

A. Organization & Contact Information

Case Id: 14258
Name: Old Salem Museums & Gardens - 2022/23
Address: *No Address Assigned

Completed by sbrittain@oldsalem.org on 11/18/2021 10:46 AM

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 Museums & Gardens

A.2. Project/Program

Operating Support

A.3. FY 2022-23 Funding Request Amount

\$232,000.00

A.4. Agency's Total Operating Budget

\$4,675,386.00

A.5. Mailing Address

600 South Main Street Winston-Salem, NC 27101-5329

A.6. Project/Program Location Address

600 South Main Street Winston-Salem, NC 27101-5329

A.7. Organization Website

<https://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, President & CEO

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) 406-5342

BOARD CHAIR

A.18. Name

G. William Joyner

A.19. Term Expiration

12/31/2023

A.20. Email

wijoyner@kilpatricktownsend.com

A.21. Phone

(336) 829-6366

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B. Project Overview

Completed by sbrittain@oldsalem.org on 11/18/2021 10:46 AM

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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?

Old Salem Museums & Gardens (OSMG) has begun a phased re-opening after being closed since March 2020 due to the COVID-19 pandemic. In order to fully re-open, we will need to re-build our staff and add new staff positions. During our closure, Old Salem began a restructuring of our programs to a hybrid model - both online and in person. This model will operate with post-COVID protocols in place including a workweek from Wednesday - Saturday 10 AM - 2 PM. We plan to continue our community outreach through our free produce and bread baking efforts that began in 2020. We are asking the City of Winston-Salem to partner with us by providing funds to rebuild our staff.

Our pre-Covid staff size was 136. Between the beginning of the pandemic and now, we laid off 70 employees. Currently, we have 71 staff with 25 recalled staff and eight still on furlough. As of November 5, 2021, our racial diversity is at 21% (Forsyth County is at 43.9%) and our total diversity (religious, gender identity, etc.) is at 26%. Pre-COVID, our median hourly rate for full-time staff members was \$11.00. Our current median hourly rate is \$13.00 with new staff starting at \$11.18 per hour. We have had to cut back our programming due to staffing shortages which means we cannot fully re-open our doors until we can re-build our staff. A particular need is rebuilding and restaffing our education department. We also plan to add additional staff in maintenance, horticulture, visitor experience, and retail.

Pre-Covid (Jan 2020), our Education Department (known as Learning in Place) had 46 staff members. Most of these staff were full-time and had been with us a long-time. In October 2020, the North Carolina Department of Public Instruction named Old Salem an official digital resource for STEAM subject areas, as well as traditional subject areas such as history and social studies. In order to attract more advanced, technically savvy, trained, and skilled staff, we must provide a living wage and more regular cost of living raises. Because of this designation, a higher level of professionalism was needed to help create new curriculum and programming. This calls for higher salaries for higher-caliber individuals. We are now hiring Educators (teachers) that currently have or have held a teaching license. Out of this higher standard, the Education Coordinator role was created. Educators need to be able to create lesson plans and content, which means they should have actual classroom experience. If we are going to be comparable with the state in salary for teachers, we need to be able to pay at least \$15.00/hr. for our Educators. Even though they are not in a classroom, they're giving "classroom" lessons with a STEAM focus and providing curriculum for both in-person and video learning for teachers.

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

COVID-19 protocols and mask mandates allow the visiting public to access the historic buildings at Old Salem. The best way to access and experience Old Salem is by visiting the historic district. While historic buildings are currently open from 10 AM - 2 PM Wednesday - Saturday, the historic district is accessible for the Salem Pathways, where you can experience the personal lives, achievements, and challenges of real-life individuals who lived in or visited Salem from 1770 to 1989, any time. In addition, our online videos and educational curriculum are available for viewing and download at any time.

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. In addition, Old Salem Holiday tours will be available again this year and we expect to return to pre-Covid holiday programming in 2022.

In addition to enjoying Old Salem through onsite visits, individuals may participate in Old Salem events through our offsite educational and cultural programming opportunities such as the Furniture Seminar, Design Seminar, Map and Cartography Seminar, Biennial Conference, the Summer Institute, etc. All of these highlight the City of Winston-Salem. 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. While we have not been able to provide the number of events, workshops, and programming we provided pre-COVID, we are starting to provide some of these and hope to be up to pre-COVID levels in 2022 - 2023.

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 as well as online. 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, Tik Tok, Instagram, 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. Describe the unmet need that the proposed project/program seeks to address. 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. In addition, requests for our educational videos and curriculum come from all over the US. Each of these visitor interactions, whether in person or virtual, provides an opportunity to highlight the City of Winston-Salem and all it has to offer.

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.

As has been the case with many organizations due to COVID, Old Salem has taken a large financial hit, particularly since we were closed to the public from March 2020 - Spring 2021. In 2020, OSMG recognized a loss of \$1,196,599. Due to the high demand for our STEAM education videos and curriculum, we have had to re-think our staffing needs for our Learning in Place division. We need certified teachers - Education Coordinators-who can plan lessons and write curriculum for teachers. This requires a higher caliber of employee, and to be competitive, we must provide these employees with a living wage. The rest of our staff have not had a cost-of-living salary adjustment in a while, and we would like to be able to offer a 5.9% increase to keep the staff we have from joining the great COVID resignation.

COLLABORATION (6 POINTS)

B.4. 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.

Due to the COVID-19 pandemic, our biggest collaborations were with Second Harvest Food Bank and H.O.P.E. Winston-Salem for garden vegetables and bread. Through our Victory Gardens, we were able to distribute over 6,500 pounds of food to our neighbors in need. In addition, we distributed over 20,500 loaves of bread to local communities.

C. Strategy and Performance

Completed by sbrittain@oldsalem.org on 11/18/2021 10:46 AM

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C. Strategy and Performance

Please provide the following information.

STRATEGY (5 POINTS)

C.1. The City of Winston-Salem's strategic priorities, adopted most recently in the [2017-2021 Strategic Plan \(2019 Update\)](#) and under review for adoption by City Council for FY 2022 - FY 2025 Strategic Plan, are used as guiding principles 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. 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 include, 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.

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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)
- * Social media total reach and total engagement

C.4. Explain the steps that will be taken if the stated program goals provided in C.3. are not achieved.

Old Salem needs help with funding the re-building of our staff so we can fully reopen our doors. If funds aren't available, we will have to determine if we can operate certain programs without staffing or if they will have to operate at current COVID levels.

We should have no difficulty in achieving our produce and bread goals for next year. Old Salem is fully committed to continuing this important community outreach.

Attach participant/program data sample report



Participant/Program Data Sample Report *Required

CommunityAgencyFunding_Reports_10605_OldSalem-2020_.pdf

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.

Applicants will be reimbursed funds based upon timely submissions of eligible invoices. These invoices should describe services rendered and should align with the goals and objectives cited here. Where outcomes do not align with goals, please be prepared to provide a written summary of shortcomings.

Stated Program Goals	Program Activities in Support of Goals	FY 20-21 Previous Year Results	FY 21-22 Current Year Projected Results	FY 22-23 Next Year Anticipated Results
Old Salem will build back staff	Programming, strategic planning, and recruitment of educators and highly trained staff, commitment to equity and a living wage	New goal	New goal	Bring staff employee number up from 73 to between 100 and 110
Old Salem will fully reopen its doors	Recruitment of highly trained staff, full slate of programming, post-	New goal	New goal	Employee numbers up from 73 to between 100 and 110, programming

	COVID protocols			build back of 30 events and workshops
Old Salem will continue to address food insecurity and support our neighbors in need.	Through our Victory Gardens and bakery, we will continue to grow and distribute nutrient-rich vegetables and fresh baked goods to the community. This will be accomplished in partnership with Second Harvest Food Bank and H.O..P.E of Winston-Salem.	New goal	6,500 pounds of vegetables and 20,574 loaves of bread donated	7,000 pounds of vegetables and 20,775 loaves of bread

	Total Unduplicated Number Served	Total Number Served
FY 20-21 Previous Year Results	8,105	8,105
FY 21-22 Current Year Projected Results	30,000	30,000
FY 22-23 Next Year Anticipated Results	50,000	50,000

C.6. FY 20-21 Program Accomplishments

Due to the COVID-19 pandemic and Old Salem being closed for a good part of the year, our program accomplishments were limited. However, we were able to achieve the following:

- Continued expansion of our digital learning platform through the production of videos, teacher resources, and “live” online events.
- Recruited new staff as part of the new strategic alignment for Learning in Place--Education Coordinators rather than Interpreters.
- Created and implemented new educational programming that focuses on STEAM subjects and meets new visitors’ safety expectations in a post-pandemic world.
- Welcomed K-12 students, teachers, and chaperones for field trip visits before pandemic closure on March 13, 2020.
- Created the new Teacher Advisory Committee (TAC) bringing together teachers from WSFCS, The ASU Academy at Middle Fork, and teacher education professors from ASU, Salem College, and WSSU. The TAC will give input on K-12 educational programming development at OSMG.
- Collaborated with a WFU professor and her students on group projects that focus on OSMG’s Hidden Town Project.
- Presented at WSFCS & NC Government & Heritage Library’s professional development workshop for social studies teachers.
- Partnered on a 3-part lecture series with Dr. Andrew Gurstelle of WFU for a freshman anthropology seminar.

C.7. FY 22-23 Key Objectives

* Rebuild staffing levels from 73 to between 100 - 110.

- * Hire a Curriculum Development teacher to create in-demand STEAM curriculums.
- * Hire additional staff as needed.
- * Provide 30 new events and workshops for next year.
- * Continue to provide produce and bread as an outreach to our community.
- * Restructure our programming to provide both online and in-person events and workshops.

Attach participant/program data sample report

Documentation



Participant/Program Data Sample Report

CommunityAgencyFunding_Reports_10605_OldSalem-2020_.pdf

D. Organizational Capacity

Completed by sbrittain@oldsalem.org on 11/18/2021 10:47 AM

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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, based in Winston-Salem, NC, is an educational history site that invites the community to explore, through innovative, tactile engagement, the Moravian, Black enslaved, freed African American and Cherokee experiences of the town of Salem, NC. The narrative begins in 1766 and continues today. As an organization, Old Salem Museums & Gardens considers its mission to provide content and assistance in ways that fill community needs.

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. We are recognized as a National Historic Landmark and accredited by the American Association of Museums.

Due to the COVID-19 pandemic, Old Salem's major services, programs, and activities have become a hybrid of both online programming and in-person experiences including:

- * educational programs, including online and in-person learning experiences, 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.

FUNCTION (5 POINTS)

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

70+ 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: (We hope to be back to pre-COVID levels sometime in FY 2022 - 2023.)

o Travel and Tourism

o Pre-Covid attracted 440,000 visitors annually, including 45,000 school children. Many of our visitors enjoy other amenities

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9 of 27

(hotels, restaurants, museums, art galleries, athletic events, concerts) offered by the city's businesses and organizations.

- o Pre-Covid generated an annual estimated economic impact of \$48 million.
- o Pre-Covid accounted for an estimated 15,000 room nights, producing an estimated \$3 million in income for city businesses.
- o Pre-Covid brought convention and conference activity (and dollars) to the city.
- o Pre-Covid developed promotional strategies that fostered 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: Once it is safe, 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 and executive staff involved in the proposed project/program.

Position Title	Activities/Inputs	Total Work Hours Per Week	% of hours proposed to be funded
President & CEO	Plans and/or coordinates Old Salem's program through board, staff, and volunteers. Oversees innovative interpretive and educational programs that support the mission. Develops strategies to translate the goals and objectives into action.	40	0.00 %
Chief Operating Officer	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 %
Director of Learning in Place	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 %
Director of	Teams with OSMG departments to develop and foster	40	0.00 %

Community Engagement	relationships within the community organizations, artists, cultural institutions, schools, and colleges, to integrate them into existing programs at the Museum, to develop OSMG Special Community Events/Programing, and to extend opportunities to integrate OSMG into community life.		
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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
Franklin Vagnone	President & CEO	\$175,000.00	0.00 %
Terry Taylor	Chief Operating Officer	\$90,000.00	0.00 %
Michelle M. Cook	Senior Director of Development	\$95,000.00	0.00 %
Tammy Everhart	Controller	\$65,000.00	0.00 %
Daniel Ackerman	Senior Director Curatorial, Research & Archaeology	\$85,000.00	0.00 %

D.6. Attach an organizational chart

Organizational Chart *Required

OSI org chart 12.PC9.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. Best practices for accessing a diverse hiring process and candidate pool include:

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.
- 4) 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 paperwork. 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, as well as the employee's appropriate race/ethnicity and gender identity.

	Male - White	Male - Black	Male - Other	Female - White	Female - Black	Female - Other
Executives/Managers	8	1	0	12	2	1
Professionals	1	1	0	4	0	0
Technicians	0	0	0	0	0	0
Office/Clerical	0	0	0	0	2	1
Laborers/Service Workers	2	1	0	2	2	2
Total Full-Time						

Please enter the total number of **Temporary/Part-Time** Positions (FTE) and Employees you have in the table below, as well as the employee's appropriate race/ethnicity and gender identity.

	Male - White	Male - Black	Male - Other	Female - White	Female - Black	Female - Other
Executives/Managers	0	0	0	0	0	0
Professionals	0	0	0	2	0	0
Technicians	0	0	0	0	0	0
Office/Clerical	0	0	0	1	0	0
Laborers/Service Workers	5	0	0	23	0	2
Total Part-Time/Temp						

D.8.

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

Board of Trustee ROSTER PUBLIC DISTRIBUTION 2021-2022.docx

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

3

ABILITY (5 POINTS)

D.11. If this is an application for new funding, please describe the steps your organization will take to establish an action plan for successful program launch, including appropriate stakeholder training and coordination. Articulate a clear methodology for service delivery within the context of established goals and include a timeline of key action items and approximate dates for delivery.

This is not new funding.

D.12. Describe your organizations' past success with flexibly responding to unforeseen events, which had the potential to negatively impact deliverables. What were best practices learned, if any? How would you successfully use these practices with the proposed program, if necessary?

As the COVID-19 pandemic took hold, Old Salem was able to pivot quickly to online learning and to offer a socially

distanced activity for visitors to the district.

Recognizing the need for more resources that we saw coming because of the pandemic, the Learning in Place Department of Old Salem launched an online Digital Learning Lab platform. The Lab is a curriculum-based, educational program for elementary, middle, and high school students, teachers, and parents learning and teaching from home. The Lab supplements instruction through videos, lesson plans, and other instructional tools that explore core curriculum subjects. Shortly after the start of the COVID-19 pandemic, school systems throughout NC began canceling field trips through at least Fall 2021. As an answer to the cancellation of field trips, Old Salem launched an online virtual field trip experience through our digital platform in February 2021.

Crafted by master teachers and accomplished museum educators, the multi-level Digital Learning Lab also offers classroom

teachers access to our collections and ground-breaking research through Old Salem's and MESDA's expert museum educators and curators.

We also launched the Salem Pathways project which creates a new, hybrid experience that addresses the COVID-19 sanitation and safety best practices, while still providing a compelling experience to increase visitor engagement and is designed to appeal to and accommodate diverse constituents of all ages, interests, and abilities. The content is written at an 8th-grade reading level to ensure accessibility.

Old Salem will continue to be flexible by making our programming both hybrid and online, not only in response to the COVID-19 pandemic but to the high demand across the country for online learning and curriculum. This allows us to reach a vastly larger audience than just in-person learning.

D.13. How does your program's policies/procedures ensure fair treatment, equitable access, and utilization of benefits for all persons, particularly marginalized and underserved groups and communities (i.e., marketing, outreach, eligibility determination and appeals)?

OSMG is committed to hiring, developing, and utilizing diverse talents from around the globe. The institution supports a respectful environment that values those differing skills and perspectives.

E. Cost Effectiveness

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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 21-22	Projected Actuals FY 21-22	Proposed Budget FY 22-23
Program Services	\$3,652,939.94	\$2,773,165.00	\$3,652,940.00
Fundraising	\$316,396.37	\$240,196.00	\$316,396.00
Management and General	\$669,906.69	\$508,567.00	\$669,907.00
Total Expenditures by Program	\$4,639,243.00	\$3,521,928.00	\$4,639,243.00

Expenditures by Category	Budgeted FY 21-22	Projected Actuals FY 21-22	Proposed Budget FY 22-23
Employee Salaries and Wages	\$2,341,035.00	\$2,025,301.00	\$2,341,035.00
Employee Benefits	\$442,676.00	\$363,645.00	\$442,676.00
Facility Rent and Utilities	\$416,143.00	\$321,367.00	\$416,143.00
Training and Conference Registration	\$0.00	\$175.00	\$0.00
Membership and Dues	\$7,704.00	\$6,085.00	\$7,704.00
Travel and Transportation	\$7,346.00	\$2,236.00	\$7,346.00
Grants to Individuals and Organizations	\$0.00	\$0.00	\$0.00
Contracted Fundraising Services	\$0.00	\$0.00	\$0.00
Goods Purchased for Resale	\$440,071.00	\$30,444.00	\$440,071.00
Other Contracted Services	\$258,017.00	\$211,637.00	\$258,017.00
Other Operating Expenditures	\$726,251.00	\$534,717.00	\$726,251.00
Capital Outlay	\$0.00	\$18,175.00	\$0.00
Total Expenditures by Category	\$4,639,243.00	\$3,513,782.00	\$4,639,243.00

Revenues by Category	Budgeted FY 21-22	Projected Actuals FY 21-22	Proposed Budget FY 22-23
City of Winston-Salem	\$197,710.00	\$197,710.00	\$232,000.00
Forsyth County	\$48,500.00	\$100,000.00	\$100,000.00
State of North Carolina	\$0.00	\$100,000.00	\$0.00
Federal Government	\$0.00	\$0.00	\$0.00
Admissions/Program Revenues/Sales	\$2,330,272.00	\$303,469.00	\$2,330,272.00

Memberships	\$413,376.00	\$164,256.00	\$413,376.00
Donations	\$130,200.00	\$114,847.00	\$130,200.00
Foundation Grants	\$69,996.00	\$242,932.00	\$70,000.00
Interest and Investment Income	\$1,316,543.00	\$1,316,543.00	\$1,316,543.00
Parent Organization	\$0.00	\$0.00	\$0.00
Other	\$168,789.00	\$139,887.00	\$168,789.00
Total Revenues by Category	\$4,675,386.00	\$2,679,644.00	\$4,761,180.00

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

Other operating expenses include retail operational expenses and restoration and maintenance expenses.
Other revenue includes retail sales and rental property income.

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
2020	Community	\$197,710.00
2019	Community	\$197,710.00
2018	Community	\$206,520.00
2017	Community	\$175,000.00
2016	Community	\$175,000.00

E.3. Complete the table below to show specific details of proposed City funding and other leveraged funding for the proposed project/program. List each additional funding source for the program.

Activity	Funding Requested from City	Funds from Other Sources	Other Funds Source
General Operating	\$232,000.00	\$0.00	
Operating Support	\$0.00	\$100,000.00	Forsyth County
Operating Support	\$0.00	\$25,000.00	The Arts Council
Learning in Place	\$0.00	\$50,000.00	BB&T/Truist
Victory Gardens/Bread	\$0.00	\$50,000.00	RJ III & MM Reynolds Foundation
	\$232,000.00	\$225,000.00	

E.4. For each activity and line item above, please provide a short but detailed description of how City resources will be used to carry out proposed programming.

Funds from the City will be used for General Operating Support including salaries to hire new staff, a cost of living adjustment, and to provide a living wage.

E.5. Where another stakeholder or agency is providing non-monetary assistance with a particular aspect of your programming, please provide a short description of those activities and how they will supplement the use of City funds.

N/A

E.6. 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 \$232,000, \$34,900 more than last year to be able to offer our employees a cost of living raise and a living wage for teachers we need to hire for our Learning in Place Department. Both of these are critical needs in light of the COVID-19 pandemic to keep our current employees and offer competitive salaries to Learning in Place teachers we hire.

If we don't receive the monies, we will not be able to fully re-open since we won't have a full staff. We will have to continue in Phase III of re-opening indefinitely.

SUSTAINABILITY (7 POINTS)

E.7. Describe the plan to sustain the project/program funding in future years. Include information about other funding sources to leverage City funds requested.

Realistically, until the COVID-19 pandemic has ended, we will need to rethink how we sustain our programs. The majority of funding will come from memberships, donation solicitations, grants, and our endowment. Once we are able to fully reopen, we can begin to offer classes, tours, special events, etc. that will help bring in needed funds.

In addition, 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.

Bakery operations provide a significant level of support for retail operations. However, since the beginning of COVID-19, Old Salem has provided fresh produce and bread to Second Harvest Food Bank and H.O.P.E Winston-Salem free of charge. We have been able to supplement some of our costs through grants and Winkler Bakery has re-opened for retail sales. To date, we have delivered over three tons of food, over 20,500 loaves of bread, cookies, and other baked goods.

Old Salem has a financial plan to reduce its endowment draw by 2022, which may have to be adjusted due to the COVID-19 pandemic and the losses we have sustained. We are hopeful, while we are in the midst of the pandemic, that we can seek additional endowment support through 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.8. Describe any potential programmatic barriers to project implementation (e.g. recruitment or outreach challenges, etc.) and your plans for overcoming them.

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

A new surge of the COVID-19 pandemic would continue to impact our financial situation in a negative way.

E.9. Describe any institutional barriers to project implementation (e.g. staff vacancies, pending departures, etc.) and your plans for overcoming them.

Currently, Old Salem is not fully staffed, which keeps us from a full re-opening. If we aren't able to fill staff vacancies, we will not be able to fully re-open and will have to continue in our Phase III re-opening indefinitely.

AVERAGE COST (5 POINTS)

E.10. 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:	\$232,000
Number proposed to be served for the year:	8,000
Average City funds per beneficiary:	\$24.00
Proposed funds from all sources:	\$225,000
Number proposed to be served for the year:	8,000
Average total funds per beneficiary:	\$23.00

F. Required Documents

Completed by sbrittain@oldsalem.org on 11/16/2021 1:44 PM

Case Id: 14258

Name: Old Salem Museums & Gardens - 2022/23

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 and Annual Statement 2021.pdf

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

2020 990 Public Inspection Copy - no password-1.pdf

Organization By-Laws *Required

OSMG AMENDED AND RESTATED BYLAWS November 2020 FINAL.pdf

Articles of Incorporation *Required

889_Articles of Incorp 1950.pdf

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

892_Old Salem Policies.pdf

IRS 501(c)3 Designation Letter *Required

887_501c3 Letter 1994.pdf

Audited Financial statements or third-party review from 2019 and 2020. *Required

12312020 Old Salem Financial Statements-1.pdf

Printed By: Rene Williams on 2/3/2022

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

***Required**

NC License Certificate 2021-2022.pdf

Participant/Program Data Sample Report *Required

CommunityAgencyFunding_Reports_10605_OldSalem-2020_.pdf

Other

copyroom.shfb@gmail.com_20211116_101916.pdf

Letter of Support_Old Salem_November 2021.pdf

G. Income Based Projects/Services Only

Case Id: 14258

Name: Old Salem Museums & Gardens - 2022/23

Address: *No Address Assigned

Completed by sbrittain@oldsalem.org on 11/15/2021 11:13 AM

G. Income Based Projects/Services 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."

G.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.

Income Range	# 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

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

H. Construction/Rehab Only

Completed by sbrittain@oldsalem.org on 11/16/2021 1:46 PM

Case Id: 14258

Name: Old Salem Museums & Gardens - 2022/23

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."

H.1. Describe the proposed project and provide plans. If the project is approved, we will need a detailed work write-up.

H.2. Provide a projected timeline for the proposed work.

H.3. Describe how the project will be managed, including the contractor procurement process.

H.4. Describe the target market, including any special populations to be served.

H.5. Describe the services or program you plan to provide.

H.6. Describe the property management plan.

H.7. List the development team members.

H.8. Describe the financial capability of the sponsor/owner organization.

H.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	Govt Funding
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Documentation

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

We are not applying for this type of funding.pdf

Participant/program data sample report *Required

We are not applying for this type of funding.pdf

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

We are not applying for this type of funding.pdf

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

We are not applying for this type of funding.pdf

I. Emergency Shelter Only

Completed by sbrittain@oldsalem.org on 11/15/2021 11:13 AM

Case Id: 14258

Name: Old Salem Museums & Gardens - 2022/23

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 11/15/2021 11:14 AM

Case Id: 14258

Name: Old Salem Museums & Gardens - 2022/23

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

K. HOPWA

Completed by sbrittain@oldsalem.org on 11/15/2021 11:14 AM

Case Id: 14258

Name: Old Salem Museums & Gardens - 2022/23

Address: *No Address Assigned

K. HOPWA

Please provide the following information.

Are requesting funds for a HOPWA project?

No

Submit

Completed by sbrittain@oldsalem.org on 11/18/2021 10:47 AM

Case Id: 14258

Name: Old Salem Museums & Gardens - 2022/23

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.

Susan Brittain

Electronically signed by sbrittain@oldsalem.org on 11/18/2021 10:47 AM

IDIS Setup

No data saved

Case Id: 14258

Name: Old Salem Museums & Gardens - 2022/23

Address: *No Address Assigned

IDIS Setup

Please provide the following information.

Project Name

National Objective

Activity Number ID

HUD Activity Code

Project Description

Accomplishment Type

Initial Application Date

Service Area

Ward

Census Tract(s)

Block/Group

MWBE