

## Program Overview

Completed by ujimacdc@gmail.com on 4/18/2022 3:17 PM

**Case Id:** 15219

**Name:** Ujima CDC, Inc. - 2022

**Address:** \*No Address Assigned

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### Program Overview

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Please provide the following information.



City of Winston-Salem  
ARPA Transformational  
Non-Profits Application

City of Winston-Salem  
P.O. Box 2511  
Winston-Salem, NC 27102  
336-727-8000  
[ARPA@cityofws.org](mailto:ARPA@cityofws.org)

This application portal is to request funding from the City of Winston-Salem as part of the Transformational Non-Profits Application Process. Applications received through this portal will only be reviewed by the City of Winston-Salem. Other jurisdictions may have separate application processes. Please contact other jurisdictions (e.g., Forsyth County) for instructions regarding requests to those jurisdictions.

Submitting an application does not guarantee funding. Please see the section below regarding the scoring process. The Mayor and City Council will have final decision-making authority regarding program funding requests.

Non-profit organizations may submit funding requests for capital or operating costs.

#### Minimum Criteria

- Must be registered non-profit organization (includes faith-based organizations providing a public purpose)
- Must have been incorporated as a non-profit for at least one year

#### Scoring Process and Matrix

All completed applications will undergo a review to ensure required documents are attached. Fully completed applications will be reviewed by selected City staff members and scored based on the scoring matrix approved by the Mayor and City Council. [Click here](#) to view the scoring matrix. Scored applications will be reviewed by the City's Management Team for potential recommendation to the Mayor and City Council who will have authority to appropriate funding for programs.

Staff reserves the right to contact any applicant to request clarification or additional details regarding application responses and materials.

## Defining Performance Measures

Sections of the application will reference performance measures and outcomes as required by the U.S. Department of Treasury. Specifically, the application will request workload and effectiveness/outcome measures. Please see this video (<https://www.cityofws.org/2809/Performance-Measures-Video>) for general information on performance measures.

## Upcoming Application Orientation Session

The City will host a virtual application orientation session on April 1, 2022 at 10:00 am. The meeting will take place virtually via the Zoom platform and will also have a live simulcast on the City's YouTube page. The link for that meeting will be posted the morning of the meeting to the website: [www.cityofws.org/clfrf](http://www.cityofws.org/clfrf)

## Contact Information

For any questions or concerns, please email [ARPA@cityofws.org](mailto:ARPA@cityofws.org) or call City Link at 336-727-8000.

## A.Contact Information

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Case Id: 15219

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### A.Contact Information

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Please provide the following information.

#### ORGANIZATION/AGENCY INFORMATION

##### A.1. Organization/Agency Name

Ujima CDC, Inc

##### A.2. Mailing Address

1605 Village Meadow Circle Winston-Salem, NC 27101

##### A.3. Organization Website

ujimacdc.com

##### A.4. Year 501 (c)(3) Status Obtained

2,007

##### A.5. Organization/Agency Fiscal Year

1,231

##### A.6. Federal Tax ID Number

##### A.7. Federal DUNS Number

##### A.8. Federal SAM Registered?

No

#### ORGANIZATION/AGENCY CONTACT INFORMATION

##### EXECUTIVE DIRECTOR

##### A9. First Name

CORETTA

##### A10. Last Name

BIGELOW

##### A11. Title

Executive Director

##### A12. E-mail

ujimacdc@gmail.com

##### A13. Phone Number

(336) 893-6934

##### BOARD CHAIR

##### A14. First Name

Cornelius

##### A15. Last Name

Sadler

##### A16. E-Mail

sandsadler@aol.com

##### A17. Phone Number

(336) 924-7031

##### A18. Term Expiration Date

01/01/2099

## B. General Project Information

Completed by [ujimacdc@gmail.com](mailto:ujimacdc@gmail.com) on 4/25/2022 3:05 PM

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## B. General Project Information

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Please provide the following information.

### PROJECT INFORMATION

#### B.1. Project/Program Title

Emmanuel Retirement Village Phase 2

#### B.2. Project Location/Address

1605 Village Meadow Circle Winston-Salem, NC 27101

### PROJECT CONTACT/MANAGER

#### B3. First Name

Hobart

#### B4. Last Name

Jones

#### B5. Title

Vice President

#### B6. E-Mail

[ujimacdc@gmail.com](mailto:ujimacdc@gmail.com)

#### B7. Phone Number

(336) 978-0062

## C. General Project Narrative

Completed by [ujimacdc@gmail.com](mailto:ujimacdc@gmail.com) on 4/25/2022 3:27 PM

Case Id: 15219

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### C. General Project Narrative

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Please provide the following information.

#### C.1. Provide description of project and how funds will be used

Project (Emmanuel Retirement Village) is currently a 42 unit residential housing retirement community located in City View Neighborhood of Winston Salem, NC. This will be Phase 2 of the project to provide 10 more housing units in the form of 5 residential duplexes.

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

Participants (potential residents) will gain access via grassroots marketing and advertising efforts, social agency referrals, word of mouth, entity board of directors engagement, hand delivery of marketing materials to churches, organizations, the City View Neighborhood Association, referrals from similar type facilities, and radio media focused to the senior community.

#### C.3 Total estimated number of unique participants to be served annually

60

#### C.4. Will program beneficiaries be only residents of Winston-Salem?

No

#### Describe the other areas (counties) that will benefit

Surrounding counties and cities located in the Triad and Piedmont area

#### Estimate the percentage of beneficiaries that will be residents of Winston-Salem

99.00 %

#### TOTAL FUNDING REQUEST

##### C.5. Total Operating Funding Request

\$1,500,000.00

##### C.6. Total Capital Funding Request

\$1,500,000.00

#### SPENDING TIMEFRAME

##### C.7 Capital Spending Timeframe

6 months

##### C.8 Operating Spending Timeframe

6 months



## D. Project Budget Categories

Completed by [ujimacdc@gmail.com](mailto:ujimacdc@gmail.com) on 4/25/2022 3:45 PM

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### D. Project Budget Categories

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Please provide the following information.

Use templates below to input **the total** Project Budget (**only requested expenses and estimated revenues related to the program or project for which you are requesting funding**) by clicking **Add Column**. Please include all funding from the City and other sources.

Operating Costs	Total
Project Management and Marketing	\$25,000.00
Attorney fees (closing, recording, etc.)	\$6,500.00
Development and Architectural/Engineering Fees	\$24,753.00
	\$56,253.00

Capital Costs	Total
Project Construction Costs	\$1,496,864.00
Project Contingencies	\$59,875.00
	\$1,556,739.00

### PROJECT/PROGRAM REVENUE CATEGORIES

Please fill out the revenue estimate table. **Note: operating revenues and expenses must be balanced (be equal).**

Operating	Total
Rent Receipts	\$56,253.00
	\$56,253.00

Please list below all known/expected **individual** grants and contributions totaling 10% or more of the project's budget.

**Note: capital revenues and expenditures must be balanced (be equal)**

Capital	Total
Bank Refinancing	\$1,556,739.00
	\$1,556,739.00

## E. Demographic and Geographic Distribution

Case Id: 15219  
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### E. Demographic and Geographic Distribution

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Please provide the following information.

Demographic distribution is an assessment of the level of the project funds spent on a program or service provided at a physical location in a Qualified Census Tract (QCT), OR where the primary intended beneficiaries live within a QCT, OR whether the program benefits residents that earn less than 60 percent of median income for the City, OR whether over 25 percent of program beneficiaries are below the federal poverty line.

E.1 Is this project/program located in a QCT or serve residents that live in a QCT?

Yes

If yes, what percentage of clients served are estimated to be residents of QCTs? ([Click here](#) to view the QCT mapping tool)

96.00 %

E.2 If the project or program is not a QCT or specifically serve residents in a QCT, will residents meet the follow criteria:

25% or more of participants below the federal poverty line or participants served make less than 60% of the Area Median Income

The project/program does not operate in a QCT, and beneficiaries neither reside in a QCT nor meet the income thresholds mentioned above.



## F. Alignment to Strategic Plan

Completed by [ujimacdc@gmail.com](mailto:ujimacdc@gmail.com) on 4/25/2022 4:03 PM

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## F. Alignment to Strategic Plan

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Please provide the following information.

Strategic planning is a process in which organizational leaders determine their goals and objectives, and allocate needed/limited resources to successfully achieve those goals and objectives. [Click here](#) to view Winston Salem's Strategic Plan. The Strategic Plan includes three (3) tiers of priorities:

### Tier 1:

- Focus on job creation/sustainability and workforce development
- Collaboration and funding for pre-K opportunities
- Funding for affordable housing
- Funding for economic development

### Tier 2:

- Poverty reduction/cessation
- COVID reopening plan
- Community engagement (Power of connections)
- Funding for arts

### Tier 3:

- Community Fundraising
- Environmental initiatives
- Address digital divide
- Address childcare needs
- Neighborhood maintenance
- Organization efficiency and public-private partnerships
- Law enforcement reform

**F.1. Please select the primary priority from the list above addressed by your project/program.**

Tier 1

**F.2. Please select the secondary priority from the list above addressed by your project/program.**

Tier 2

**F.3. Please describe how the workload or outcomes from your project/program addresses the primary priority you**

**selected.**

Phase 2 of this project will provide additional housing that create an environment that preserves the health, safety and well-being of under-served senior residents in the City View and neighboring communities in the eastern and northeastern parts of Winston Salem. Ujima is building a strong and vibrant community of choice that enhance family life by providing quality safe housing.

## G. Collaboration

Completed by [ujimacdc@gmail.com](mailto:ujimacdc@gmail.com) on 4/25/2022 4:58 PM

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### G. Collaboration

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Please provide the following information.

**Collaboration is when an organization is partnering or proactively working with one or more external stakeholders to achieve the same goal.**

**G.1. How many other external partners, organizations, stakeholders will you be collaborating with to provide the project/program?**

3+

**G.2. Please provide the names of the organizations and the roles they will serve in the project/program?**

Winston Salem Foundation - financial support and collaboration, First National Bank - loans and goal achievement, SG Atkins CDC, Inc. - operational guidance and support, and Emmanuel Baptist Church - initial capital support (land) and organizational support.

## H. Administration/Reporting

Completed by ujimacdc@gmail.com on 4/25/2022 4:18 PM

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### H. Administration/Reporting

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Please provide the following information.

Per U.S. Treasury rules and associated guidance, the City's framework for using these funds aligns with specific administrative reporting requirements. The administration/reporting criterion has three core elements: 1) the organization's/project's development of clear performance indicators and measurable outcomes, 2) the use of evidence-based interventions, 3) and the City's evaluation of organization and project risk.

#### H.1. Please clearly define the workload and outcome measures that are associated with your project/program

Workload	Construction of 5 duplex building, providing 10 residential units
Effectiveness/Outcome	5 Completed Duplex Building fully leased

#### H.2. Does the project/program use evidence-based interventions?

No

H.3. For transparency purposes, the risk matrix is attached. This is NOT required, however, you can self-assess if you wish. Please fill out and upload the [Risk Matrix](#).

Risk Matrix

UJIMA RISK ASSESSMENT.xlsx

# I. Capacity

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## I. Capacity

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Please provide the following information.

**An organization's capacity can be defined as its ability to implement the proposed project, as characterized by the alignment of its mission and vision with the proposed project, existing internal infrastructure to support it, and its plan for implementation and assessment of project success.**

**I.1. Please provide your organization's vision and mission statements and explain the alignment between the proposed project/program and the organizational mission.**

The Mission of Ujima CDC is to build a strong and vibrant community of choice and to enhance family life by providing quality housing, offering enriching child development programs, and promoting employment opportunities. This Phase 2 project will deepen that commitment to quality housing to under served residents.

**I.2. Describe the organization's current infrastructure and capacity to deliver the program services or complete the project. Include any relevant current programming and experience providing similar services.**

Ujima's current infrastructure is a governing body of a 12 member board of directors. One of the board members (Hobart Jones) serves as the Retirement Village operating officer and assistant property manager. He is assisted by the executive director who serves as property manager, board liaison, and financial manager.

**I.3. Describe the program/project implementation plan. Include any known barriers to success and how those will be overcome**

Ujima plans to begin construction of the designated Phase 2 units by April 26, 2022 and complete construction by October 3, 2022. Currently, there is a waiting list for intended 10 units to be constructed. Barriers to the success of construction would be weather related restrictions and supply chain issues. These barriers would be overcome by extended construction completion date.

**I.3a. Describe the program assessment plan including how the data will be collected for selected performance metrics and any other evaluation tools that will be used to determine program/project success.**

Ujima currently collects data on the existing 42 units providing financial data, rent roll reporting, tenant demographics to the City of Winston Salem as well as financial partners.

## J. Impact/Community Need

Completed by ujimacdc@gmail.com on 4/25/2022 4:45 PM

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### J. Impact/Community Need

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Please provide the following information.

**Impact/Community needs concern whether or not the proposed project will address an identified need within the community and what the short term (One year) and long term (3 years) impact of this project will be**

**J1. Describe the identified community need for this project/program. Cite specific data or studies/reports that have identified this as a community need.**

This project will address the housing shortage for senior residence that is experienced throughout the low to moderate income areas. Particularly housing needs in a safe and secure community.

**J2. Describe the short-term impacts of the project/program and how they align with the community need identified above.**

Short term impact is providing housing units immediately to the area.

**J3. Describe the long-term impacts of the project/program and how they align with the community need identified above.**

Long term impact is that most of the current tenants in Phase 1 of the project considers this Retirement Village their forever home and all except 1 of the original tenants of the initial duplexes are on going into year 4 of their lease agreements.

**J4. Referencing previous section on outcomes, describe how the impacts noted above will be measured.**

Impact will be measured by the tenants satisfaction and long term commitment to residency.

## K. Funding Stability

Completed by [ujimacdc@gmail.com](mailto:ujimacdc@gmail.com) on 4/25/2022 4:47 PM

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### K. Funding Stability

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Please provide the following information.

Funding stability is an assessment of both the organization's annual funding and the planned funding mechanism for the project/program from grants, donations, sales, and other income generators. To the extent possible, the City wishes to ensure applying entities have sustainable funding sources outside the City's ARPA allocation. An entity will be deemed as having superior funding stability if it demonstrates at least three years of sustainable grant, contribution, and/or fee-based revenues to cover operating costs. The entity must also demonstrate commitments from other organizations to cover the full cost of project deficits or future-year operating costs (in combination with realistic fee-based revenue assumptions).

**K.1. Have your organization's operating revenues covered operating expenses the last three years?**

Yes

**K.2. Approximately what percentage of your organization's total budget is covered by competitive grants that you must re-apply for?**

0.00 %

**K.3. What percentage of your project/program's budget is covered by City ARPA funds as part of this request?**

0.00 %

**K.4. Please provide narrative on funding for this program after City ARPA funding has been exhausted.**

Funding will provided through lease income.

**K.5. Please attach commitment letters from other organizations showing financial support for the project/program.**



Commitment Letters

*\*\*No files uploaded*

## L. Representation

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### L. Representation

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Please provide the following information.

**Representation deals with how diverse an organizations leadership is compared with community demographics, which includes Winston-Salem's race/ethnic backgrounds as well as gender. Local non-profit organizations should reflect the communities they serve. Since organizations are requesting to receive ARPA funding through the City, we must ensure these entities hold themselves accountable to having diverse staff and leadership panels**

**L.1. Provide a list of board members including the race, ethnicity, and gender identification for each member.**

Name	Race	Ethnicity	Gender Identification
Cornelius Sadler	Black	Black	Male
Hobart Jones	Black	Black	Male
William Reeves	Black	Black	Male
Pearline Howard	Black	Black	Female
Gloria Milner	Black	Black	Female
Albert Porter	Black	Black	Male
Barbara Lee	Black	Black	Female
Annita Joy Samuel	Black	Black	Female
John Brown	Black	Black	Male
Donald L. Scales	Black	Black	Male
Donna K. Clagget	Black	Black	Female



## M. Required Documents

Completed by ujimacdc@gmail.com on 4/25/2022 4:58 PM

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### M. Required Documents

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Please provide the following information.

For North Carolina Secretary of State - Current and Active Status, [Click Here](#)

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### Documentation

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**Code of Conduct/Conflict of Interest Policy \*Required**

Ujima CDC Policies and Procedures Manual 8-9-12 Approved Version.doc



**Copy of the agency's latest 990 Form as submitted to the Internal Revenue Service \*Required**

FYE Audited Statement - 2020.pdf



**Organization By-Laws \*Required**

UJIMA CDC Bylaws.pdf



**Articles of Incorporation \*Required**

Articles of Incorporation.pdf



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

Ujima CDC Policies and Procedures Manual 8-9-12 Approved Version.doc



**IRS 501(c)3 Designation Letter \*Required**

501(c)3 Letter.pdf

**Most recent audited financial statements or a third-party review \*Required**

FYE Audited Statement - 2020.pdf

**North Carolina Secretary of State - Current and Active Status \*Required**

NC Sec State Status 11-2018.pdf

## N. Submit

Completed by [ujimacdc@gmail.com](mailto:ujimacdc@gmail.com) on 4/25/2022 4:58 PM

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**Address:** \*No Address Assigned

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## N. Submit

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Please provide the following information.

I certify that all information entered into this application is true.

Hobart L Jones

Electronically signed by [ujimacdc@gmail.com](mailto:ujimacdc@gmail.com) on 4/25/2022 4:58 PM

04/25/2022