundraising: Fundraising is an important revenue stream for Old Salem. Successful fundraising is measured by the Development team's ability to meet its operational (unrestricted) budgetary goal at the end of the fiscal year in the areas of memberships, grants, corporate sponsorships and annual income derived from individuals, organizations, and businesses.

* Retail: Customer satisfaction is monitored in our retail operations by the movement of products and sales figures,

including bakery items. Our retail and museum management software has enabled us to generate sales reports more efficiently, improve customer service, sell memberships, update customer records and input feedback immediately at points-of-sale. Our measurable goal is to increase retail net contributions to the museum's revenues each year. Retail sales are analyzed weekly, and adjustments are made accordingly.

* Admissions/Classes - The third area of income are tickets, tours, events, and classes. Weekly, monthly, quarterly and annual reports help us to monitor this revenue stream. Admissions and tours are often dependent on external conditions as varied as the weather, gas prices and financial ability (especially in the case of school groups). Adjustments in pricing, promotions and marketing, and the variety of programming help us to achieve our goals.

Our effectiveness in providing high-quality programming is also measured through the use of customer surveys, teacher evaluations, anecdotal information, and comments from onsite and online visitors. We routinely measure activity and solicit comments on our website (1.32 million hits annually) and on social media sites such as Facebook (24,127 followers, representing 47 countries and translated into 50 languages), Instagram (6,717 followers), and Twitter (2,091 followers).

C.4. Describe the system to be used to track participant and program data. List any key reports and their frequency that will be used to capture project/program performance.

Old Salem's primary revenue streams for general operating support are ticket admissions and classes, retail, endowment income and donations from individuals, corporations, foundations, and government agencies. Data collected includes, but are not limited to:

- * ticket sales from daily admissions and tour groups;
- * memberships, new and renewed;
- * grants;
- * annual and unrestricted donations; and
- * retail sales.

Old Salem utilizes a number of reports and measures to evaluate and strategically plan its annual operations, including but not limited to:

- * Retail sales (daily)
- * Budget (weekly)
- * Fundraising and membership goals (daily, weekly and monthly)
- * Admissions reports (daily)
- * Surveys and public opinion polls (periodic)
- * Anecdotal information (ongoing)

This data is shared quarterly in the "President's Update" to the board, advisory councils, staff, etc. (Please see attached).

C.5. Use the chart below to show how your agency measures program effectiveness. List goals, activities, and performance measures you will use to evaluate services, facilities, and programs that will be funded by the City. Performance measures can be quantitative and/or narrative.

- Include at least three goals and performance measures.

- One of the performance measures must include the unduplicated number of participants served.

Stated Program Goals	Program Activities in Support of Goals	FY 18-19 Previous Year Results	FY 19-20 Current Year Projected	FY 20-21 Next Year Anticipated Results
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			Results	
Economic Development: Contribute to the city's economic vitality.	Increase annual totals of social media engagements to attract visitors Increase room night stays by attracting visitors from outside Winston-Salem.	22,000 FB (8%) 537,000 Website (5%) 45,000 E-mail (8%) 15,054 room nights	22,000 FB (same as previous year) 537,000 Website (same as previous year) 45,000 E-mail (same as previous year) 15,100 room nights	22,000 FB (same as current year) 537,000 Website (same as current year) 45,000 E-mail (same as current year) 15,125 room nights
Financial Sustainability: Plan for the future sustainability of the museum.	Reduce net deficit (before endowment draws). Reduce expenses	(1,804,700) Reduced 10%	(\$1,604,700) Reduced 3%	(\$1,508,294) Increased 3%
Learning in Place Initiative: Enhance educational opportunities and collaborations with schools, colleges and universities	Build partnerships with higher education institutions to enhance our core initiatives.	Developed partnership with Appalachian State and the Academy at Middle Fork	Develop partnership with Diggs-Latham Elementary Offer K - 5 teachers from the WSFCS a Hidden Town Professional Development Seminar	Create a Teacher Institute in concert with Salem College Offer classes taught within the historic setting for the North Carolina Teachers of Mathematics 2020 State Conference
"Equity" Initiative: Increase diversity and cultural equity of audiences, staff and board.	Increase board minority representation and staff diversity. Increase staff salaries to a living wage.	0% minority board representation; 11% staff diversity Educational staff went from a base rate of \$8.00 to \$10.95 for secondaries and part-time employee, and \$12.95 for leads who were full time.	1% minority board representation; 12% staff diversity Beginning of 2019 all retail, maintenance and other department workers went from a base rate of \$8.00 to \$9.75 an hour.	2% minority board representation; 13% staff diversity 1.6% cost of living raise
"Hidden Town Initiative: Build research and programs about	Develop special projects and programming and the formation of	Collaborations created, including Salem College, Wake Forest University,	Research over 20 Salem lots, Introduce biographical text plans, Present The	"Across the Creek" exhibit, descendants gathering, Teachers' Institutes with

enslaved and freed African and African American experience in Salem.	collaborations to expand our perspectives and engage new audiences.	Triad Cultural Arts, Afro-American Historical and Genealogical Society, Middle Tennessee State University, NC State University	Sounds of Hidden Town at the Royal Academy of Music in London Continue to build collaborations	WSFCS and Salem College Premiere "Sounds of Hidden Town" in Winston-Salem.
"Access Salem" Initiative: Enhance accessibility of museum sites for greater participation by visitors.	Make buildings more accessible to physically challenged visitors	15 sites accessible	Hold free "Access Saturday" to gain insights from persons with disabilities about what is and isn't working for them in Old Salem around accessibility Evaluate insights	Begin implementing accessibility recommendations from evaluation. Host Access Saturday for Winston-Salem State University's Occupational Therapy programs.

C.6. FY 18-19 Program Accomplishments

- Economic Development: Moved Winkler Bakery Annex and Distribution Center to Marketplace Mall in 2018 to create a walk-up/destination retail presence other than the historic district, expand bakery operations and increased profitability. Old Salem’s presence is anticipated to increase mall traffic and activity.
- “Activate Main Street” Initiative: Engaged visitors more actively by developing a new orientation process and path for all school groups to assure a strong understanding of the fundamental elements of the heritage site; creating a new visitor map that includes accessibility information; moving the Tours Office to the Visitor Center for greater visibility and direct service; introducing more detailed signage and way-finding elements throughout the district following a 9-month process with Forsyth County Historic Resources Commission; utilizing more costumed staff in the streets and in venues on high volume days; adding benches; and creating more immersive activities in all venues.
- "Learning in Place" Initiative: Restored the Boys’ School and opened it as a newly interpreted building with engaging interactives for all ages in April 2018. The addition of public restrooms on this site serves the north end of the historic district.
- Community Service: Provided daily maintenance and repairs to infrastructure and facilities—sidewalks, trees, lighting, signage, parking areas, landscapes, leaf and snow removal, and restrooms—in the historic district.
- "Hidden Town" Initiative: Grew the Hidden Town story and began to establish sites within the historic district where enslaved and free Africans and African Americans lived and worked, based on research in Moravian Archives. Conducted sensitivity training with staff.
- "Access Salem" Initiative: Added bags or boxes of tactile objects specific to each building’s interpretations to engage visitors, particularly young children and visitors with physical, cognitive and emotional challenges and accessibility issues. Appalachian State University (Special Needs Education) assessed and reported on accessibility issues. As a result of efforts to increase accessibility, Old Salem Museums & Gardens was awarded the 2018 Community Access Award by the Mayor's Council for People with Disabilities.

C.7. FY 20-21 Key Objectives

"Learning in Place" Initiative:

- Grade levels 1 and 2 at the ASU Academy at Middle Fork will be here for our Footsteps tours, while 3rd and 4th graders will be experiencing Hands-on Tours.
- Provide Footsteps tours for the 4th graders at Diggs-Latham Elementary School, a Title 1 school within the WSFCS.

- WSFCS Career Technical Education (CTE) classes (Reagan High School) will be visiting Old Salem for a special hands-on tour that is focused on apparel, foods, and interior design. This is a pilot program that we have created in partnership with WSFCS. We will offer the same experience to Mount Tabor CTE classes.
- The North Carolina Council for Teachers of Mathematics (NCCTM) has asked Old Salem and Salem College to offer classes taught within the historic setting as part of their 2020 State Conference. We have been working with NCCTM and Salem to develop a menu of offerings - math classes taught from a historical perspective.

"Hidden Town" Initiative: Produce Hidden Town "Across the Creek" exhibit; descendants gathering; and, Teachers' Institutes with WSFC Schools and Salem College.

"Access Salem" Initiative: Begin implementing evaluation recommendations from 2019 Access Saturday results.

D. Organizational Capacity

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D. Organizational Capacity

Please provide the following information

MISSION (5 POINTS)

D.1. Provide an overview of the organization. Include the organization's mission statement and the major services, programs, and activities provided. How does the proposed project/program help advance the mission of your organization?

Our Mission: Old Salem Museums & Gardens presents an authentic view of the rich cultural history of early Southern life to diverse audiences—with special emphasis on the Moravians in North Carolina—through the preservation and interpretation of historic objects, buildings, and landscapes.

Old Salem, Inc. (dba Old Salem Museums & Gardens) is a living history site incorporated in 1950 to tell the story of early settlers living in and around Salem, a Moravian town founded in the NC backcountry in 1766. Old Salem is comprised of the Historic Town of Salem, the Museum of Early Southern Decorative Arts (MESDA), the Gardens of Old Salem and Old Salem business enterprises, including Winkler Bakery. Recognized as a National Historic Landmark and accredited by the American Association of Museums, Old Salem attract more than 440,000 visitors annually.

Old Salem's major services, programs, and activities are:

- * educational programs, including costumed interpretation, experiential tours, classes, and workshops;
- * diverse cultural and artistic programming for enjoyment by the community, as well as our visitors;
- business operations and tourism that contribute to the local economy;
- * historic preservation and maintenance of original buildings and landscapes, authentic reconstructions, and municipal infrastructure;
- * nationally-recognized research, collections, and exhibitions of Moravian and southern material culture.

Old Salem is now actively engaged in new initiatives that will:

- expand Old Salem's story, build diversity and foster inclusivity among its audiences and staff, especially through the introduction of "Hidden Town," a program that will integrate the narrative of enslaved and free Africans and African Americans living in Salem into interpretation throughout the historic district;
- promote more interactive, hands-on engagement with visitors and the public through immersive interpretive experiences and through community activities;
- create better access to our site and offerings for our physically, cognitively, and emotionally challenged visitors;
- enliven the historic district experience, expand the number of tour stops and venues, and make wayfinding easier with our "Activate Main Street" campaign.
- draw greater relevance between our historic programs and contemporary life; and
- develop programming that places Old Salem at the forefront of national discussions, not only on the future of historic museums and sites but also significant social issues.

These initiatives—which are already propelling Old Salem into international circles that examine the future roles and programs of historic museum sites—will highlight the transformative and progressive nature of Old Salem and the City of Winston-Salem. A grant of \$300,000 from the City of Winston-Salem will assist us in implementing these initiatives successfully.

FUNCTION (5 POINTS)

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

69 years

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

ECONOMIC VITALITY: Considered one of the most innovative heritage sites in the U.S., Old Salem supports the economic vitality of Winston-Salem through:

Travel and Tourism

- o Attracts 440,000 visitors annually, including 45,000 school children. Many of our visitors enjoy other amenities (hotels, restaurants, museums, art galleries, athletic events, concerts) offered by the city’s businesses and organizations.
- o It generates an annual estimated economic impact of \$48 million.
- o Accounts for an estimated 15,000 room nights, producing an estimated \$3 million in income for city businesses.
- o Generates \$3.34 million in tax revenues for the state and county, and supports over 140 FTE jobs.
- o Brings convention and conference activity (and dollars) to the city.
- o Develops promotional strategies that foster tourism to Old Salem and the city of Winston-Salem.

Downtown Revitalization: Old Salem serves as a catalyst for current and future real estate development in and around the Southeast Gateway and downtown Winston-Salem, attracting high profile residential and commercial projects to the area.

LIVEABLE NEIGHBORHOODS: In addition to its contributions as an economic driver in Winston-Salem and Forsyth County, Old Salem contributes to the quality of life and sustainability of the community in a number of ways.

- * Improves the Character and Condition of Neighborhoods
- * Old Salem’s presence in the community plays an important and positive role in stabilizing real estate values in the historic district and nearby neighborhoods like Washington Park and West Salem.

Economic Accessibility: Old Salem will continue to host free community events in the historic district (i.e., Halloween trick-or-treating and Black History Month observances, and will conduct educational lectures and seminars and special presentations throughout the community (i.e., garden club talks) to bring diverse audiences together and to celebrate our community.

STRUCTURE (5 POINTS)

D.4. In the chart below, list key personnel involved in the proposed project/program.

Position Title	Activities/Inputs	Total Work Hours Per Week	% of hours proposed to be funded
President and CEO	* Plans and/or coordinates Old Salem's program through board, staff and volunteers.	40	0.00 %

	<ul style="list-style-type: none"> * Oversees innovative interpretive and educational programs that support the mission. * Develops strategies to translate the goals and objectives into action. 		
Interim Chief Operations Officer	<ul style="list-style-type: none"> * Administers the financial affairs for all departments and funds of Old Salem Inc. * Manages the operations of the accounting office. * Oversees the information technology functions of the business. 	40	0.00 %
Chief Curator	* Responsible for the overall operation and supervision of the collections department, including curatorial, research, programming and publications functions, consistent with Old Salem's strategic plan.	40	0.00 %
Director of Education	<ul style="list-style-type: none"> * Develops, enhances and/or expands current interpretive programs and educational exhibits. * Monitors and evaluates the Education department's operations, staff and programs to elicit exceptional visitor experiences. 	40	0.00 %

D.5. List all executive staff and their compensation (other than per diem).

Executive Staff Name	Title/Role	Compensation	% of Hours Proposed to be Funded
Frank Vagnone	President & CEO	\$175,000.00	0.00 %
Terry Taylor	Interim Chief Operations Officer	\$75,000.00	0.00 %
Robert Leath	Chief Curator	\$90,000.00	0.00 %
Nat Norwood	Director of Education	\$53,000.00	0.00 %
Michelle Cook	Sr. Director of Development	\$95,000.00	0.00 %
Paola Ruiz	HR	\$46,000.00	0.00 %
Shelia Harrel-Roye	Interim Director of Visitor Engagement	\$45,000.00	0.00 %

D.6. Attach an organizational chart

Organizational Chart *Required

OSMG Organization Chart_11052018-1.pdf

D.7. Please complete the Diversity of Employment and the Employment Profile below. See the [Request for Proposals \(RFP\)](#) for definitions of position types used in the Employment Profile.

Describe the hiring process and how it is structured to provide the most diverse candidate pool.

Old Salem has a one-person Human Resources department; Paola Ruiz is the Manager of Human Resources. She addresses employee classifications, benefits, and issues, and oversees and manages all aspects of the employment application and hiring process.

HIRING PROCESS: The following steps are utilized to promote greater diversity and inclusivity in both the applicant

pool and staff at Old Salem.

1) Job Descriptions are written and submitted by the requesting department for review by the HR Manager.

2) Job Postings for both vacant and new positions are announced by the HR Manager, first internally and then externally if there are no appropriate internal candidates.

3) Recruitment ads are written using more inclusive language and will continue to be posted in a variety of places, including but not limited to, the Old Salem website, social media, local classified ads, and professional organization websites, as well as newspapers and social media outlets that are of special interest to people of color.

3) Applications, which can be downloaded from Old Salem’s website or obtained onsite, are directed to the HR Office for initial screening. The HR Manager screens applications and schedules interviews with applicants meeting the requirements. The HR manager and the requesting department manager interview the applicants and assess their capabilities to perform the required tasks. After an offer has been extended and accepted by the selected candidate, background and reference checks are conducted. Upon the successful completion of these checks, the candidate is called in to complete new hire paper work. When the new employee reports to work, Old Salem verifies their eligibility to work via the E-Verify system within the established time frame, and, assuming they are verified, the hiring process is complete.

Please enter the total number of Full-Time Positions and Employees you have in the table below

	Male - White	Male - Black	Male - Other	Female - White	Female - Black	Female - Other
Executives/Managers	5			1		
Professionals	8	1		12		
Technicians						
Office/Clerical				2		
Laborers/Service Workers	8	3		26	3	2

Please enter the total number of Temporary/Part-Time Positions (FTE) and Employees you have in the table below

	Male - White	Male - Black	Male - Other	Female - White	Female - Black	Female - Other
Executives/Managers				1		
Professionals						
Technicians						
Office/Clerical				4		
Laborers/Service Workers	19			58	4	2

D.8.



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

Copy of 05_OSMG_BOT_Full Slate_2019-2020_DRAFT.xlsx

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

3

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

4

ABILITY (5 POINTS)

D.11. Describe the implementation or operational plan to get the proposed project/program up and running in a timely manner. Describe any key contingencies on which the startup depends. Please upload any maps, milestones, etc. to "F. Required Documents."

Old Salem's day-to-day operations are up and running, and have been since 1950. Department heads meet with staff members to plan and schedule programming and project goals on a weekly basis or as needed. Post-event reviews are also held to monitor and evaluate the public's reception to programming and products and to assess goal achievements.

Execution of operational plans in a timely manner works hand-in-hand with careful budget monitoring. Each year in November and December, the administrative head of each department works closely with the President and Interim Chief Operating Officer to develop a workable budget for the upcoming fiscal year that

- a) meets our educational mission,
- b) provides a modest allowance for new programming or the flexibility to take advantage of unusual opportunities that benefit the public,
- c) addresses reasonable expectations for revenues and potential risk factors, and
- d) maintains our commitment to work toward a balanced operating budget.

D.12. How do your policies and procedures (including marketing, outreach, eligibility determination and appeals) ensure fair and equal access to the benefits of the program to all persons who seek to participate?

Old Salem Museums & Gardens is open and accessible to the general public without regard to race, color, religion, sex, national origin, age, disability or any other characteristic protected by law. Its employment opportunities, hiring practices and appeals process are also nondiscriminatory. That said, there are several ways in which Old Salem is making a concerted effort to improve accessibility to its programs and site, and to provide a more equitable environment, primarily but not exclusively, through three major initiatives.

- The "Hidden Town" Project is an initiative to tell the stories of enslaved and free African Americans living in and around Salem and to place these stories contextually within sites throughout Old Salem. Research, related programming and projects, and collaborations will help us to broaden and diversify our offerings, expand our perspectives, and make our stories of Salem more accessible to new audiences.
- "Access Salem" is an initiative that is addressing the issue of physical, cognitive and emotional accessibility to all of Old Salem's interpreted (and non-interpreted) spaces, as well as access to program content and activities. For a historic museum site, Old Salem is considered a bellwether for handicapped accessibility, but we can do better. Mindful of restrictions on historic properties, Old Salem is working with the Forsyth Historic Resource Commission to address these restrictions while preserving the integrity of our buildings.
- "Equity" is an initiative to create a conscious effort to encourage minority participation on our board and with our

staff in a way that represents and is more reflective of our community and society in general. We also seek to eliminate any latent bias at all levels of the organization and to provide a living wage to all of our employees based on local cost of living data.

In addition to the aforementioned initiatives, we will continue to host free community events in the historic district (i.e., Halloween trick-or-treating and Black History Month observances) and will conduct educational lectures and seminars and special presentations throughout the community to bring diverse audiences together and to celebrate our community

.

We have reduced print advertising and marketing significantly over the past several years in favor of social media outlets and online advertising, but our messaging and programs relay information that is broad in scope and nondiscriminatory in content. Likewise, our outreach into schools and public spaces is intended for broad audiences and mass appeal, and is nondiscriminatory in content.

E. Cost Effectiveness

Case Id: 10605

Name: Old Salem - 2020 - 2020/21

Completed by sbrittain@oldsalem.org on 11/22/2019 1:40 PM

Address: *No Address Assigned

E. Cost Effectiveness

Please provide the following information

BUDGET AND FUNDING (10 POINTS)

E.1. Please complete the table to show the organization's operating budget.

Expenditures by Program	Budgeted FY 19-20	Projected Actuals FY 19-20	Proposed Budget FY 20-21
Program Services	\$5,120,126.00	\$4,898,969.00	\$1,017,516.00
Fundraising	\$509,592.00	\$452,704.00	\$395,534.00
Management and General	\$422,441.00	\$459,678.00	\$1,644,575.00
	\$6,052,159.00	\$5,811,351.00	\$3,057,625.00

Expenditures by Category	Budgeted FY 19-20	Projected Actuals FY 19-20	Proposed Budget FY 20-21
Employee Salaries and Wages	\$3,009,888.00	\$2,942,950.00	\$2,990,037.00
Employee Benefits	\$599,284.00	\$551,061.00	\$559,878.00
Facility Rent and Utilities	\$467,411.00	\$445,733.00	\$450,190.00
Training and Conference Registration	\$11,135.00	\$7,443.00	\$7,517.00
Membership and Dues	\$15,505.00	\$12,746.00	\$12,873.00
Travel and Transportation	\$46,600.00	\$31,899.00	\$32,218.00
Grants to Individuals and Organizations	\$0.00	\$0.00	\$0.00
Contracted Fundraising Services	\$0.00	\$0.00	\$0.00
Goods Purchased for Resale	\$572,400.00	\$575,659.00	\$581,416.00
Other Contracted Services	\$323,598.00	\$319,549.00	\$322,744.00
Other Operating Expenditures	\$1,006,337.00	\$902,375.00	\$911,398.00
Capital Outlay	\$0.00	\$21,935.00	\$0.00
	\$6,052,158.00	\$5,811,350.00	\$5,868,271.00

Revenues by Category	Budgeted FY 19-20	Projected Actuals FY 19-20	Proposed Budget FY 20-21
City of Winston-Salem	\$185,000.00	\$197,710.00	\$300,000.00
Forsyth County	\$50,000.00	\$100,000.00	\$100,000.00
State of North Carolina	\$0.00	\$0.00	\$0.00
Federal Government	\$0.00	\$0.00	\$0.00
Admissions/Program Revenues/Sales	\$1,188,299.00	\$1,241,660.00	\$2,495,737.00
Memberships	\$691,200.00	\$507,585.00	\$512,661.00

Donations	\$114,000.00	\$426,800.00	\$431,068.00
Foundation Grants	\$60,000.00	\$60,000.00	\$110,000.00
Interest and Investment Income	\$0.00	\$0.00	\$0.00
Parent Organization	\$0.00	\$0.00	\$0.00
Other	\$3,824,425.00	\$3,683,179.00	\$3,646,347.00
	\$6,112,924.00	\$6,216,934.00	\$7,595,813.00

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

Other Operating Expenditures include supplies which would include everything the buildings use, firewood, etc. All special events supplies, office supplies, store supplies. We also have maintenance expenses in there as well as interest expense, insurance, and depreciation.

Other Revenues include endowment draw, rental property income and any other miscellaneous income received.

Currently, we do not have any federal government grants.

E.2. Has the City of Winston-Salem provided funding in the past? If so, provide a funding history of the most recent five years of City contributions in the table below.

Year	Funding Source	Funding Amount
2019	Operating Support	\$197,710.00
2018	Operating Support	\$206,520.00
2017	Operating Support	\$175,000.00
2016	Operating Support	\$175,000.00
2015	Operating Support	\$175,000.00

E.3. Please complete the table below to show specific details of proposed City funding and other leveraged funding for the proposed project/program.

Activity	Funding Requested from City	Funds from Other Sources	Other Funds Source
General Operating	\$300,000.00	\$100,000.00	Forsyth County
General Operating	\$0.00	\$1,406,165.00	Admissions/Classes
General Operating	\$0.00	\$1,174,260.00	Memberships/Donations
General Operating	\$0.00	\$50,000.00	BB&T
General Operating	\$0.00	\$1,496,639.00	Endowment
General Operating	\$0.00	\$1,708,105.00	Retail
General Operating	\$0.00	\$148,013.00	Other
	\$300,000.00	\$6,083,182.00	

E.4. If this year's request is different in any way (amount, activities, etc.) from a prior year's request, explain how and why. If you are a new applicant, please describe how you would adjust your project/program if your funding request is not funded at the full amount.

Old Salem respectfully requests an appropriation of \$300,000, \$50,000 more than requested last year. We request this amount to help us continue to offer the high quality educational and cultural programming that visitors and residents have come to expect from Old Salem. Old Salem has undertaken a number of innovative and exciting new initiatives, which will build diversity and inclusivity, improve accessibility, expand innovative programming for visitors

and the community, and improve the liveability of our community—all of which will contribute to the economic vitality of Old Salem and the City of Winston-Salem. We will be seeking support for these initiatives through grants (including multi-year requests) with plans to build these initiatives into our annual operating budget over the next few years. A city grant will provide continued operating support while we secure funding for specific program support.

SUSTAINABILITY (7 POINTS)

E.5. Describe the plan to sustain the project/program funding in future years. Include information about other funding sources to leverage City funds requested.

Old Salem continues to seek ways to grow and sustain its revenue streams—including admissions and classes; donations, memberships, and grants; retail sales; and endowment income:

Admissions and Classes

Strategic marketing will continue to be used to drive attendance, based on results-based evaluations. We have increased ticket prices, a result of adding more exhibition venues and an attempt to be more in line with ticket prices at similar historic museum sites across the country.

Donations, Memberships and Grants

The Development Office continues to monitor membership and donation solicitations for maximum impact and to meet internal goals that supplement the budget.

By developing new initiatives like “Hidden Town,” “Activate Main Street” and “Access Salem”, and bringing Old Salem into national conversations on social issues, such as race relations, we are creating the potential for new avenues of support, especially through grants. We are in the process now of identifying prospective grantmakers.) In addition, grants will be sought for operational support, including requests to Forsyth County and the Arts Council.

Retail

Bakery operations provide a significant level of support for retail operations. To grow bakery production and increase efficiency, Old Salem moved its off-site bakery and its distribution center to Marketplace Mall in 2018. This larger site will accommodate more production equipment, allowing Old Salem to eliminate reliance on outside vendors to supplement baking operations and to provide a retail venue for our baked goods.

Endowment

Old Salem has a financial plan to reduce its endowment draw by 2022, thereby enabling us to return earned interest into the corpus of the endowment funds. We will also be seeking additional endowment support through planned giving, individual appeals, and foundation requests. In these ways, we expect to grow our endowment for the future sustainability of the museum.

BARRIERS (3 POINTS)

E.6. Describe any potential barriers to the project implementation and how you plan to overcome them.

Potential barriers which might affect Old Salem operations include the following:

- **ECONOMY:** A downturn in the economy can affect disposable income for individuals, families, and organizations, as well as the distance that visitors are likely to travel to come to Old Salem. To mitigate, Old Salem has taken a number of steps including:

- 1) Reducing hours of operation. (Like many museums, Old Salem is now closed on Mondays.)
- 2) Reducing staff and utilizing remaining staff in new roles in various areas of the historic district.

3) Increasing our volunteer base and the use of interns.

• **FUNDRAISING AND DONATIONS:** A downturn in the economy can also affect donations to any organization, increasing the competition among nonprofits for charitable contributions. Also, changes to tax laws may reduce charitable contribution deductibility. To mitigate, Old Salem plans to

- 1) Grow membership programs, which develop loyalty to the institution, create mechanisms for annual giving, and offer donors tangible benefits.
- 2) Increase grant submissions.
- 3) Increase planned giving.
- 4) Build endowment for future sustainability.
- 5) Leverage our new initiatives to secure support through new venues and grantmakers.

• **WEATHER:** Inclement weather can have a negative impact on business operations, lowering ticket sales and retail income. To mitigate, Old Salem

- 1) Plans special one-of-a-kind programming and indoor events to ameliorate the effects of bad weather.
- 2) Reschedules events.
- 3) Makes up the shortfall from canceled events through other income-producing areas.

• **RETAIL SALES:** The profitability of Old Salem's retail operations is sensitive to sales volume required to cover its fixed overhead costs. Sales volume is dependent, in large part on attendance. To mitigate, Old Salem

- 1) Regularly monitors product sales for greatest profitability.
- 2) Sells products through our brick-and-mortar stores.

• **PROGRAMMING:** Programming must be inspiring, exciting, relevant, and innovative to attract the public, particularly diverse populations. Old Salem routinely:

- 1) Develops new educational programming and days with special themes.
- 2) Cultivates collaborations and partnerships with other organizations.
- 3) Introduces programming that encourages engagement with diverse populations, like "Hidden Town."

AVERAGE COST (5 POINTS)

E.7. Use the table below to show the average amount of City funds requested per beneficiary to be served during the year and the average total cost of the service per beneficiary to be served during the year (including all funding sources)

Proposed funds from the City for this project:	\$300,000
Number proposed to be served for the year:	440,000
Average City funds per beneficiary:	\$.68
Proposed funds from all sources:	\$6,216,934
Number proposed to be served for the year:	440,000
Average total funds per beneficiary:	\$14.12

F. Required Documents

Completed by sbrittain@oldsalem.org on 11/22/2019 1:40 PM

Case Id: 10605

Name: Old Salem - 2020 - 2020/21

Address: *No Address Assigned

F. Required Documents

Please provide the following information

Documentation

Code of Conduct/Conflict of Interest Policy *Required

016_OSMG_BOT_Conflict_of_Interest_2019-2020.pdf

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

990-PF 2018.pdf

Organization By-Laws *Required

018_OSMG_BOT_By-Laws_2019-2020.pdf

Articles of Incorporation *Required

Articles of Incorp 1950.pdf

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

Policies.pdf

IRS 501(c)3 Designation Letter *Required

IRS tax-exempt status_document.pdf

Audited financial statements or a third-party review *Required

123118 Old Salem Financial Statements Final.pdf

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

*Required

NCSL 2019.docx

Other

3rd-QTY-2019_3.pdf

OSMG_Presidents-Update_Second-Quarter_2019.pdf

G. Community Development Only

Completed by sbrittain@oldsalem.org on 11/22/2019 1:40 PM

Case Id: 10605

Name: Old Salem - 2020 - 2020/21

Address: *No Address Assigned

G. Community Development Only

** Complete this section only if you are requesting funds for a Community Development project (for CDBG, HOME and/or ESG funding).**

If the section is not applicable to your project, please leave the questions blank and mark the step "Complete."

1. In the right-hand column below, indicate the number of participants to be served by the proposed project/program within each income category during the year. Click [here](#) to see Winston-Salem income limits by household size.

Ranges of Income	# to be served
0 to 30% of median	0
31% to 50% of median	0
51% to 80% of median	0
Greater than 80% of median	0

2. Describe policies, procedures, and criteria for determining who is eligible. Describe the procedures for screening, eligibility determination, intake, assessment and orientation of participants

3. Explain how services will assist participants in reaching objectives of the proposed project/program. Describe the policies or procedures for follow-up after participants leave the proposed project/program.

H. Construction/Rehab Only

Completed by sbrittain@oldsalem.org on 11/22/2019 1:40 PM

Case Id: 10605

Name: Old Salem - 2020 - 2020/21

Address: *No Address Assigned

H. Construction/Rehab Only

** Complete this section only if you are requesting funds for a Housing Construction or Rehabilitation project.**
If the section is not applicable to your project, please leave the questions blank and mark the step "Complete."

1. Describe the proposed project, including any plans. If the project is approved, we will need a detailed work write-up.
2. Provide a projected timeline for the proposed work.
3. Describe how the project will be managed, including the contractor procurement process.
4. Describe the target market, including any special populations to be served.
5. Describe the services or program you plan to provide.
6. Describe the property management plan.
7. List the development team members.
8. Describe the financial capability of the sponsor/owner organization, including submission of the organization's operating budgets, agency audits, and Form 990s for the prior three years, unless already submitted to the City.
9. Listing of projects undertaken by principals over the past ten years, identifying project name and address, type of project, and number of units; please note any projects for which local government funding was received.

Project Name	Address	Type of Project	No. Units	Govmt Funding
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Documentation

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

***No files uploaded*

Development costs that include a detailed sources and uses statement of all funds, including the requested loan from the City, in electronic format, preferably a spreadsheet.

***No files uploaded*

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

***No files uploaded*

Operating Budget

***No files uploaded*

Form 990

***No files uploaded*

I. Emergency Shelter Only

Completed by sbrittain@oldsalem.org on 11/22/2019 1:40 PM

Case Id: 10605

Name: Old Salem - 2020 - 2020/21

Address: *No Address Assigned

I. Emergency Shelter Only

** Complete this section only if you are requesting funds for an Emergency Shelter project.**

If the section is not applicable to your project, please leave the questions blank and mark the step "Complete."

Prior to the beginning of any funding year, any ESG-funded program must participate in the local Homeless Management Information System (HMIS) designated by the Winston-Salem/Forsyth County Continuum of Care, or for domestic violence programs, a comparable database in accordance with HUD's standards.

Emergency Shelter: Essential Services

Activity	Total Budget (\$)
Case Management	\$0.00
Child Care	\$0.00
Education Services	\$0.00
Employment Assistance	\$0.00
Job Training	\$0.00
Outpatient Health Services	\$0.00
Transportation	\$0.00
Legal Services	\$0.00
Services to Special Population	\$0.00
Overhead Costs (limited to 15% of total activity request)	\$0.00
	\$0.00

Emergency Shelter: Operating Costs

Activity	Total Budget (\$)
Rent	\$0.00
Shelter Security	\$0.00
Fuel	\$0.00
Equipment	\$0.00
Insurance	\$0.00
Utilities	\$0.00
Food	\$0.00
Furnishings (limited to less than \$500 per item)	\$0.00
Supplies	\$0.00
Maintenance or Minor Repairs	\$0.00
Overhead Costs (limited to 15% of total activity request)	\$0.00
	\$0.00

J. Rapid Rehousing and HMIS Only

Completed by sbrittain@oldsalem.org on 11/22/2019 1:41 PM

Case Id: 10605

Name: Old Salem - 2020 - 2020/21

Address: *No Address Assigned

J. Rapid Rehousing and HMIS Only

** Complete this section only if you are requesting funds for a Rapid Rehousing project.**

If the section is not applicable to your project, please leave the questions blank and mark the step "Complete."

Prior to the beginning of any funding year, any ESG-funded program must participate in the local Homeless Management Information System (HMIS) designated by the Winston-Salem/Forsyth County Continuum of Care, or for domestic violence programs, a comparable database in accordance with HUD's standards.

Rapid Rehousing Financial Assistance

Activity	Total Budget (\$)
Rent Assistance	\$0.00
Rental Application Fees	\$0.00
Security Deposits	\$0.00
Last Month's Rent	\$0.00
Utility Deposits	\$0.00
Utility Payments	\$0.00
Moving Cost Assistance	\$0.00
Overhead Costs (limited to 15% of total activity request)	\$0.00

Rapid Rehousing Services

Activity	Total Budget (\$)
Case Management	\$0.00
Housing Search and Placement	\$0.00
Mediation	\$0.00
Legal Services	\$0.00
Credit Repair	\$0.00
Counseling	\$0.00
Information and Referral	\$0.00
Monitoring/Evaluation of Progress	\$0.00
Overhead Costs (limited to 15% of total activity request)	\$0.00

HMIS/Data Collection Budget

HMIS Activity	City ESG Request	State ESG Request
Staff Costs	\$0.00	\$0.00
Equipment	\$0.00	\$0.00
User Fees	\$0.00	\$0.00
	\$0.00	\$0.00

Submit

Completed by sbrittain@oldsalem.org on 11/22/2019 1:41 PM

Case Id: 10605

Name: Old Salem - 2020 - 2020/21

Address: *No Address Assigned

Submit

I certify that the applicant meets the conditions specified in the application instructions and will be able to carry out the proposed services in concert with these conditions. I also certify that the organization is a certified IRS 501(c)(3) non-profit organization.

Franklin Vagnone

Electronically signed by sbrittain@oldsalem.org on 11/22/2019 1:41 PM