

A. Organization & Contact Information

Completed by smatthews@shepherdscenter.org on 11/3/2019 3:53 PM

Case Id: 10625

Name: Shepherd's Center of Greater Winston-Salem -

Address: *No Address Assigned

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

Shepherd's Center of Greater Winston-Salem

A.2. Project/Program

Services for Older Adults

A.3. FY 2020-21 Funding Request Amount

\$25,000.00

A.4. Agency's Total Operating Budget

\$604,000.00

A.5. Mailing Address

1700 Ebert Street Winston-Salem, NC 27103

A.6. Project/Program Location Address

1700 Ebert Street Winston-Salem, NC 27103

A.7. Organization Website

www.shepherdscenter.org

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

1989

A.9. Organization Fiscal Year

January - December

A.10. Federal Tax ID Number

A.11. Federal DUNS Number

EXECUTIVE DIRECTOR/MANAGER

A.12. Name, Title

Samuel C. Matthews, Executive Director

A.13. Email

smatthews@shepherdscenter.org

A.14. Phone

(336) 748-0217

CONTACT

A.15. Name, Title

Samuel C. Matthews, Executive Director

A.16. Email

smatthews@shepherdscenter.org

A.17. Phone

(336) 748-0217

BOARD CHAIR

A.18. Name

Brent Stephens

A.19. Term Expiration

12/31/2019

A.20. Email

bstephens@craigejenkins.com

A.21. Phone

(336) 725-0583

B. Project Overview

Completed by smatthews@shepherdscenter.org on 11/11/2019
2:40 PM

Case Id: 10625

Name: Shepherd's Center of Greater Winston-Salem -

Address: *No Address Assigned

B. Project Overview

Please provide the following information

APPROACH (7 POINTS)

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

Continued funding is requested to support the Shepherd's Center of Greater Winston-Salem. The Shepherd's Center of Greater Winston-Salem is certified as a Senior Center of Excellence through the N.C. Division of Aging and Adult Services. The Shepherd's Center receives limited funding from the state through Home and Community Care Block Grant (HCCBG) and State General Purpose Senior Center funding. This funding represents approximately 10% of the total operational funding for our agency. For 2016-2017, 2017 – 2018, 2018 - 2019 and 2019 - 2020, the Shepherd's Center has been awarded \$15,000 in City of Winston-Salem funding for the services provided for the over 6,000 older adult residents we serve. We are requesting \$25,000 in funding from the City of Winston-Salem for 2020-2021 to support the increasing requests for services from older city residents aged 60+. Our growth has exceeded 20% since our funding began in 2016 .

Approximately 85% of the 6,000+ older adults served each year by the Shepherd's Center reside in the Winston-Salem city limits. Based upon the rising number of older adults in Forsyth County, and the lack of existing resources, there is a critical need to fund existing services for older adults.

The Shepherd's Center works collaboratively with Senior Services, Inc. with no duplication of services whatsoever. Each agency has a unique mission, target population and scope of services. We currently receive approximately 60% of our referrals from Senior Services as a participant in the Community Resource Connection (CRC). The programs and services of the Shepherd's Center enable older adults to remain independent in their own homes and complement the services offered by Senior Services. Additionally, health and wellness programs and activities are offered through our Vital Living Program which is unique to our service area. We are also a collaborative partner in the Age-Friendly Forsyth initiative. Our services include transportation to medical appointments and grocery shopping, minor home repairs as well as visitation and respite care for family caregivers. We serve over 2,500 older adults each year with these critical services.

Client surveys indicate that over 80% of those we serve would have not kept a medical appointment, gone without a meal or would have experienced significant family disruption with family caregiving. Over the first four years of City funding, we have responded to:

- over 33,000 requests for one-way transportation trips for medical services and grocery shopping for 4,875 older adults
- 2,743 minor home repair requests for over 1,340 older adults
- in excess of 7,500 individual or respite care visits
- coordinated caregiver training for over 200 family caregivers
- coordinated a monthly meal and social experience for over 450 older adults through the Saturday Night Fellowship Program for older adults who live in subsidized housing in the community.

Health and wellness programs provided by our center for active older adults are highly regarded statewide as we have

served over 3,500 adults annually.

Each year Shepherd's Center volunteers devote in excess of 40,000 hours of service, saving our local government and the community over \$1,000,000 in cost for the services provided.

As a certified Senior Center of Excellence, we are recognized as an exemplary "senior center without walls" as we offer activities in the broader community to serve older adults closer to where they live.

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

Participants have unlimited access to Shepherd's Center programs and services. The majority of services are provided at little or no cost to the participants. Promotion of the services is accomplished through the media (WS Journal, The Chronicle, Clemmons Courier, etc.), our agency website, and participation in local agency and health fairs conducted throughout the community.

Referrals for our services for older adults in need of services is accomplished through our collaboration with Senior Services, DSS, both area hospital systems, the faith community, home care and home health agencies, and other senior services providers.

The local medical community also refers participants to our health and wellness programs which include both land-based and water exercise classes.

We consistently track outcomes of the participants in all service areas. Our surveys indicate that over 80% of those receiving transportation services (1,200+ individuals) would have missed a medical appointment if it had not been for our services. And, 90% of those surveyed noted that our services allowed them to remain independent in their homes longer. Those who have received minor home repair services (currently averaging 60+ requests per month), indicate that these services allow them to remain independent in their homes as well. Of those currently being served, 65 - 70% live at or below 200% of the Federal Poverty Level.

Likewise, participants in the Shepherd's Center Vital Living Senior Center Program, report achieving significant health and wellness benefits. The offerings include Tai Chi for Arthritis, Tai Chi for Memory, Yoga, Matter of Balance classes, Living Healthy with Chronic Disease classes, warm water exercise classes 6 days per week along with bridge classes and sessions 5 days per week, day trips and numerous social activities. Surveys have shown that the types of classes offered not only benefit individual's health and wellness, but offer strong social connections which mitigate the significant side effects of social isolation which includes depression and failing health.

Referrals are routinely made by physicians in the community to both program areas for either access to services or health and wellness activities which help with strength, balance and memory issues.

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?

Across all program areas, the Shepherd's Center is projected to serve over 6,000 unduplicated older adults in 2019 - 2020. We project that number will be 6,500 for 2020 - 2021. Participation (duplicated) in all programs is projected to be 34,000 in 2019 - 2020 and 35,000 in 2020-2021.

The limit on those serviced at one time depends upon the services received. On average it would be approximately 250

per day across all programs and services. This would include recipients of transportation, minor home repairs, caregiver services as well as participants in health and wellness programs through our state-certified senior center of excellence.

As the Forsyth County coordinating site for the N.C. Department of Insurance Seniors' Health Insurance Information Program (SHIIP), we will provide education and counseling to over 1,500 Medicare beneficiaries in 2019 saving beneficiaries over \$450,000 in health care costs.

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.

According to the most recent Census data, there were 77,283 older adults (aged 60+) in Forsyth County. By 2036 it is projected that this number will grow to 110,176 - an increase of 42%. At present, there are more older adults in our community than there are individuals age 18 and under.

The individuals served by the Shepherd's Center live exclusively in Forsyth County with approximately 85% residing within the Winston-Salem city limits. 90% are above age 60; 75% are women, 40% minority and 60% fall below 200% of the Federal Poverty Level.

Older adult citizens benefit from programs and services which improve their overall living condition, health and social connections. Services allow older adults to remain independent in their own homes, receive health and wellness classes to support healthy lifestyles as well as information and referral to sources which provide them access to needed services. The major areas served within the City of Winston-Salem are:

ZIP Code and % of Those Served

- 27105 - 22%
- 27106 - 14%
- 27101 - 13%
- 27107 - 13%
- 27103 - 12%
- 27127 - 10%
- 27104 - 8%

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.

The greater Winston-Salem area has resources that provide home health services, telephone reassurance, financial assistance and limited medical transportation for elderly recipients. However, these services leave significant gaps – particularly for affordable services offered to older adults who desire to remain independent in their own homes as long as possible and those with disabilities who cannot access those services.

The recently completed Age-Friendly Forsyth (AFF) research collaborative indicated significant needs in the areas of transportation, home repairs, support for family caregivers and increased access to information regarding available services. It should be noted that these identified needs are those the Shepherd's Center addresses. See the attached overview of AFF.

Many older adults on fixed incomes cannot afford the services generally available to the public and must have the support of volunteer-driven organizations like the Shepherd's Center to remain independent. Our services, combined with other services received from collaborative partners has been shown to allow individuals to remain independent.

Funding for service for older adults is lacking in our community. Grants for aging services across the board do not allow the Shepherd's Center or other partners to adequately address the growing needs. There are waiting lists in almost all service areas. The increasing older population is resulting in ever increasing requests for services.

There are over 70,000 older adults in our community receiving Medicare health coverage. Our goal through the N.C. Seniors' Health Insurance Information Program (SHIIP) is to educate and counsel more than 1,500 of those individuals annually to assist with their healthcare coverage. As the Forsyth County coordinating site, the Shepherd's Center receives limited funding from the N.C. Department of Insurance to address the growing needs of the beneficiaries in our community.

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?

The Shepherd's Center excels in collaborating with many organizations within our community for effective program implementation and service delivery. Collaborations include active participation in Age-Friendly Forsyth, the City of Winston-Salem, Forsyth County, Social Security, the NC Department of Insurance, the Piedmont Council of Governments Area Agency on Aging, the Department of Social Services, Forsyth County Department of Health, Senior Services, Forsyth County Public Library system, Trellis/Hospice and Palliative Care Center, the Adaptables, the Enrichment Center, the Shepherd's Center of Kernersville, Financial Pathways/Senior Financial Care, Habitat for Humanity, Wake Forest Baptist Medical Center, FaithHealthNC, Novant Health/Forsyth Medical Center, Winston-Salem State University, Wake Forest University, Salem College, Forsyth Technical Community College, numerous area faith communities as well as all of the continuing care retirement communities in the area, independent living communities and numerous home health care agencies.

C. Strategy and Performance

Completed by smatthews@shepherdscenter.org on 11/10/2019
3:27 PM

Case Id: 10625

Name: Shepherd's Center of Greater Winston-Salem -

Address: *No Address Assigned

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):

Healthy Environment

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.

The Shepherd's Center program advisory committees, the board of directors and senior staff continue to monitor and evaluate all programs and services. The agency complies with all state and federal regulations regarding non-profit accounting, personnel management, taxes and reporting.

An annual audit is conducted and the agency is monitored annually for service provision and fiscal controls by the NC Division of Aging and Adult Services as well as the Piedmont Council of Governments Area Agency on Aging. Every 5 years the NC Division of Aging and Adult Services and the Area Agency on Aging also perform an in-depth programmatic monitoring as part of the N.C. Senior Center Certification process.

The Shepherd's Center has been certified by the NC Division of Aging and Adult Services and the Area Agency on Aging

on three occasions, the most recent in March 2018 and that recertification is valid from 2018 - 2023.

The N.C. Department of Insurance Seniors' Health Insurance Information Program (SHIIP) Division monitors for program and fiscal purposes for both annual grant funding as well as annual Medicare-related grant funding. The City of Winston-Salem Audit Division also monitors the agency.

During 2018, the Shepherd's Center served 5,600 older adults, 85% of whom reside within the city limits. A map of client and participant locations is attached. 2,121 older adults received assistance with transportation, minor home repairs as well as visitation and respite care services. 1,267 older adults were assisted with transportation; 399 with minor home repairs and 214 with caregiver services. Another 241 were served through caregiver training, the Saturday Night Fellowship Program as well as our aging coalition meetings.

3,500 individuals participated in daily senior center health and wellness programs, educational events, social activities and cultural offerings. 1,500 benefited from counseling for Medicare-related matters through the SHIIP program which we coordinate for the county.

Three other initiatives also continued this past year. 1) caregiver training (Powerful Tools for Caregivers – a nationally recognized evidenced-based program) is coordinated by the agency and offered for family caregivers throughout the community; 2) the Coalition of Ministries with Older Adults, a networking group begun by the agency in 2002 for clergy and staff serving older adults in area congregations as well as agency staff, meets monthly for networking, support and advocacy; 3) coordination of the monthly Saturday Night Fellowship program which was begun in 1967 and celebrated its 50th anniversary in 2017. We have coordinated the program since 2005.

If monitoring by any entity indicates any deficiency in services, fiscal controls or issues which might prevent us from meeting original goals, immediate action is taken to assess the causes for the deficiency and corrective action and planning will be undertaken to address the matter.

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.

Each program area tracks the individual services provided, the number of individuals served and activity on a daily and monthly basis. Participant data is maintained in a central database system. Participant and client involvement is maintained in service-level tracking systems.

Transportation clients, volunteers and activity requests are maintained in a nationally recognized and contracted system called RideScheduler. Daily, weekly and monthly reports are prepared for tracking and reporting to various stakeholders.

Minor home repair and caregiver services tracking is performed through a proprietary agency programs and services database. Vital Living Program Senior Center participation is maintained in a centralized tracking system that accounts for attendance at the activity level for each day, week and month.

For grants through the City DOT for FTA 5310 transportation funding and the Elderly and Disabled Transportation Program (EDTAP) funding we track service requests, medical and nutritional trips, new clients, volunteer usage and client demographics.

For annual Seniors' Health Insurance Information Program (SHIIP) grants we track counseling, cost savings, outreach and educational activities through a National Seniors' Health Insurance Program (SHIP) Tracking and Reporting System

data base (STARS) supported by the Administration for Community Living (ACL), a division of the Federal Department of Health and Human Services.

We produce service level reports and perform internal reviews monthly to track current and historical performance. Key reporting includes comprehensive review of transportation participants, volunteer support and service requests; minor home repair requests, repairs completed, repairs referred and pending repairs along with volunteer or volunteer group involvement.

Trends are monitored for activity and participation levels. Health and wellness program and participation activity is recorded daily and summarized monthly and annually. Trends are monitored for activity and participation levels.

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 Results	FY 20-21 Next Year Anticipated Results
Provide essential transportation for older adults for medical appointments and nutritional needs	<ol style="list-style-type: none"> 1. Provide older adult city residents with transportation services on an annual basis which allows them to remain independent in their own homes 2. Provide needed services which allow older adults to access needed health care and nutritional services 3. Utilize volunteers to provide the majority of the trip requests using their personal vehicles 	Responded to 8,410 one-way trip requests for 1,267 older adults	Respond to 8,750 one-way trip requests for 1,300 older adults	Respond to 9,000 one-way trip requests for 1,325 older adults
Provide minor home repairs for older adults allowing them to remain independent in their homes	1. Provide older adult city residents with minor home repair services which allow them to remain independent in their	Responded to 742 minor home repair requests for 399 older adults.	Respond to 800 minor home repair requests for 420 older adults.	Respond to 840 minor home repair requests for 450 older adults.

	<p>own homes</p> <p>2. Provide services which enable residents to live in a safe and secure residence</p> <p>3. Utilize volunteers to provide the labor for the repair needs</p> <p>4. Refer more difficult repairs to other agencies or vendors.</p>			
Provide health and wellness programs and activities through our Vital Living Senior Center program to older adults throughout the city	1. Offer daily physical fitness, educational and social programs to older adults throughout the city which will support their health and wellness as well as socialization needs.	Offered an average of 50 weekly physical fitness, educational and social programs throughout the city to 2,900 participants with an overall attendance of 34,926.	Offer an average of 50 weekly physical fitness, educational and social programs throughout the city to 3,200 participants with an overall attendance of 35,000.	Offer an average of 52 weekly physical fitness, educational and social programs throughout the city to 3,500 participants with an overall attendance of 35,750.

C.6. FY 18-19 Program Accomplishments

Our accomplishments include serving 5,600 older adults by responding to over 11,000 service level requests during 2018. We project serving in excess of 6,000 older adults and 12,000+ service requests in 2019.

The Seniors Health Insurance Information Program (SHIIP) which the agency coordinates for the county, served 1,500 Medicare beneficiaries which resulted in over \$450,000 in savings in 2017. SHIIP is a division of the N.C. Department of Insurance.

Additionally, we were successful in receiving continued city and county funding (4 years each), increased grant funding through the Winston-Salem DOT for the FTA 5310 transportation program and the state Elderly and Disabled Transportation Program (EDTAP) funding to support the transportation program growth and expanding services to accommodate wheelchair transportation and multiple trips during the week for older adults.

We reached a record level of individuals served during the 2018 and funding to sustain current levels of service provision.

We are actively participating in the Age-Friendly Forsyth (AFF) initiative which is focused on developing a comprehensive long-range aging plan for our community. We are a funding partner, serve on the AFF Leadership Team and the Executive Director is Vice Chairperson and serves on the AFF Executive Team.

C.7. FY 20-21 Key Objectives

Our key objectives include serving in excess of 6,500 older adults while responding to over 12,000 service level requests through our Faith In Action Care Program and Vital Living Senior Center Program. Additionally, services offered through the Seniors Health Insurance Information Program (SHIIP) will serve 1,500 Medicare beneficiaries.

We project receiving continued city and county funding, increased grant funding through the Winston-Salem DOT for the FTA 5310 Elderly and Disabled transportation program and the state Elderly and Disabled Transportation Program (EDTAP) to support the transportation program growth and expanding services.

We again anticipate reaching a record level of individuals served and funding to sustain current level of service provision. We also project recruiting 100 new volunteers to assist in service provision.

We will continue to be an active partner in the Age-Friendly Forsyth (AFF) initiative, serve on the AFF Leadership Team and AFF Executive Committee.

D. Organizational Capacity

Completed by smatthews@shepherdscenter.org on 11/11/2019
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Case Id: 10625

Name: Shepherd's Center of Greater Winston-Salem -

Address: *No Address Assigned

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?

The mission of the Shepherd's Center of Greater Winston-Salem is to promote and support successful aging by providing direct services, volunteer opportunities and enrichment programs for older adults. We serve not only the city but also 85% of Forsyth County . The Shepherd's Center was established in 1985 and is a 501 c(3) not for profit organization. 2020 will mark our 35th year of service in the community. The center has been certified by the N.C. Division of Aging and Adult Services as a Senior Center of Excellence since 2008.

The Shepherd's Center is comprised of two (2) distinct, yet complementary, program areas which are serving the growing needs of the increasing number of older adults in our community. These program areas are critical to, and advance, the mission of the Shepherd's Center.

The Faith In Action Care Program of the center serves approximately 2,200 older adults (age 60+). The majority of those served were able to remain independent in their own homes as a result of the services provided. Volunteers and staff respond to over 9,000 requests for services during the year. Support is provided to individuals and families through the efforts of over 275 program volunteers who invest in excess of 25,000 hours of volunteer time.

During 2018, volunteers in the Faith In Action Care Program responded to 8,410 one-way transportation requests. 742 requests for minor home repair services and 214 continuing, as well as new requests for, visitation and respite care services were received. The agency also coordinated training for family caregivers, new volunteers and continuing education for the volunteers in the program. We have worked in concert with the Community and Business Development Department of the city on a number of home repairs for those we serve.

Three other initiatives also continued this past year. 1) caregiver training (Powerful Tools for Caregivers – a nationally recognized evidenced-based program) is coordinated by the agency and offered for family caregivers throughout the community; 2) the Coalition of Ministries with Older Adults, a networking group begun by the agency in 2002 for clergy and staff serving older adults in area congregations as well as agency staff, meets monthly for networking, support and advocacy; 3) coordination of a monthly Saturday Night Fellowship program which was begun in the 1967 and celebrated it's 50th anniversary in 2017. We have coordinated the program since 2005.

The Vital Living Senior Center Program offers activities at our facilities at our Westview Campus as well as other locations in the community and serves in excess of 3,500 older adults. Daily programs allow older adults (age 50+) to participate in appropriately designed exercise classes, health and wellness seminars, arts and crafts, fellowship and discussion groups, games, day trips, educational classes and other activities. Daily health and fitness classes are

offered to include evidenced-based programs supporting strength and balance in older adults.

Additionally, a significant service is the Seniors' Health Insurance Information Program (SHIIP) which provides trained senior volunteers who offer information to individuals and families regarding Medicare and Medicaid insurance as well as Long Term Care and Medicare supplement insurance. The SHIIP program is a program of the N.C. Department of Insurance. During 2017, over 1,500 individuals were served and over \$450,000 was saved for Medicare beneficiaries in 2018.

FUNCTION (5 POINTS)

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

Since 1985. 2020 will mark our 35th year of service to aging adults in our community.

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

The individuals served by the Shepherd's Center live exclusively in Forsyth County with approximately 85% residing in the Winston-Salem area. Older adult citizens benefit from programs and services which improve their overall living condition, health and social connections. Services allow older adults to remain independent in their own homes, health and wellness classes to support healthy lifestyles as well as information and referral to sources which provide them access to needed services.

During our 2019 fiscal year, our volunteers reported in excess of 41,000 hours of service, which (using the national average of \$24.69 per volunteer hour from the Independent Sector) saved our community approximately \$1,020,000 in the cost of services provided for older adults - over \$185 per person served.

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
FIA Pgm Director	Management and supervision of transportation, minor home repair and caregiver respite care/visitation service areas. Five direct reports are responsible for the day-to-day activities for the service areas outlined. Supervises the coordination and support of 275+ service-level volunteers.	40	12.00 %
Senior Center Dir	Management and supervision of the senior center program and activities. One full time assistant direct report. Program offers and coordinates approximately 55 health and wellness activities each week.	40	8.00 %

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
Samuel C. Matthews	Executive Director	\$65,000.00	3.00 %
Linda M. Lewis	Faith In Action Program Director	\$58,500.00	12.00 %
Kristin N. Larson	Vital Living Senior Center Director	\$38,000.00	8.00 %

D.6. Attach an organizational chart

Organizational Chart *Required

Organization Structure October 2019.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.

As positions become open (there has been relatively low turnover in the last 5 years), they are advertised locally and regionally for certain positions.

Candidate applications and resumes are evaluated for ability to perform the functions required and relative experience. There is no discrimination based on gender, race, religion, sexual orientation or ethnicity. Interviews are conducted with applicants which best meet the training and experience needed for the position(s). Interview are conducted by management and staff related to the service area.

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	1			2		
Professionals						
Technicians						
Office/Clerical						
Laborers/Service Workers						

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				3		
Technicians				4		
Office/Clerical				2		
Laborers/Service Workers						

D.8.

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

Board Listing 2019.pdf

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

11

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

6

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."

The Shepherd's Center's programs and services are well established with a 34+year track record of accomplishment. The programs being funded have been actively in place since 1999. Funding and certification has been achieved for each agency program area. Standard operational plans are in place for each program area and for service-level activities. Attached you will find maps of those currently served throughout the community and a Impact Summary at a Glance of accomplishments during our last calendar year.

Over the last ten years, we have successfully expanded the two programs significantly while increasing the number of older adults served by 103% (from 2,649 to 5,600). Service requests increased in all program areas by 163% (from 6,443 to 16,961). The number of volunteers engaged in agency services has increased by 34% (from 445 to 597) and hours of volunteer time has increased by 96% (from 24,000 to 47,000). During this same time, paid staff has grown from 6 (2 FT/4 PT) to 12 (4 FT/8 PT) individuals.

Over the last 12 years the following major milestones have been achieved:

- Received an Award of Achievement in Older Volunteer Program Management by the MetLife Foundation and the National Association of Area Agencies on Aging (n4a) as part of the 2007 MetLife Foundation Older Volunteers Enrich America (OVEA) Program Awards.
- Received the 2008 Joel A. Weston, Jr. Memorial Award for Non-Profit Excellence
- Received the 2009 Ernest B. Messer Award from the N.C. Division of Aging and Adult Services for an organization that has excelled in addressing the needs of older citizens in it's community.
- Recognized as one of 25 outstanding programs in volunteer transportation for older adults by the Beverly Foundation and the National Faith In Action Program in 2007.
- Received certification as a Senior Center of Excellence by the North Carolina Division of Aging and Adult Services in January 2008. The certification is the highest level for senior centers and is for a 5-year period (2008 – 2013).
- Received re-certification as a Senior Center of Excellence by the North Carolina Division of Aging and Adult Services in February 2013. The certification is the highest level for senior centers and is for a 5-year period (2013 – 2018).
- Received re-certification as a Senior Center of Excellence by the North Carolina Division of Aging and Adult Services in March 2018. The certification is the highest level for senior centers and is for a 5-year period (2018 – 2023).

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?

All individuals 60 and older who live in Forsyth County are eligible for services and participation in sponsored activities regardless of income, race, faith tradition or sexual orientation. We conduct outreach in the community through engagement with community partners in the aging field, numerous congregations, Novant/Forsyth Medical Center and senior housing communities. We include announcements in all local print, radio and television media regarding programs and services and we participate in both faith community and corporate sponsored agency and/or health fairs on a regular basis throughout the year.

We maintain an active website and social media presence which provides access to information or requesting of

services. Information regarding our services are included in our Agency and program newsletters as well as electronic announcements are sent to participants of record, agencies, media and other constituents.

Participants access our services by engaging in center activities throughout the community, contacting our agency for information and assistance as well as requests for assistance with direct services.

We are also listed with multiple information portals which provide consumers access to information. These include Senior Services Help Line and Directory of Services for Older Adults, the 211 system, MyCommunity (Novant) and HandsOn NWNC.

E. Cost Effectiveness

Case Id: 10625

Name: Shepherd's Center of Greater Winston-Salem -

Completed by smatthews@shepherdscenter.org on 11/6/2019 3:26 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	\$551,425.00	\$578,500.00	\$610,000.00
Fundraising	\$20,500.00	\$23,750.00	\$26,500.00
Management and General	\$32,075.00	\$34,750.00	\$36,700.00
	\$604,000.00	\$637,000.00	\$673,200.00

Expenditures by Category	Budgeted FY 19-20	Projected Actuals FY 19-20	Proposed Budget FY 20-21
Employee Salaries and Wages	\$295,300.00	\$312,646.00	\$322,100.00
Employee Benefits	\$40,100.00	\$42,454.00	\$43,750.00
Facility Rent and Utilities	\$23,000.00	\$24,200.00	\$35,250.00
Training and Conference Registration	\$3,000.00	\$1,000.00	\$2,000.00
Membership and Dues	\$3,000.00	\$2,000.00	\$2,500.00
Travel and Transportation	\$4,600.00	\$2,300.00	\$3,000.00
Grants to Individuals and Organizations	\$0.00	\$0.00	\$0.00
Contracted Fundraising Services	\$0.00	\$0.00	\$0.00
Goods Purchased for Resale	\$0.00	\$0.00	\$0.00
Other Contracted Services	\$65,000.00	\$75,800.00	\$84,500.00
Other Operating Expenditures	\$170,000.00	\$176,600.00	\$180,100.00
Capital Outlay	\$0.00	\$0.00	\$0.00
	\$604,000.00	\$637,000.00	\$673,200.00

Revenues by Category	Budgeted FY 19-20	Projected Actuals FY 19-20	Proposed Budget FY 20-21
City of Winston-Salem	\$25,000.00	\$15,000.00	\$25,000.00
Forsyth County	\$40,000.00	\$33,000.00	\$40,000.00
State of North Carolina	\$74,000.00	\$84,500.00	\$84,000.00
Federal Government	\$90,000.00	\$125,000.00	\$150,000.00
Admissions/Program Revenues/Sales	\$46,000.00	\$50,000.00	\$55,000.00

Memberships	\$0.00	\$0.00	\$0.00
Donations	\$100,000.00	\$105,750.00	\$110,000.00
Foundation Grants	\$70,000.00	\$58,000.00	\$45,000.00
Interest and Investment Income	\$9,000.00	\$8,900.00	\$7,500.00
Parent Organization	\$0.00	\$0.00	\$0.00
Other	\$150,000.00	\$156,850.00	\$156,700.00
	\$604,000.00	\$637,000.00	\$673,200.00

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

Federal Government income is as a sub-recipient of FTA funding via the WSDOT. Other operating revenue include fundraising income, faith community support, organizations, sales tax refunds and corporate support. Other operating expenses include audit, insurance, minor home repair expenses for clients, fundraising expenses, furniture and fixtures, publicity and sales taxes which are subsequently refunded.

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	General	\$15,000.00
2018	General	\$15,000.00
2017	General	\$15,000.00

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
Salaries and Wages	\$10,000.00	\$312,100.00	Foundation and
Program Operations	\$15,000.00	\$361,100.00	Foundation and
	\$25,000.00	\$673,200.00	

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.

Our request for 2020 - 2021 is for \$25,000 as compared to prior grants of \$15,000. Our service requests have increased substantially over the last three years as have the unduplicated participants served. Likewise, our budget has increased to meet the increased demand.

Grants from other sources are projected to remain rather level and the funding increase is requested to meet the increased demand of the numbers served and the increased demand for services. The same is being requested of the county. State and federal funding remains flat as services for older adults is considered discretionary.

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.

Our five year strategic plan indicates confidence in the sources of revenue listed. County funding as well as Federal and State funding for program operations appear solid, but with little increase.

With the growing population of older adults in our city, along with a dedicated staff responsible for volunteer recruitment and sustainability, we are also confident that the volunteer resources will be available going forward.

Over the last three years with support of city funding, we have operated within our revenue and expense budget while our requests for services have increased over 10%.

Additionally, we raised over \$510,000 in addition to our annual budget for capital expenses associated with renovation and maintenance of our facilities during 2016 and 2017. This shows our capacity as significant needs arise. Our funding through the Federal Transportation Administration's Elderly and Disabled transportation funding through the WS Department of Transportation has increased steadily which has allow us to respond to the #1 priority of transportation for older adults in our community.

We have an endowment with the Winston-Salem Foundation. As of September 30, 2019, the value of the endowment is \$125,200. \$49,100 of that value is designated as grantable funds which, at the discretion of the board, can be used for operating expenses. Since inception of the endowment, no funds have been withdrawn. In our 2019 strategic planning retreat, we focused, among other matters, on growing our endowment, with WS Foundation matching funds, to \$250,000.

BARRIERS (3 POINTS)

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

We do not see significant barriers in 2020-2021. Potential barriers we may face are sustaining operating revenue and volunteer resources; however, these resources appear to be firm for the next fiscal year. We continually seek funding from individuals, program and operating grants, successful fundraising events and reasonable program fees.

Our five year strategic plan indicates confidence in these sources of revenue. With the growing population of older adults in our city, along with a dedicated staff person responsible for volunteer recruitment and sustainability, we are also confident that the volunteer resources will be available for the foreseeable future.

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:	\$25,000
Number proposed to be served for the year:	6,500
Average City funds per beneficiary:	\$3.85
Proposed funds from all sources:	\$610,000
Number proposed to be served for the year:	6,500
Average total funds per beneficiary:	\$93.85

F. Required Documents

Completed by smatthews@shepherdscenter.org on 11/6/2019 3:32 PM

Case Id: 10625

Name: Shepherd's Center of Greater Winston-Salem -

Address: *No Address Assigned

F. Required Documents

Please provide the following information

Documentation

Code of Conduct/Conflict of Interest Policy *Required

Conflict of Interest Policy - Revised 08-2008.pdf

Conduct & Ethics - Whistleblower Policy.doc

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

Final 990 and schedules Approved by Board, Signed and Submitted 09-08-19.pdf

Organization By-Laws *Required

BYLAWS August 2011.pdf

Articles of Incorporation *Required

Articles of Incorporation.pdf

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

Financial Policy and Procedure Manual.doc

Cash Control Policy.doc

Confidentiality Policy.doc

Investment Policy.docx

Records Retention Policy.doc

Employee Handbook.pdf

IRS 501(c)3 Designation Letter *Required

IRS 501c3 Doc.pdf

Audited financial statements or a third-party review *Required

2018 Shepherd's Center Audit.pdf

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

***Required**

NC Secretary of State Status Report.pdf

Other

Certificate.pdf

2018 Program Summary At a Glance.pdf

SC_Clients_and_Participants_and_PercentUrban_blockGroup.pdf

Monitoring Report Letter - Shepherd's Center of Greater W-S - SFY 18.pdf

AFF Key Findings Noted with SC Services.pdf

G. Community Development Only

Completed by smatthews@shepherdscenter.org on 11/3/2019 3:48 PM

Case Id: 10625

Name: Shepherd's Center of Greater Winston-Salem -

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 smatthews@shepherdscenter.org on 11/3/2019 3:48 PM

Case Id: 10625

Name: Shepherd's Center of Greater Winston-Salem -

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 smatthews@shepherdscenter.org on 11/3/2019 3:49 PM

Case Id: 10625

Name: Shepherd's Center of Greater Winston-Salem -

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 smatthews@shepherdscenter.org on 11/3/2019 3:49 PM

Case Id: 10625

Name: Shepherd's Center of Greater Winston-Salem -

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 smatthews@shepherdscenter.org on 11/11/2019
2:56 PM

Case Id: 10625

Name: Shepherd's Center of Greater Winston-Salem -

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.

Samuel C. Matthews

Electronically signed by smatthews@shepherdscenter.org on 11/11/2019 2:56 PM