Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: A Helping Hand

Street Address: 1502 West NC Highway 54, suite 405

Mailing Address: 1502 West NC Highway 54, suite 405

Website Address: www.ahelpinghandnc.org

Executive Director: Jennifer Ashley

Telephone: 919-403-5555 E-Mail: jennifer.ashley@ahelpinghandnc.org

Contact Person: Jennifer Ashley

Telephone: 919-403-5555 E-Mail: jennifer.ashley@ahelpinghandnc.org

Fax: 919-969-7015 Federal ID Number: 56-1923835

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$ 3,100	$ 15,000
Summary of intended use of funds: Provide non-medical independent living services for senior citizens and adults with disabilities, regardless of their ability to pay. Services include escorted "door-through-door" transportation, in-home assistance including light housekeeping and meal preparation, companionship, and respite care. We have added an exciting new Geriatric Care Coordination program whereby we will be able to organize care for clients and assist with resources in the community. Services enhance quality of life, promote self-sufficiency, and prevent premature transitions to higher levels of care. Assistance affords individuals the opportunity to remain active and to safely "age in place."		
Town of Chapel Hill	$ 5,000	$ 10,000
Summary of intended use of funds: Provide non-medical independent living services for senior citizens and adults with disabilities, regardless of their ability to pay. Services include escorted "door-through-door" transportation, in-home assistance including light housekeeping and meal preparation, companionship, and respite care. We have added an exciting new Geriatric Care Coordination program whereby we will be able to organize care for clients and assist with resources in the community. Services enhance quality of life, promote self-sufficiency, and prevent premature transitions to higher levels of care. Assistance affords individuals the opportunity to remain active and to safely "age in place."		

Town of Carrboro	$ 3,100	$ 10,000
Summary of intended use of funds: Provide non-medical independent living services for senior citizens and adults with disabilities, regardless of their ability to pay. Services include escorted "door-through-door" transportation, in-home assistance including light housekeeping and meal preparation, companionship, and respite care. We have added an exciting new Geriatric Care Coordination program whereby we will be able to organize care for clients and assist with resources in the community. Services enhance quality of life, promote self-sufficiency, and prevent premature transitions to higher levels of care. Assistance affords individuals the opportunity to remain active and to safely "age in place."		

Executive Director

Carol Kelly

Board Chair

1/22/2015

Date

1/22/2015

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: July 27, 1995 in Chapel Hill, NC

   b. Years in Operation: 20 years

   c. Mission or Vision Statement (if applicable): Promote self-sufficiency, quality of life, and the highest level of independence for older adults and individuals with disabilities.

   d. Brief History of Agency:

      Cathy Ahrendsen founded A Helping Hand (AHH) in 1995 in response to an unmet community need for high caliber senior support services. We are honored to have grown from serving 21 individuals in 1995 to now providing support to nearly 420 individuals annually. A Helping Hand's success remains rooted in our vision of excellence for all people. Many seniors are unable to pay market rates for services; however, by utilizing volunteers and grant funding A Helping Hand is able to provide vital assistance to people of all income levels.

      AHH offers an innovative response to age-related limitations by providing a person-centered approach to care that meets the varying needs of seniors. AHH provides companionship services, in-home assistance, door-through-door transportation, and respite care. Services enhance quality of life, promote self-sufficiency, and prevent premature transitions to higher levels of care. Assistance affords individuals the opportunity to remain active and to safely "age in place." Key needs addressed by A Helping Hand include: a) Improving accessibility to health care; b) mental stimulation and socialization; c) promoting exercise and mobility; d) encouraging proper nutrition; e) maintaining a safe home environment; f) respite for caregivers; and g) patient advocacy.

      In 2015 we are excited to be able to add to our continuing care model by offering Geriatric Care Coordination for existing and new AHH clients. This is a holistic approach to working with older adults, which provides clients and their families with advocacy and the coordination of resources necessary to remain independent as long as possible without sacrificing their safety and quality of life.

      Today, as in 1995, the agency remains fully committed our founder's vision of helping senior citizens and individuals with disabilities safely "age in place" while maintaining the highest level of independence.

2. Describe the identified community need(s) the Program(s) funded will address.

*This community needs description applies to both program 1 – Companion Care and program 2 – Geriatric Care Coordination.

As the population of seniors (65+) increases exponentially, an expansion of services is required to meet the special needs of this at-risk demographic. In 2013, one in 5 North Carolina residents were 60 and over in the state. In 2033, one in four will be over 60 and over. According to the US Census Bureau, there are approximately 13,962 individuals aged 65+ in Orange County; nearly 10% of these individuals are living at or below poverty level and are unable to afford independent living services. This augmented population of seniors is resulting in an increased demand for services on an already heavily burdened human services system. In order to reduce the public cost of caring for these individuals, it is necessary to provide services that allow a person to "age in place" with minimal barriers to service. A Helping Hand (AHH) is the only non-profit in Orange County that provides in-home assistance regardless of an individual's ability to pay.

Transportation is frequently identified as the number one unmet need for seniors. In fact, the 2012 Orange County Health Assessment identified the lack of transportation services as a primary barrier to healthcare access. Fortunately, AHH is able to increase access to healthcare and other valuable services by filling gaps in current transportation models. As current community transportation exists, assistance is limited to "door-to-door" and is subject to geographical and scheduling restrictions. AHH's escorted "door-through-door" transportation is critical to ensuring physically-disabled or cognitively-impaired seniors are able to travel safely to doctor's appointments and have access to other vital needs, regardless of time and location in the County. Moreover, the discrepancy between life expectancy and driving expectancy creates a pragmatic need for senior transportation services. On average, men and women experience respectively, seven and ten non-driving years. Ironically, as the ability to drive decreases, the frequency of medical appointments and the need for health services increases.

The natural aging process often brings about physical and cognitive limitations that require assistance in the home. The DHHS Administration on Aging reports 37% of older people are limited by a disability. Moreover, in the future, the percentage of disabled individuals is also expected to grow. A report published in JAMA Internal Medicine, showed that the proportion of baby boomers who are disabled is substantially higher relative to people from two decades ago in the same age bracket. Without assistance, these individuals will experience premature transitions to higher, more expensive levels of care and are at increased risk for injury and illness. Providing independent living services will enable these individuals to maintain self-sufficient lives and will reduce the likelihood of injury from performing unmanageable household tasks.

Social isolation among the elderly is a silent and often overlooked pandemic threatening the health and quality of life of our community's older adults. According to the American Community Survey, over 3,300 Orange County seniors over age 65 live alone. Many of these individuals are geographically isolated from their families and lack necessary support networks. A 2012 report in the Archives of Internal Medicine

found 43% of older adults reported feelings of loneliness which can lead to depression, other negative psychological impacts, loss of physical functioning, and even premature death. Lonely adults in the study were 45% more likely to die than seniors who felt meaningful connections with others. AHH's companionship services provide an increased opportunity for socialization and mental stimulation.

Families are the major provider of long-term care in America. Adult children, aging spouses and individuals are often caught unprepared for the eventualities of aging. Not being fully informed about the choices and resources available to seniors can have disastrous physical, emotional and financial impacts. Not to mention organizing the myriad of services needed to successfully 'age in place'. That is why the role of the Geriatric Care Coordinator is vital in providing these services. However, the upcoming generation of seniors, the baby boomers, will have a difficult time affording the services of Geriatric Care Coordination, with market rate services ranging from $95 to $150 per hour. A recent HSBC Report reveals that Boomers only have enough savings for two-thirds of their retirement.

As reported in the 2012 Recommendations from the Governor's Advisory Council on Aging, failure to sustain, if not increase, funding for senior services could have serious adverse effects on the well-being of the elderly and the public cost of caring for them. Funding from the Town of Chapel Hill, the Town of Carrboro and Orange County is essential to ensuring A Helping Hand is able to respond to the growing needs of Orange County senior citizens.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

   Program 2 – Geriatric Care Coordination:
   We have added a Director of Care Coordination to our staff. A 30 hour position charged with the oversight and implementation of our Care Coordination service. This is an expanded offering for A Helping Hand.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

   *Many of these revenue sources will apply to both program 1 – Companion Care and program 2 – Geriatric Care Coordination.

   A Helping Hand ensures financial solvency through diverse internal and external revenue sources that include grants, donations, community partnerships, and client fees. The table below provides anticipated revenues for the upcoming fiscal year.

Direct Support		
Foundation Grants		
Home Health Foundation	$20,000	Ongoing
Fox Family Foundation	$8,000	Ongoing
Mary Goddard Pickens Foundation	$11,000	Ongoing
The Faile Foundation	$10,000	Ongoing
The Crane Foundation	$6,000	New
Government Grants		
Orange County Outside Agency Funding	$35,000	Ongoing
Durham County	$25,000	Ongoing
Contributions		
Annual Appeal	$15,000	Ongoing & New
Chapel of the Cross	$2,000	Ongoing
Duke Community Care Fund	$5,000	Ongoing
Strowd Roses	$5,000	Ongoing
Trinity Avenue Presbyterian	$2,000	Ongoing
Miscellaneous	$10,000	Ongoing & New
Indirect Public Support		
SECC	$1,600	Ongoing
Client Fees		
	$448,105	Ongoing & New
Total Revenue		$ 601,705

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

* These community partnerships apply to both program 1 – Companion Care and program 2 – Geriatric Care Coordination.

Community collaborations and partnerships are instrumental to meeting the needs of our community's seniors. A Helping Hand is actively engaged in collaborative efforts to make Orange County the premier place to grow older and participates in a number of partnerships, committees and initiatives, including:

- Orange County Department on Aging
- Orange County Long-Term Care Learning Collaborative
- Chatham-Orange Community Resource Connections for Aging and Disabilities Committee

- Outreach Network for Consumers and Providers
- Patient Advocacy and Transitions Committee
- Chatham Health and Eldercare Senior Services
- Durham Partnership for Seniors

AHH regularly refers clients to, and receives referrals from:

- The Orange County Department on Aging
- Orange County Department of Social Services
- Orange County Health Department
- UNC Hospitals
- Veteran's Administration
- Meals on Wheels
- Local physicians, social workers, and clinics

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

In an effort to educate a diverse demographic about the services provided by AHH, we participate in an assortment of informational resource fairs, health fairs, and make presentations to low-income housing developments and local faith communities. We seek to affiliate ourselves with a variety of community partners to enhance the diversity of clientele. These affiliations include the Chatham-Orange Community Resource Connection, the Orange County Department on Aging, Orange County Department of Social Services, Veteran's Administration, UNC Hospitals, Meals on Wheels, and local healthcare providers.

AHH actively recruits diverse companions from various backgrounds. Many are fluent in a foreign language, including Spanish, Mandarin, Russian, and French. By building a diverse companion base, AHH is better able to pair clients with companions who share common interests.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition			X	X
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation			X	X
Housing				
Other			X	X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
A minimum of 25 Orange County residents will receive subsidized assistance.	Provide companionship, escorted "door-through-door" transportation, in-home assistance including light housekeeping and meal preparation, and respite care.	AHH provided 38 Orange County residents with services that helped individuals maintain quality of life and independence; increased access to health and human services; reduced social isolation; and, promoted physical and mental wellbeing.	Regular recording and tracking of service delivery.
A minimum of 360 hours of subsidized assistance will be provided to Orange County residents.	Provide companionship, escorted "door-through-door" transportation, in-home assistance including light housekeeping and meal preparation, and respite care.	AHH provided 1379 hours of service* to Orange County residents with services that helped individuals maintain quality of life and independence; increased access to health and human services; reduced social isolation; and, promoted physical and mental wellbeing. (*not fully funded by Orange Co.)	Regular recording and tracking of service delivery.
80% of program participants will remain in their homes or active in assisted living.	Provide companionship, escorted "door-through-door" transportation, in-home assistance including light housekeeping and meal preparation, and respite care.	95% of program participants were able to continue living independently in their own homes.	Living arrangements and status of independence is monitored on an ongoing basis.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
A minimum of 30 Orange County residents will receive subsidized assistance.	Provide companionship, escorted "door-through-door" transportation, in-home assistance including light housekeeping and meal preparation, and respite care.	Requested funding will allow AHH to provide 30 Orange County residents with services that help individuals maintain quality of life and independence; increase access to health and human services; reduce social isolation; and, promote physical and mental wellbeing.	Regular recording and tracking of service delivery.
A minimum of 550 hours of subsidized assistance will be provided to Orange County residents.	Provide companionship, escorted "door-through-door" transportation, in-home assistance including light housekeeping and meal preparation, and respite care.	Requested funding will allow AHH to provide 2200 hours of service to Orange County residents with services that help individuals maintain quality of life and independence; increase access to health and human services; reduce social isolation; and, promote physical and mental wellbeing.	Regular recording and tracking of service delivery.
80% of program participants will remain in their homes or active in assisted living.	Provide companionship, escorted "door-through-door" transportation, in-home assistance including light housekeeping and meal preparation, and respite care.	85% of program participants will be able to continue living independently in their own homes.	Living arrangements and status of independence is monitored on an ongoing basis.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: A Helping Hand - Companion Care Program

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 50,000	$ 50,000	$ 40,000	-20%
Program Generated Revenue (fees)	$ 505,722	$ 448,105	$ 469,060	5%
Local Government Grants:				
Orange County	$ 2,000	$ 3,100	$ 12,000	287%
Town of Chapel Hill	$ 4,000	$ 5,000	$ 8,000	60%
Town of Carrboro	$ 2,000	$ 3,100	$ 8,000	158%
Other Local: Durham County	$ 12,000	$ 15,000	$ 23,000	53%
Other Local:	$ -	$ -		0
Other Local:	$ -	$ -		0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 160	$ 160	$ 160	0%
State Government	$ -	$ -		0
Federal Government	$ -	$ -		0
Other Grants:	$ -	$ -		0
Other Grants:	$ -	$ -		0
Miscellaneous/Other Revenue	$ 51,390	$ 50,000	$ 50,000	0%
Please list 3 largest Miscellanous sources:				
ary Goddard Pickens Foundatic $ 11,000.00				
Fox Family Foundation $ 8,000.00				
Faile Foundation $ 10,000.00				
Total Program Revenue	**$604,882.00**	**$574,465.00**	**$ 610,220**	**6%**
PROGRAM EXPENSES				
Compensation	$ 409,801	$ 414,280	$ 414,280	0%
Rent & Utilities	$ 25,058	$ 30,000	$ 27,000	-10%
Supplies & Equipment	$ 10,083	$ 10,000	$ 9,000	-10%
Travel & Training	$ 457	$ 1,000	$ 900	-10%
Other Expenses:	$ 64,140	$ 71,195	$ 67,500	-5%
Please list 3 largest "Other Expenses":				
Insurance $ 19,000.00				
Mileage Reimbursement $ 15,000.00				
Payroll Taxes $ 37,195.00				
Total Program Expenses	**$ 509,539**	**$ 471,550**	**$ 518,680**	**10%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 95,343**	**$ 102,915**	**$ 91,540**	**-11%**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: A Helping Hand - Geriatric Care Coordination Program

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ -	$ -	$ 10,000	0
Program Generated Revenue (fees)	$ -	$ -	$ 30,940	0
Local Government Grants:				
Orange County	$ -	$ -	$ 3,000	0
Town of Chapel Hill	$ -	$ -	$ 2,000	0
Town of Carrboro	$ -	$ -	$ 2,000	0
Other Local: Durham County	$ -	$ -	$ 2,000	0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -	$ -	$ -	0
State Government	$ -	$ -	$ -	0
Federal Government	$ -	$ -	$ -	0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ -**	**$ -**	**$ 49,940**	**0**
PROGRAM EXPENSES				
Compensation	$ -	$ -	$ 30,000	0
Rent & Utilities	$ -	$ -	$ 3,000	0
Supplies & Equipment	$ -	$ -	$ 1,000	0
Travel & Training	$ -	$ -	$ 100	0
Other Expenses:	$ -	$ -	$ 7,500	0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Program Expenses	**$ -**	**$ -**	**$ 41,600**	**0**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ 8,340**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]:

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	23,308	23,308	471,550	20.23
Estimated FY14-15	24,473	24,473	489,500	20.00
Projected FY15-16	14,003	14,003	448,105	32.00

Defining a Unit of Service[+]

One hour of service to an individual client.

Section V: Program Beneficiary Demographics

f you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: We are seeking to serve the same clients with the Companion Care Program and Geriatric Care Coordination Program.

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	49	51	60	Durham City	82	83	85
Female	177	180	200	Durham County	0	0	0
2. **Ethnicity**				Raleigh City	5	5	5
African-American	33	35	50	Wake County	4	4	4
Caucasian	188	190	200	Town of Chapel Hill	105	107	110
Hispanic	2	3	5	Town of Carrboro	16	17	26
Other	3	3	5	Orange County	10	11	26
3. **Age**				Other (specify)	4	4	4
0-5 Years	0	0	0				
6-18 Years	0	0	0	Per cent of clients at, or below, federal poverty level	35%	36%	40%
19-50 Years	16	16	30				
51+ Years	210	215	230				
Unknown	-			***TOTAL # OF CLIENTS SERVED***	226	231	260

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: A Helping Hand

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 50,000	$ 50,000	$ 50,000	0%
Agency Generated Revenue (fees)	$ 505,722	$ 448,105	$ 500,000	12%
Local Government Grants:				
Orange County	$ 2,000	$ 3,100	$ 15,000	384%
Town of Chapel Hill	$ 4,000	$ 5,000	$ 10,000	100%
Town of Carrboro	$ 2,000	$ 3,100	$ 10,000	223%
Other Local: Durham County	$ 12,000	$ 15,000	$ 25,000	67%
Other Local:	$ -	$ -		0
Other Local:	$ -	$ -		0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 160	$ 160	$ 160	0%
State Government	$ -	$ -		0
Federal Government	$ -	$ -		0
Other Grants:	$ -	$ -		0
Other Grants:	$ -	$ -		0
Miscellaneous/Other Revenue	$ 51,390	$ 50,000	$ 50,000	0%
Please list 3 largest Miscellanous sources:				
ary Goddard Pickens Foundati $ 11,000.00				
Fox Family Foundation $ 8,000.00				
Faile Foundation $ 10,000.00				
Total Agency Revenue	**$604,882.00**	**$574,465.00**	**$ 660,160**	**15%**
AGENCY EXPENSES				
Compensation	$ 409,801	$ 414,280	$ 444,280	7%
Rent & Utilities	$ 25,058	$ 30,000	$ 30,000	0%
Supplies & Equipment	$ 10,083	$ 10,000	$ 10,000	0%
Travel & Training	$ 457	$ 1,000	$ 1,000	0%
Other Expenses:	$ 64,140	$ 71,195	$ 75,000	5%
Please list 3 largest "Other Expenses":				
Insurance $ 19,000.00				
Mileage Reimbursement $ 15,000.00				
Payroll Taxes $ 37,195.00				
Total Agency Expenses	**$ 509,539**	**$ 471,550**	**$ 560,280**	**19%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 95,343**	**$ 102,915**	**$ 99,880**	**-3%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: A Helping Hand/ Program 1 = Companion Care, Program 2 = Geriatric Care Coordination

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1.00	90(1) 10 (2)	38,065	55,000	55,000	9%	N/A
Program Director	1.00	90 (1) 10 (2)	37,548	38,065	38,065	6%	N/A
Finance Director	1.00	90 (1) 10 (2)	30,239	36,500	36,500	6%	N/A
Client Services Director	.875	90(1) 10(2)	23,705	28,510	28,510	5%	N/A
Program Assistant	1.00	100 (1)	38,052	29,110	29,110	5%	N/A
Companions	12	100 (1)	221,154	235,000	240,000	42%	N/A
Volunteers	2.24	100 (1)	0	0	0	0%	N/A
Director of Care Coordination	.875	100 (2)	0	0	30,000	5%	N/A
Field Supervisor	1.00	100 (1)	0	27,040	27,040	4%	N/A
Administrative Assistant	.50	90 (1) 10(2)	0	22,000	22,000	3%	N/A

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Institute of Art Therapy, Inc. (DBA: The Art Therapy Institute)

Street Address: 200 North Greensboro St., Suite D-6, Carr Mill Mall, Carrboro, NC 27510

Mailing Address: 200 North Greensboro St., Suite D-6, Carr Mill Mall, Carrboro, NC 27510

Website Address: www.ncati.org

Executive Director: Kristin Linton

Telephone: 919-381-6068 E-Mail: kblinton@ncati.org

Contact Person: Kristin Linton

Telephone: 919-824-7587 E-Mail: kblinton@gmail.com

Fax: _____ Federal ID Number: 26-3447555

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	**$0**	**$5000**
Summary of intended use of funds: No current funding from Orange County Government. ATI is requesting $5,000 from Orange County Government to supplement work currently being done throughout the county and specifically to support growing numbers of clients moving out of the town limits where there are currently fewer resources for this population.		
Town of Chapel Hill	**$2000**	**$5000**
Summary of intended use of funds: Currently our funding level from the Town of Chapel Hill is $2000. ATI is requesting $5,000 from the Town of Chapel Hill. This will increase our ability to serve a greater number of uninsured clients as well as clients throughout Chapel Hill that can benefit from the services. We serve a large number of students in the Chapel Hill schools, and could serve more with funding. Funding will also support supervision and evaluation of programs.		
Town of Carrboro	**$3000**	**$5000**
Summary of intended use of funds: Currently our funding level from the Town of Carrboro is $3000. ATI is requesting $5,000 from the Town of Carrboro. This will increase our ability to serve a greater number of uninsured clients. We serve a large number of students in the Carrboro City schools, as well as an increasing number of clients in the community.. Funding will also support supervision and evaluation of these programs.		

_____	_____
Executive Director	Board Chair
_____	_____
Date	Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:

Sept. 18, 2009

   b. Years in Operation:

The Art Therapy Institute (ATI) began providing counseling services in the Triangle Area in 2006 under another fiscal agent, and became an independent 501(c)(3) in 2009. We have been in operation for 9 years.

   c. Mission or Vision Statement:

Mission Statement: The Art Therapy Institute is an organization of mental health professionals dedicated to the healing power of the arts. We provide clinical art therapy services to diverse populations, empowering clients to develop their identities through the art-making process. We also offer training to allied professionals and seek to raise awareness in the general community about our profession and the benefits of art therapy.

Vision Statement: We envision a world where the universal healing power of the arts is experienced and valued.

Key Beliefs/Core Values

- **Access:** We advocate that mental health services should be available to all who need them.
- **Client Centered**: Our work is guided by the unique needs of each client.
- **Healing**: All that we do is directed toward health, wholeness and creating the space for healing.
- **Empowerment**: We support clients in finding their own paths and professionals whose research is consistent with our mission.
- **The Arts:** We believe that everyone has the ability to be creative.

- **Community**: We seek always to be inclusive: in defining the creative process; in working with other professionals; and in engaging the broader community.
- **Professional**: We are accountable for meeting the highest standards of training, competency and ethics.
- **Hope**: We affirm the inherent power of people to find their own strength and develop their own aspirations.
- **Compassion**: We relate to others through caring and kindness, nurturing and devotion, sharing our joys and challenges.

d. Brief History of Agency:

The Art Therapy Institute (ATI) began providing counseling services in the Triangle Area in 2006 and became an independent 501(c)(3) in 2009. Now serving clients primarily in Chapel Hill, Carrboro and Durham, ATI utilizes art therapy to help improve the physical, mental, and emotional well-being of individuals of all ages. ATI's masters-level clinicians provide community-based services and improve access to mental health services for underserved populations. ATI currently serves the following populations through our diverse programs: refugees from Burma, general ESL newcomers, children with intellectual and physical disabilities, adults with mental illness, children receiving bone marrow transplants or treatment for cancer and blood disorders, elderly patients with Alzheimer's and dementia, and general art therapy referrals from community members. By approaching mental health issues through the healing components of the arts, ATI provides support that is culturally sensitive to a wide range of populations and prevents the need for more intensive interventions. In addition, ATI works to build the field of art therapy in the southeast by providing training and education through workshops, internships, and volunteer opportunities for students and professionals interested in learning more about art therapy.

2. **Describe the identified community need(s) the Program(s) funded will address.**

The Art Therapy Institute contributes to the health and well-being of the growing population of refugees from Burma as well as other places in the Chapel Hill and Carrboro area as well as Durham through the Burma Art Therapy Project. ATI provides counseling services for children and adolescents in schools, adult refugees at a local community health center, and adult women through refugee support groups in the community. The services provided by ATI helps our clients succeed in school, acculturate to North Carolina, and enrich their communities. Refugees who have received services have become strong community leaders and initiated religious projects at their churches and temples to help build and maintain their community.

The services ATI provides are based on the expressed needs of the community. The Burma Art Therapy Project began as a response to requests for assistance from the Chapel Hill and Carrboro schools. The art therapy programming for this population stems from the clinicians' formal training and research done with similar communities. The population of refugees from Burma in Orange County has grown considerably in the past decade. It is difficult to determine the exact number due to refugees moving between counties and states, but there have been over 700 newly arrived refugees, primarily from Burma, to Orange County in the past 8 years.

Studies of refugee children indicate that up to 40% may have psychiatric disorders, including post-traumatic stress disorder (PTSD), depression, anxiety-related difficulties, sleep problems, conduct disorder, attention problems, generalized fear, over-dependency, hyperactivity, difficulties in peer relationships, and separation anxiety (Hodes, 2000). Art therapy has proven an important and effective modality for the refugee population, circumventing the language barrier and safely addressing post-traumatic stress symptoms (Rousseau, Drapeau, Lacroix, Bagilishya & Heusch, 2005). Research has

also suggested that art therapy allows children to develop positive relationships with their therapists, can be used to alleviate negative psychosocial consequences of childhood trauma, and offers a way for children to communicate grief and loss (Eaton, Doherty & Widrick, 2007; Orr, 2007). ATI's work also improves cross-cultural awareness and supports social and cultural enrichment for the refugee population, and for the greater Chapel Hill and Carrboro community through outreach and art shows.

Funding will support ATI's continued evaluation of art therapy used in schools, and initiation of evaluation in other refugee therapy groups. This grant would help fund time spent by clinicians collecting, managing, and analyzing data, without compromising time spent doing art therapy with clients. Evaluation will not only allow us to track our impact, but also to improve our services.

In addition to existing groups, funding will support our new vocational groups for adolescents and young adults. Our work in these groups integrates art with practical skills, focusing on educational and career counseling, life skills, job readiness, and communication skills. Finally, we have been asked by both the Chapel Hill/Carrboro City Schools as well as the Durham Public Schools to increase our referral base to include the large number of newcomers from other countries, many of them undocumented, in the ESL programs. We have a unique ability to serve these students, as well as a solid reputation and performance record to provide these services. We have expanded our work this year by nearly 100 additional students, which include many of these students from other countries, and expect continued referrals from this expanding client base.

3. **Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.**

Currently, the Burma Art Therapy Project serves many uninsured students, as well as students in small groups with both private and grant funding supporting these programs. With additional funding in FY 2015-16, the Art Therapy Institute would expand its services to reach a greater number of refugees from Burma living in the community. In addition, we've been asked to expand our services to many newcomer students from all over the world, currently in ESL programs in school. Both the Chapel Hill/Carrboro City Schools have reached out to ATI to expand our art therapy service model to include this greater "newcomer" population. With increased funding through this grant, ATI would be able to serve more children and adults by offering additional school and community-based art therapy groups and individual therapy. Funding would be used to support group therapy a method with unique benefits to our clients. Small groups promote community support, aid in-group acculturation and mentorship, and utilize shared experiences as a strength to foster growth.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

The Art Therapy Institute is pursuing long-term revenue sources through annual fundraisers, grant funding, corporate sponsorship, and continued private donations. This year, we have been contracted as a group to provide services through NC Health Choice and Cardinal Innovations, so we are able to utilize our in house therapists to serve these clients and bill through ATI. This model will increase our sustainability, as well as our ability to take additional, insured, new referrals. In addition, ATI has been credentialed to provide continuing education for mental health professional and, clinicians provide a spring and fall workshop series which generates funding for programming. ATI is also working to expand our in-house art therapy programming to build sustainability. Finally, and perhaps most importantly, over the past year and a half, we have contracted with Executive Service Corp, through a

grant by the Triangle Community Foundation to undergo Board Development, Strategic Planning, and Executive Coaching. These processes have tremendously impacted our organization through a strengthened mission and increased board leadership. We continue to grow in a thoughtful and sustainable manner and are actively utilizing the resources and community around us to strengthen and guide ATI.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

The Art Therapy Institute recently received a $3000 grant from The Linking Communities (TLC) Project (based out of Washington, DC) to create and implement a new initiative in 2015 which uses art therapy to increase positive visibility of newcomers within their communities. ATI will work with adolescent newcomers in the Chapel Hill/Carrboro City Schools and the Durham Public Schools to engage in a process called "Public Narrative." This process will incorporate arts-based interventions and storytelling to empower newcomers to tell their strengths-based stories to their greater communities. This project solidifies continuing and growing partnerships with local school districts, as well as helps to develop a stronger partnership with Transplanting Traditions, a refugee-run local farm, which will provide food for the culminating art show.

Beyond this new initiative, the Art Therapy Institute has ongoing partnerships with numerous local organizations. Below is a list of organizations that have a direct impact on the Burma Art Therapy Project.

Cardinal Innovations

Cardinal Innovations Healthcare Solutions is a managed care organization currently covering 2.4 million individuals in North Carolina. Cardinal Innovations manages all Medicaid, state and local funding for mental health, intellectual and developmental disability, and substance use/addiction services in our covered areas. Cardinal Innovations provides access to high quality services through a comprehensive network of more than 1,100 of the best providers across the state. They are a community-focused organization with a history of sustained partnerships with consumers, local stakeholders and elected officials designed to create quality solutions for people who rely on the public system for care. Cardinal Innovations contracts with ATI to provide services to many of our clients who have Medicaid. In addition, they also provide a stipend for our work at the Carrboro Community Health Center, a women's group and some translation services.

The Carrboro Community Health Carrboro Community Health Center/Piedmont Health

The Carrboro Community Health Center is one of three Piedmont Health centers in Orange and Chatham counties in North Carolina. It provides comprehensive health services and education to all segments of the community, with special emphasis on vulnerable populations who have inadequate health care or lack access to health care services. The Center strives for integrated and comprehensive care by providing medical, dental, pharmaceutical, nutritional, and related health services. The Carrboro Community Health Center refers clients to ATI, signs medical service orders for art therapy, and provides space for ATI to provide individual art therapy for adults one day a week.

Chapel Hill-Carrboro City Schools

The Health Coordinator for the Chapel Hill-Carrboro City Schools, the Director of the Exceptional Needs Program, and the Director of the ESL Department serve as ATI's primary contacts within the

schools and are all referral sources for ATI. The Health Coordinator sought out an alternative individual and group therapy service for the refugee students because their needs were intensive and translation services were difficult. The Health Coordinator, the ESL Director, the Exceptional Children's Program Director, school counselors, ESL and EC teachers, and social workers are all dedicated to partnering with ATI for continued service to the students in the school system.

Durham Public Schools

The ESL Director at the Durham Public Schools invited ATI to a newly formed refugee coalition of providers in Durham. Here ATI quickly became a prominent voice and strong community partner. At the end of 2014, we received our first contract with DPS to run art therapy groups with their growing newcomers student population in which they are seeking additional outside resources and services. We are excited to begin this partnership.

Kiran

Kiran is a multi-cultural, non-religious, community-based South Asian organization in Chapel Hill, NC, that promotes the self-reliance and empowerment of South Asian women and men. The organization focuses on domestic violence prevention and crisis services, and provides outreach, peer support, and referrals for South Asian individuals. ATI has referred clients to their services.

Refugee Health Coalition

The Refugee Health Coalition was formed in Orange County, North Carolina to bring together the Orange County Health Department, social service providers, schools, two local healthcare systems, and four resettlement agencies. The coalition provides a forum for community members and stakeholders to discuss concerns among the area's refugee population, particularly Burmese and Karen residents. ATI

clinicians attend the Refugee Health Coalition meeting each month to keep up-to-date on refugee health issues and to receive support from other organizations that work with refugees.

UNC Gillings School of Global Public Health

The UNC Gillings School of Global Public Health is an accredited program that prepares students to be researchers, practitioners, and leaders in global public health, with a year of practice focused on community partnerships to promote the health of North Carolina residents. The Department of Health Behavior creates pathways for students to support and learn from community organizations. A team of master's students from the Department of Health Behavior has worked with ATI on creating a sustainable evaluation for the Burma Art Therapy Project. Two of our former interns, now MPH Graduates from UNC, now serve on our Board, and continue to help with the research and evaluation of our Burma Project work as well.

UNC School of Social Work

The UNC School of Social Work is an accredited program that prepares social workers to work in fields related to poverty, mental health, violence, and substance abuse. The School of Social Work has a strong history of collaboration with North Carolina counties and populations and places master's students in internships and practica with human service agencies, schools, and other public and nonprofit organizations within the state. ATI has had interns from the School of Social Work, and has hosted conferences and held art shows in the school.

NC State Counselor Education Program

The Counselor Education Program at North Carolina State University has had a long and rich history of contributing to the needs of North Carolina and the nation. Founded in 1946 with the appointment of Professor Roy Anderson, the Counselor Education Program functioned largely as a one person

enterprise with a focus on occupational information and guidance. The Counselor Education Program has collaborated with ATI for placement of master's students in internships and practica. ATI has had interns from this program as well, and has hosted conferences and guest lectured in classes affiliated with this program.

US Committee for Refugees and Immigrants

The Raleigh office of the US Committee for Refugees and Immigrants (USCRI) is a community partner that has been instrumental in working with ATI to identify needs of refugees in the area. The NC field office was established in 2007 to help refugees build new lives in North Carolina. "Each year, USCRI NC welcomes refugees who have fled violence and persecution from places like Burma, Cuba, Somalia, Sudan, and Vietnam. USCRI NC works to bring hope and opportunity to the lives of refugees and immigrants by defending human rights, promoting self-sufficiency, and forging community partnerships. USCRI NC focuses on meeting the immediate basic needs of new arrivals, assisting refugees in obtaining early employment and achieving self-sufficiency, and nurturing community integration for new Americans." – USCRI. ATI has run art therapy groups in conjunction with USCRI in Raleigh, NC.

6. **How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?**

The Burma Art Therapy Project serves one of the primary ethnic and minority groups in Chapel Hill/Carrboro. ATI collaborates with community members for translation of materials and for interpretive services. ATI is also active in the refugee community, attending and holding events that welcome the community and benefit community development. ATI clinicians attend monthly Refugee Health Coalition meetings in order to interface with other professionals serving this community. In addition, with the expansion of services, we have begun to reach out to an even larger diverse

community, and continue to learn about each culture's customs and mores to continue to serve as a culturally competent and sensitive model to therapy.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition	X	X	X	X
Job Training	X	X		
Sports and Arts Activities	X	X	X	X
Pre-School Activities				
After-School Activities				
Mentoring	X			
Transportation				
Housing				
Other	X	X		

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
50% of participating children will suffer fewer symptoms of one or more of the following: PTSD, depression and anxiety	Individual and group art therapy sessions with trained clinicians	60% of participating children suffered fewer symptoms of anxiety. 50% of participating children suffered fewer symptoms of depression.	Hopkins Symptoms Checklist, Diagnostic Drawing Series

25% increase in classroom attendance	Individual and group art therapy sessions with trained clinicians	47% of participating children had decreased emotional difficulties in the classroom. 17% had fewer classroom conduct problems. 40% had fewer symptoms of hyperactivity and inattention. 43% had fewer problems with peers. Overall, 60% of children had fewer total difficulties in the classroom. While we were unable to take direct attendance measurements we believe less problems in the classroom lead to better attendance and better experience while attending.	Strengths and Difficulties Questionnaire
50% of school clients retained in art therapy	Collaboration with school social workers and teachers, children and families	90% of school clients were retained in art therapy.	Art therapy records, attendance
50% of participating students will have increase in self-esteem	Individual and group art therapy sessions with trained clinicians	Overall, 57% of participating students reported improved self-concept (also referred to as self esteem). In detail, 47% of participating students had improvements in behavioral adjustment, 60% of participating students had increased in feeling freedom from anxiety, 43% of participating students reported increased popularity, and 43% of participating students reported increased happiness.	Piers Harris Self Concept Scale

If program(s) did not meet its stated goal(s), please explain:

The Art Therapy Institute is incredibly proud of the success in client outcomes over the 2013-2014 year. We saw decreases in depression, anxiety, and classroom difficulties in the majority of our clients. We have been able to maintain continuity and contact with a population that often loses insurance coverage and life stability. Despite only being able to see our clients for 14-20 weeks (instead of 24-36 weeks) because of scheduling difficulties with the school system we have been able to meet our organizational and therapeutic goals. We feel that even with the remarkable accomplishments of the Art Therapy Institute, if re-funded, we will be able to continue to document decreases in depression, anxiety, and classroom difficulties, meaning that these school children will be better able to learn and thrive in the classroom.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
By follow-up of the BATP program, ATI clinicians will have delivered art therapy sessions to 210 students participating in BATP, as measured by # of students in session notes kept by ATI staff.	Individual and group art therapy sessions with trained clinicians.	ATI clinicians will have delivered sessions to 210 students	Session notes filed by clinicians indicating the number of students participating in the individual and group art therapy sessions delivered.
From baseline to follow-up, 40% of participating children will suffer fewer symptoms of depression, as measured by total number of symptoms on the Hopkins-Symptom Checklist-25.	Individual and group art therapy sessions with trained clinicians.	40% of participating children will suffer fewer symptoms of depression	Hopkins Symptoms Checklist
From baseline to follow-up, 50% of participating children will suffer fewer symptoms of anxiety, as measured by total number of symptoms on the Hopkins-Symptom Checklist-25.	Individual and group art therapy sessions with trained clinicians.	50% of participating children will suffer fewer symptoms of anxiety	Hopkins Symptoms Checklist
From baseline to follow-up, 40% of participating children will experience fewer emotional difficulties, as measured by total number of emotional difficulties on the Strengths and Difficulties Questionnaire.	Individual and group art therapy sessions with trained clinicians.	40% of participating children will experience fewer emotional difficulties	The Strengths and Difficulties Questionnaire

From baseline to follow-up, 40% of participating children will experience fewer peer difficulties, as measured by total number of emotional difficulties on the Strengths and Difficulties Questionnaire.	Individual and group art therapy sessions with trained clinicians.	40% of participating children will experience fewer peer difficulties	The Strengths and Difficulties Questionnaire
From baseline to follow-up, 40% of participating children will report greater happiness, as measured by total number of happiness items on the Piers-Harris Self-Concept Scale.	Individual and group art therapy sessions with trained clinicians.	40% of participating children will report greater happiness	Piers-Harris Self-Concept Scale
From baseline to follow-up, clinicians will deliver a post-traumatic growth scale to 40% of participating children, as measured by Activity Log indicating the number of students participating.	Individual and group art therapy sessions with trained clinicians.	40% of participating children will report indicators of post-traumatic growth	Session notes indicating the number of students participating in the individual and group art therapy sessions delivered.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Institute of Art Therapy, Inc.

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 2,500	$ 3,500	$ 4,500	29%
Program Generated Revenue (fees)	$ 5,000	$ 15,000	$ 35,000	133%
Local Government Grants:				
Orange County			$ 5,000	0
Town of Chapel Hill		$ 2,000	$ 5,000	150%
Town of Carrboro		$ 3,000	$ 5,000	67%
Other Local:				0
Other Local: Duke Community Grant	$ 2,500			0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Open Meadows Foundation	$ 750			0
Other Grants: Tides Foundation	$ 4,600			0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
Total Program Revenue	**$ 15,350**	**$ 23,500**	**$ 54,500**	**132%**
PROGRAM EXPENSES				
Compensation	$ 13,215	$ 17,000	$ 46,000	171%
Rent & Utilities	$ 2,100	$ 2,100	$ 2,350	12%
Supplies & Equipment	$ 500	$ 1,800	$ 2,000	11%
Travel & Training			$ 1,500	0
Other Expenses:		$ 2,206	$ 2,206	0%
Please list 3 largest "Other Expenses":				
Liability Insurance				
$ -				
$ -				
Total Program Expenses	**$ 15,815**	**$ 23,106**	**$ 54,056**	**134%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (465)**	**$ 394**	**$ 444**	**13%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: The Art Therapy Institute defines one unit of service as 45 minutes of therapy for individual or group per client.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	(45 clients x 20 weeks=800) + (25 clients x 14 weeks=350) =1150	1035/1150=90%	15,815	$15.28
Estimated FY14-15	(40 individual clients x 26 weeks= 1040) + (145 group clients x 16 weeks = 2320) =3360	3024/3360=90%	23,106	$7.64
Projected FY15-16	(50 individual clients x 26 weeks= 1300) + (160 group clients x 20 weeks = 3200) =4500	4050/4500=90%	54,056	$13.35

*Estimated Unit Costs went up because our total length of school year we have been able to see the students has become universally shortened due to longer startup length at the start of the year (partially due to seeing more students), and earlier ending time at end of year due to testing and such. We have learned to be more realistic about start up times and closing out times that work best within the school setting.

*Met goals is defined as completed one course of therapy

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: The Burma Project

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	51	100	120	Durham City	0	41	65
Female	19	85	90	Durham County			
2. **Ethnicity**				Raleigh City			
African-American				Wake County			
Caucasian				Town of Chapel Hill	43	76	75
Hispanic		71	96	Town of Carrboro	24	65	65
Other	70	114	114	Orange County	3	3	5
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years	62	174	195	Per cent of clients at, or below, federal poverty level	80%	80%	80%
19-50 Years	8	11	15				
51+ Years							
Unknown				***TOTAL # OF CLIENTS SERVED***	70	185	210

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Institute of Art Therapy, Inc.**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 20,598	$ 19,000	$ 19,000	0%
Agency Generated Revenue (fees)	$ 63,593	$ 76,000	$ 82,000	8%
Local Government Grants:				
Orange County			$ 5,000	0
Town of Chapel Hill	$ 1,500	$ 2,000	$ 5,000	150%
Town of Carrboro	$ 2,000	$ 3,000	$ 5,000	67%
Other Local: Strowd Roses	$ 2,000	$ 5,000	$ -	-100%
Other Local: Durham Arts Council	$ 523			0
Other Local: Open Meadows Foundation	$ 750			0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Tides Foundation	$ 4,600			0
Other Grants: Linking Communities Grant			$ 3,000	0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
Total Agency Revenue	**$ 95,564**	**$ 105,000**	**$ 119,000**	**13%**
AGENCY EXPENSES				
Compensation	$ 70,875	$ 85,900	$ 97,000	13%
Rent & Utilities	$ 8,400	$ 8,400	$ 9,400	12%
Supplies & Equipment	$ 5,286	$ 2,300	$ 2,300	0%
Travel & Training			$ 1,500	0
Other Expenses:	$ 2,456	$ 7,362	$ 7,500	2%
Please list 3 largest "Other Expenses":				
Liability Insurance $ 2,206.00				
Computer $ 1,556.00				
Total Agency Expenses	**$ 87,017**	**$ 103,962**	**$ 117,700**	**13%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 8,547**	**$ 1,038**	**$ 1,300**	**25%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Art Therapy Institute, Inc.

Position Titles * = Position Vacant	Full Time Equivalent** **	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director/Art Therapist	.5		13,205	21000	22,000	18.5%	
Program Director/Art Therapist	.5		3075	18000	22,000	18.5%	
Art Therapists (4 at .75 time)=	3	0	45,695	49600	53,000	44.5%	
Board Members (10, Volunteer)							
Interns (10, Volunteer)							
Volunteers (approximately 25 annually)							
*These numbers only include monies that actually run through ATI. Some of our contracts bill directly to the clinicians.							
Volunteer hours (from ALL above) /1960=	3.06						

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Big Brothers Big Sisters of the Triangle**

Street Address: 808 Aviation Parkway, Suite 900, Morrisville, NC 27560

Mailing Address: same as above

Website Address: www.bbbstriangle.org

Executive Director: Kim Breeden

Telephone: 919-850-9772 E-Mail: kbreeden@bbbstri.org

Contact Person: John Mitterling, Chief Development Officer

Telephone: 919-850-9772 E-Mail: jmitterling@bbbstri.org

Fax: 919-850-9774 Federal ID Number: 56-2109717

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$2,000	$6,000
Summary of intended use of funds: Funds are requested to support our Community-Based and School-Based Mentoring Programs in Orange County for children ages 6-14.		
Town of Chapel Hill	$2,000	$6,000
Summary of intended use of funds: Funds are requested to support our Community-Based and School-Based Mentoring Programs in the Town of Chapel Hill for children ages 6-14.		
Town of Carrboro	$1,350	$3,000
Summary of intended use of funds: Funds are requested to support our Community-Based and School-Based Mentoring Programs in the Town of Carrboro for children ages 6-14.		

Kim Breeden

Executive Director

1/22/2015

Date

Sharon A Hill

Board Chair

1/22/2015

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 10/26/1998

   b. Years in Operation: A Big Brothers Big Sisters agency has operated here for 16 years. BBBST, which is the result of a merger of two BBBS agencies, has operated here for 9 years.

   c. Mission or Vision Statement (if applicable): Our mission is to provide children facing adversity with strong and enduring professionally supported one-to-one relationships that change their lives for the better, forever.

   d. Brief History of Agency: The first Big Brothers Big Sisters of America affiliate in the Triangle area was incorporated in 1998 to serve the city of Raleigh. In October 2005, the Big Brothers Big Sisters affiliate in Raleigh merged with the YMCA Big Brothers Big Sisters of Durham and Orange Counties to form Big Brothers Big Sisters of the Triangle, Inc. We have the hard data to prove that our mentoring helps children increase self-esteem, overcome adversity, improve school behavior and academic performance and avoid risky behaviors, like drug use and truancy. National research shows that after 18 months of spending time with their Bigs, Littles, when compared to those children not in our programs, were 46% less likely to begin using illegal drugs, 27% less likely to begin using alcohol, 33% less likely to hit someone and 52% less likely to skip school. We partner with parents/guardians, volunteers and others in the Triangle to help ensure our children are successful in school and in life. Specifically, we hold ourselves accountable for each child in the program achieving higher aspirations, greater confidence and better relationships; avoiding risky behaviors; and enhancing their educational success.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

   The number of youth living in poverty in the Triangle has increased substantially, along with increases in juvenile crime, school dropout rates, childhood obesity and other related health and social problems. There are more than 40,000 at-risk youth living below federal poverty lines in the Triangle – most are minorities from single-parent households. Children, who live in our highest crime-ridden neighborhoods, attend our most struggling schools, who become victims of violence and abuse, and/or who have

an incarcerated parent are exponentially more at risk for "falling through the cracks." BBBST operates in the belief that, inherent in every child, is the ability to succeed and thrive in life. These children need positive role models to show them hope for a brighter future – mentors help them achieve this.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

We continue to aggressively seek new funding sources to mitigate the impact of unexpectedly losing the third year of a major federal grant as we did in 2012. We are down three full-time program staff positions and one part-time position due to attrition, but will not staff back up until we have secured additional funding. That means the caseload of every remaining program staff member has increased. So it takes longer to match a child with a mentor and support and service that relationship. We currently have a list of about 200 children waiting to be matched with a mentor. We offer our services free of charge to parents and their children so we must fundraise to cover all program costs. Currently, each match costs approximately $1,500 per year.

Since we offer our services free of charge to parents and their children, we must fundraise to cover all program costs. The average cost of $1,500 per match is derived from these components: trained staff to enroll, interview, match and support mentoring relationships (our largest cost); trainings provided to parents and mentors; liability and property insurance; program activities; BBBSA affiliation dues; AIM fees and Criminal background checks for volunteers/mentors.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

We are very grateful that several local family foundations, many of whom wish to remain anonymous, continue to provide annual support to BBBST. Several financial foundations have provided ongoing funding for more than 5 years, including Bank of America, PNC, Wells Fargo and Genworth. The United Way of the Greater Triangle has increased its support in the last year and provides support each year. Many corporations provide us with ongoing support, including Walmart, UPS, ICAP and Cargill. We are constantly seeking new funding sources; our Board of Directors and staff work hard to bring in new sponsors, especially those that will provide ongoing support. We hold several annual fundraising events that continue to remain successful: the fall Big Night Ball gala, the February Bowl for Kids' Sake event, and our annual Swing for Kids' Sake Golf Tournament. Because we don't charge parents and children for our services, we must reach out to foundations, corporations, governmental entities, individuals and others for funding to pay for all program costs.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- North Carolina Department of Public Instruction, which supports our efforts to help at-risk children;
- North Carolina Department of Juvenile Justice;
- Capital Area Teen Court;
- Durham Housing Authority and the Housing Authority of Wake Counties;
- Teens Climb High Pregnancy Prevention Program in Chapel Hill;
- JD Lewis Community Center in Raleigh;
- Passage Home in Raleigh;
- YMCA of Chapel Hill-Carrboro;
- Area Boys & Girls Clubs;
- Communities in School;
- School Districts of Orange, Durham and Wake Counties;
- Leadership and staff of Orange, Durham and Wake Counties;
- Leadership, staff and students at North Carolina Central University, Duke University, the University of North Carolina at Chapel Hill and North Carolina State University;
- Numerous African-American and Multi-Ethnic Churches in the community.
- National African-American fraternities: Kappa Alpha Psi, Alpha Phi Alpha and Omega Psi Phi.
- Haven House in Raleigh

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

We continue to target African-American males as a priority in volunteer recruitment, working with the three African-American fraternities identified above. The partnership with the United Way African-American Leadership Council, a philanthropic leadership initiative for African-American men and women with hundreds of members throughout the Triangle, has also produced good results. Through the agency's 100 Men in 100 Days Campaign, a partnership was established with the Park West Barbering School, helping to maximize recruitment efforts among African-American men and providing supplemental services to the agency. Lastly, we also have an active partnership with Watts Chapel Baptist Church in Raleigh and Kings Park International Church in Durham (with African-American and multi-ethnic congregations).

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	x			
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring	x			
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Average match Length (AML) for Community-Based Mentoring will meet or exceed 22 months.	BBBST staff carefully screens, trains, matches and supports Bigs to ensure matches last 12 months or more. That's because studies show it takes 12 months or more for the mentoring relationship to make a significant impact on the child's academic success and social behavior.	AML for Community-Based Mentoring was 24.4 months.	Big Brothers Big Sisters of America has designed and built the Agency Information Management System (AIM) that provides tools for agencies to implement and measure mentoring programs. BBSST staff records data on each match in AIM to capture reach, demographic info and outcomes.
Average match Length (AML) for Site-Based Mentoring will meet or exceed 18 months.	BBBST staff carefully screens, trains, matches and supports Bigs to ensure matches last 12 months or more. That's because studies show it takes 12 months or more for the mentoring relationship to make a significant impact on the child's academic success and social behavior.	AML for Community-Based Mentoring was 22.2 months.	Big Brothers Big Sisters of America has designed and built the Agency Information Management System (AIM) that provides tools for agencies to implement and measure mentoring programs. BBSST staff records data on each match in AIM to capture reach, demographic info and outcomes.
The Match Closure Rate will remain below 40%.	BBBST staff carefully screens, trains, matches and supports Bigs to ensure matches last 12 months or more. That's because studies show it takes 12 months or more for the mentoring relationship to make a significant impact on the child's academic success and social behavior.	Match Closure Rate was 22%.	Big Brothers Big Sisters of America has designed and built the Agency Information Management System (AIM) that provides tools for agencies to implement and measure mentoring programs. BBSST staff records data on each match in AIM to capture reach, demographic info and outcomes.

At least 60% of the children matched with mentors (Bigs) will experience improved grades.	BBBST staff carefully screens, trains, matches and supports Bigs to ensure matches last 12 months or more. That's because studies show it takes 12 months or more for the mentoring relationship to make a significant impact on the child's academic success and social behavior.	66% of the children matched in a one-to-one mentoring relationship experienced improved grades.	Big Brothers Big Sisters of America has designed and built the Agency Information Management System (AIM) that provides tools for agencies to implement and measure mentoring programs. BBSST staff records data on each match in AIM to capture reach, demographic info and outcomes.
At least 60% of the children matched with mentors (Bigs) will experience less involvement in risky behaviors.	BBBST staff carefully screens, trains, matches and supports Bigs to ensure matches last 12 months or more. That's because studies show it takes 12 months or more for the mentoring relationship to make a significant impact on the child's academic success and social behavior.	83% of the children matched in a one to one mentoring relationship experienced less involvement in risky behaviors.	Big Brothers Big Sisters of America has designed and built the Agency Information Management System (AIM) that provides tools for agencies to implement and measure mentoring programs. BBSST staff records data on each match in AIM to capture reach, demographic info and outcomes.
At least 50% of the children matched with a mentor (Big) will experience improved social acceptance.	BBBST staff carefully screens, trains, matches and supports Bigs to ensure matches last 12 months or more. That's because studies show it takes 12 months or more for the mentoring relationship to make a significant impact on the child's academic success and social behavior.	50% of the children matched in a one to one mentoring relationship experienced improvement in social acceptance.	Big Brothers Big Sisters of America has designed and built the Agency Information Management System (AIM) that provides tools for agencies to implement and measure mentoring programs. BBSST staff records data on each match in AIM to capture reach, demographic info and outcomes.

If program(s) did not meet its stated goal(s), please explain:

Established goals, for the indicated service areas, were achieved.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
BBBST will serve 850 children within the designated service areas of Wake, Durham and Orange Counties.	BBBST staff carefully screens, trains, matches and supports Bigs to ensure appropriate pairing of mentors (Bigs) and Mentees (Littles); establishing match goals based on self-reported information from the program participants and any relevant external resources (e.g., counselor/therapist, references, former volunteer experience). BBBST staff also provide supplemental activities, trainings and opportunities for all program participants (actively in one-to-one mentoring relationships and those awaiting a match).	Established goal will be achieved.	Big Brothers Big Sisters of America has designed and built the Agency Information Management System (AIM) that provides tools for agencies to implement and measure mentoring programs. BBSST staff records data on each match in AIM to capture reach, demographic info and outcomes.
Average match Length (AML) for Community-Based Mentoring will remain at or exceed 24 months.	BBBST staff carefully screens, trains, matches and supports Bigs to ensure matches last 12 months or more. That's because studies show it takes 12 months or more for the mentoring relationship to make a significant impact on the child's academic success and social behavior.	Established goal will be achieved.	Big Brothers Big Sisters of America has designed and built the Agency Information Management System (AIM) that provides tools for agencies to implement and measure mentoring programs. BBSST staff records data on each match in AIM to capture reach, demographic info and outcomes.
Average match Length (AML) for Site-Based Mentoring will remain at or exceed 22 months.	BBBST staff carefully screens, trains, matches and supports Bigs to ensure matches last 12 months or more. That's because studies show it takes 12 months or more for the mentoring relationship to make a significant impact on the child's academic success	Established goal will be achieved.	Big Brothers Big Sisters of America has designed and built the Agency Information Management System (AIM) that provides tools for agencies to implement and measure mentoring

	and social behavior.		programs. BBSST staff records data on each match in AIM to capture reach, demographic info and outcomes.
50% of children will report improvement in social acceptance.	BBBST staff carefully screens, trains, matches and supports Bigs to ensure matches last 12 months or more. That's because studies show it takes 12 months or more for the mentoring relationship to make a significant impact on the child's academic success and social behavior.	Established goal will be achieved.	The Youth Outcome Survey is administered by our staff twice a year to Littles. Staff members ask Littles a set of 32 questions related to the youth's feelings of self-esteem, their academic performance and attitudes, delinquent behaviors and drug use, and their relationships family and other caring adults. As social acceptance is critical to improving a child's self-esteem, it can have a dramatic impact on academic performance and behaviors in and out of the classroom.
60% of children will report they improved or remained constant in their belief that missing school is a risky behavior to avoid.	BBBST staff carefully screens, trains, matches and supports Bigs to ensure matches last 12 months or more. That's because studies show it takes 12 months or more for the mentoring relationship to make a significant impact on the child's academic success and social behavior.	Established goal will be achieved.	The Youth Outcome Survey is administered by our staff twice a year to Littles. Staff members ask Littles a set of 32 questions related to the youth's feelings of self-esteem, their academic performance and attitudes, delinquent behaviors and drug use, and their relationships family and other caring adults. As social acceptance is critical to improving a child's self-esteem, it can have a dramatic impact on academic performance and behaviors in and out of the classroom.

Our Agency Information Management system (AIM) automatically records the Average Match Length based on the number of matches made, the length of the relationship at time of closure. We are reporting averages because that is our national standard and the official parameters that are recorded in our database.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: _____

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 120,000	$ 125,000	$ 125,000	0%
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 2,000	$ 2,000	$ 6,000	200%
Town of Chapel Hill	$ 2,000	$ 2,000	$ 6,000	200%
Town of Carrboro	$ 500	$ 1,350	$ 3,000	122%
Other Local: _____				0
Other Local: _____				0
Other Local: _____				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 10,000	$ 10,000	$ 10,000	0%
State Government				0
Federal Government				0
Other Grants: _____				0
Other Grants: _____				0
Miscellaneous/Other Revenue	$ 69,000	$ 65,150	$ 67,000	3%
Please list 3 largest Miscellanous sources:				
Annonymous Funders $ -				
_____ $ -				
_____ $ -				
Total Program Revenue	**$ 203,500**	**$ 205,500**	**$ 217,000**	**6%**
PROGRAM EXPENSES				
Compensation	$ 185,000	$ 187,000	$ 198,000	6%
Rent & Utilities				0
Supplies & Equipment	$ 6,000	$ 6,000	$ 6,000	0%
Travel & Training	$ 6,000	$ 6,000	$ 6,000	0%
Other Expenses:	$ 6,500	$ 6,500	$ 7,000	8%
Please list 3 largest "Other Expenses":				
_____ $ -				
_____ $ -				
_____ $ -				
Total Program Expenses	**$ 203,500**	**$ 205,500**	**$ 217,000**	**6%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: one child matched with a mentor in Orange County

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	122	110	$203,500	$1,850
Estimated FY14-15	123	112	$205,500	$1,835
Projected FY15-16	158	133	$217,000	$1,632

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Big Brothers Big Sisters of the Triangle: Community and Site Based Mentoring

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	414	492	497	Durham City	288	293	295
Female	375	427	419	Durham County	3	4	4
2. **Ethnicity**				Raleigh City	269	268	265
African-American	622	666	689	Wake County	104	108	125
Caucasian	71	60	58	Town of Chapel Hill	86	81	108
Hispanic	47	49	50	Town of Carrboro	19	20	25
Other	49	30	53	Orange County	17	22	25
3. **Age**				Other (specify)	3	3	3
0-5 Years							
6-18 Years	789	805	850	Percent of clients at, or below, federal poverty level (qualification for free/reduced lunch)	72	73	73
19-50 Years							
51+ Years							
Unknown				***TOTAL # OF CLIENTS SERVED***	789	805	850

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Big Brothers Big Sisters of the Triangle, Inc.**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 340,000	$ 400,416	$ 420,000	5%
Agency Generated Revenue (fees)	$ -	$ -	$ -	0
Local Government Grants:				
Orange County	$ 2,000	$ 2,000	$ 6,000	200%
Town of Chapel Hill	$ 2,000	$ 2,000	$ 6,000	200%
Town of Carrboro	$ 500	$ 1,350	$ 3,000	122%
Other Local: Durham County	$ 15,005	$ 15,005	$ 25,000	67%
Other Local: Various Sources	$ 369,000	$ 144,150	$ 150,000	4%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 40,000	$ 54,332	$ 55,000	1%
State Government				0
Federal Government				0
Other Grants: Various Sources	$ 235,257	$ 169,106	$ 187,000	11%
Other Grants:				0
Miscellaneous/Other Revenue	$ 104,000	$ 211,191	$ 182,000	-14%
Please list 3 largest Miscellanous sources:				
Annonymous funders				
$ -				
$ -				
Total Agency Revenue	**$ 1,107,762**	**$ 999,550**	**$ 1,034,000**	**3%**
AGENCY EXPENSES				
Compensation	$ 961,000	$ 768,000	$ 768,738	0%
Rent & Utilities	$ 125,000	$ 90,262	$ 90,262	0%
Supplies & Equipment	$ 45,000	$ 40,000	$ 45,000	13%
Travel & Training	$ 10,000	$ 8,000	$ 15,000	88%
Other Expenses:	$ 110,000	$ 110,000	$ 115,000	5%
Please list 3 largest "Other Expenses":				
Professional services $ 20,000.00				
Ins, Printing, postage, IT $ 90,000.00				
$ -				
Total Agency Expenses	**$ 1,251,000**	**$ 1,016,262**	**$ 1,034,000**	**2%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (143,238)**	**$ (16,712)**	**$ -**	**100%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
CEO	1.00	45%	$81,114	$75,429	$75,429	7%	H
Chief Development Officer	1.00	15%	$75,729	$72,000	$72,000	6.5%	H
VP of Programs	1.00	100%	$55,393	$52,800	$53,800	5%	H
VP of Partnerships	1.00	85%	$50,841	$49,315	$49,315	4.7%	H
Finance and HR Manager	.50	25%	$38,000	$36,100	$36,100	3%	H
Director of Special Initiatives	1.00	100%	$42,774	$41,490	$41,900	4%	H
Director of Site-Based Programs	1.00	100%	$42,960	$41,671	$41,671	4%	H
Director of Quality Control	1.0	100%	$33,756	0	0	0%	-
Grants Coordinator	1.0	25%	$40,000	$25,000	$25,000	2%	-
Marketing/Special Events Coordinator	1.0	50%	$35,875	$15,000	$15,000	1%	-
Enrollment & Match Specialists	2.5	100%	$94,863	$85,000	$85,000	8%	H
Customer Relations Specialist	1.0	100%	$30,000	30,000	$30,000	2%	H
Match Support Specialists	4.0	100%	$158,692	$`152,000	$152,000	14%	H

VOLUNTEER HOURS	22	95%	$48,720	$48,720	$50,280	4.8%	-

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Bridge II Sports

Street Address: 4122 Bennett Memorial Rd, Suite 105 Durham, NC 27705

Mailing Address: 4122 Bennett Memorial Rd, Suite 105 Durham, NC 27705

Website Address: Bridge2Sports.org

Executive Director: Ashley Thomas

Telephone: (866) 880-2740 E-Mail: Ashley@bridge2sports.org

Contact Person: Cathy Wickward

Telephone: (919) 699-3031 E-Mail: CathyW@bridge2sports.org

Fax: _____ Federal ID Number: 20-8577055

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$3,000	$8,000
Summary of intended use of funds: We are asking for funding for two programs: 1. Continued support for the wheelchair basketball and adaptive cycling programs ($3000) 2. Funding to conduct an adaptive sports day in five Orange County Public Schools to promote awareness, inclusion and tolerance within the faculty, staff and students. This program also serves as an outreach to people with disabilities to raise awareness of current programs within Bridge II Sports that have outcomes resulting in healthier lifestyles, increased community collaboration and academic success. ($5000)		
Town of Chapel Hill	$3,000	$8,000
Summary of intended use of funds: We are asking for funding for two programs: 1. Continued support for the wheelchair basketball and adaptive cycling programs ($3000) 2. Funding to conduct an adaptive sports day in five Chapel Hill-Carrboro City Schools to promote awareness, inclusion and tolerance within the faculty, staff and students. This program also serves as an outreach to people with disabilities to raise awareness of current programs within Bridge II Sports that have outcomes resulting in healthier lifestyles, increased community collaboration and academic success. ($5000)		

Town of Carrboro	$3,000	$8,000

Summary of intended use of funds: We are asking for funding for two programs:

1. Continued support for the wheelchair basketball and adaptive cycling programs ($3000)
2. Funding to conduct an adaptive sports day in five Chapel Hill-Carrboro City Schools to promote awareness, inclusion and tolerance within the faculty, staff and students. This program also serves as an outreach to people with disabilities to raise awareness of current programs within Bridge II Sports that have outcomes resulting in healthier lifestyles, increased community collaboration and academic success. ($5000)

Stacey Thomas

Executive Director

1/22/2015

Date

Shannon Cullinane

Board Chair

1/23/2015

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: Bridge II Sports began on February 23, 2007

   b. Years in Operation: In February 2015, Bridge II Sports will have been in operation for eight years.

   c. Mission or Vision Statement (if applicable): At Bridge II Sports, our mission is to help children and adults with physical disabilities and challenges discover and build their confidence, self-esteem and tenacity through sports.

      We are a nonprofit organization and collaborate with community partners throughout the region and state to provide equipment, coaching, team coordination and play space so people of all ages and abilities can participate in team and individual sports.

   d. Brief History of Agency: We are a nonprofit organization and collaborate with community partners throughout the region and state to provide equipment, coaching, team coordination and play space so people of all ages and abilities can participate in team and individual sports. In 2007, we began with one event/program and 12 participants. In 2014, we hosted 73 events, ran 14 programs and held archery and air rifle practices.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). IF MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

   Program 1:
   Wheelchair basketball provides individuals with spinal cord injuries, amputees or able bodied individuals who want to play wheelchair basketball on a team to play weekly. The program provides a healthy and safe environment for athletes to socialize and collaborate together as they work toward healthier lifestyles. Bridge II Sports maintains and provides specialized wheelchairs for anyone interested in participating free of charge to participants. Bridge II Sports currently has a wheelchair basketball team for youth until they graduate from high school. The team practices once a week and travels to tournaments throughout the season.

Bridge II Sports organizes a monthly adaptive cycling program, during the Spring and Fall, for people to participate in. This program is open to all people with disabilities. Bridge II Sports maintains and provides all the equipment needed to participate free of charge for everyone. This program includes hand cycles, recumbent bikes, and tandem bikes for blind or low vision people, with a sighted rider in the front.

Program 2:
This program will provide education and support to encourage and equip schools to include kids with physical disabilities into PE classes, extracurricular activities and sports teams within the schools.

These presentations will provide education about adaptive sports and people with disabilities, promote tolerance and promote inclusion within our schools and communities.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.
Program 1:
In 2014-2015, the funding we received from Orange County, Chapel Hill and the City of Carrboro ($3,000 each) was to support the basketball and cycling programs that serve adults and youth with disabilities.

In 2015-16, we are requesting that this funding continue.

Program 2:
We are asking for additional funding to pay expenses that are incurred in conducting educational programs at schools within Orange County Public Schools and CH/CCS. These presentations will provide education about adaptive sports and people with disabilities, promote tolerance and promote inclusion within our schools and communities.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

Programs 1 and 2:
We have requested funding from the BlueCross BlueShield of North Carolina Foundation to purchase additional sports chairs that will support both programs that we are requesting funding for.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)
Program 1
- BlueCross BlueShield of North Carolina Foundation: Funding to purchase and maintain additional equipment
- Duke and UNC Students: Serve as volunteers to assist with wheelchair basketball and adaptive cycling programs
- Braggtown Baptist Church: Donates the space that is used for practices for wheelchair basketball

- City of Durham: Funding to help support wheelchair basketball, adaptive cycling, adaptive archery and adaptive air rifle programs and events.
- Disabled Sports USA – As a member, the cost of insurance is affordable for the level that we are required to carry due to our venues, athletes and funders.

Program 2:

- Disabled Sports USA – As a member, the cost of insurance is affordable for the level that we are required to carry due to our venues, athletes and funders.
- BlueCross BlueShield of North Carolina Foundation: Funding to purchase and maintain additional equipment

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Program 1 and 2:
Our mission statement identifies us as an organization that helps children and adults with physical disabilities. All of the services and programs focus on inclusion of these athletes or education to people about disabilities.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	x	x		x
Health and Nutrition	x			x
Job Training				
Sports and Arts Activities	x			x
Pre-School Activities				
After-School Activities	x			x
Mentoring	x			x
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
100% of athletes enrolled in our programs will remain in school and graduate High School, when eligible	Coaches build relationships with athletes and their families to provide resources and mentoring to students who are at risk as part of the regular practices and regular contact they have with athletes	100% of students enrolled in our programs who were eligible to graduate did so.	Graduation statistics gathered through information from coaches and participants.
Organize and conduct regular practices for Jr. Dragons (youth) and Carolina Dragons (adults).	Practices will be organized and conducted by trained coaches. Equipment will be safe, clean, well maintained and provided free for all participants.	Practices for Jr. Dragons – 35 practices were conducted (53 program hours with athletes) Practices for Dragons – 35 practices were conducted (70 program hours with athletes)	Metrics were gathered during the year to track practices and number of athletes attending.
Organize and conduct monthly practices for adaptive cycling athletes	Practices will be organized and conducted by trained coaches. Equipment will be safe, clean, well maintained and provided free for all participants.	Practices for cycling – 14 practices were conducted (42 program hours with athletes)	Metrics were gathered during the year to track practices and number of athletes attending.
Raise awareness in the community of adaptive sports and the importance of inclusion and acceptance of people with disabilities.	Conduct practices in places where able bodied athletes compete and be deliberate about integrating able bodied athletes, their supporters and our athletes with disabilities to promote inclusion and acceptance	Over 457 people were exposed to adaptive sports from these programs.	Metrics were gathered during the year to track attendance and number of athletes attending.

If program(s) did not meet its stated goal(s), please explain:

N/A

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

PROGRAM 1:

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
100% of athletes enrolled in our programs will remain in school and graduate High School, when eligible	Coaches build relationships with athletes and their families to provide resources and mentoring to students who are at risk as part of the regular practices and regular contact they have with athletes	100% of students enrolled in our programs who are eligible to graduate will do so.	Graduation statistics gathered through information from coaches and participants.
Organize and conduct regular practices for Jr. Dragons (youth) and Carolina Dragons (adults).	Practices will be organized and conducted by trained coaches. Equipment will be safe, clean, well maintained and provided free for all participants.	Practices for Jr. Dragons – 35 practices Practices for Dragons – 35 practices	Metrics will be gathered during the year to track practices and number of athletes attending.
Organize and conduct monthly practices for adaptive cycling athletes	Practices will be organized and conducted by trained coaches. Equipment will be safe, clean, well maintained and provided free for all participants.	Practices for cycling – 14 practices	Metrics will be gathered during the year to track practices and number of athletes attending.
Raise awareness in the community of adaptive sports and the importance of inclusion and acceptance of people with disabilities.	Conduct practices in places where able bodied athletes compete and be deliberate about integrating able bodied athletes, their supporters and our athletes with disabilities to promote inclusion and acceptance	Over 1300 people will be exposed to adaptive sports from these programs.	Metrics will be gathered during the year to track practices and number of athletes attending.
Increase number of athletes participation in adaptive basketball and cycling by 10% in 2015-2016	Conduct adaptive sports awareness programs within 20 schools in Durham (5 schools) and Orange County (15 schools). Program 2 of this proposal is funding for the 15 schools in Orange County, CH/CCS.	Participation in adaptive basketball and cycling will increase by 10%.	Metrics will be gathered during the year to track practices and number of athletes attending.

PROGRAM 2:

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Conduct five adaptive sports days in identified Orange County Public Schools	Visit the identified school and present adaptive sports to students/faculty and staff within the school to promote awareness, inclusion and tolerance. We will also encourage any students with disabilities to join our adaptive sports teams to promote health and increase positive outcomes.	Five schools in Orange County Public Schools will be visited producing increased awareness, inclusion and tolerance toward people with disabilities.	Metrics will be gathered for each visit to calculate number of schools visited as well as number of attendees to Bridge II Sports' presentations
Conduct 10 adaptive sports days in identified Chapel Hill/City of Carrboro Schools	Visit the identified school and present adaptive sports to students/faculty and staff within the school to promote awareness, inclusion and tolerance. We will also encourage any students with disabilities to join our adaptive sports teams to promote health and increase positive outcomes.	Five schools in Chapel Hill/City of Carrboro Schools will be visited producing increased awareness, inclusion and tolerance toward people with disabilities.	Metrics will be gathered for each visit to calculate number of schools visited as well as number of attendees to Bridge II Sports' presentations

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Bridge II Sports - Program 1

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ -	$ 600	$ 600	0%
Program Generated Revenue (fees)		$ -	$ -	0
Local Government Grants:				
Orange County	$ 3,000	$ 3,000	$ 3,000	0%
Town of Chapel Hill	$ 3,000	$ 3,000	$ 3,000	0%
Town of Carrboro	$ 3,000	$ 3,000	$ 3,000	0%
Other Local: Durham County	$ 1,000	$ 6,000	$ 6,000	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: BCBS of NC Foundation	$ -	$ -	$ 10,000	0
Other Grants:				0
Miscellaneous/Other Revenue	$ 544	$ 1,300	$ 1,300	0%
Please list 3 largest Miscellanous sources:				
Team Fundraising				
$ -				
$ -				
Total Program Revenue	$ 10,544	$ 16,900	$ 26,900	59%
PROGRAM EXPENSES				
Compensation	$ 5,150	$ 5,500	$ 6,100	11%
Rent & Utilities	$ 3,342	$ 3,800	$ 4,600	21%
Supplies & Equipment		$ 4,825	$ 12,500	159%
Travel & Training	$ 1,302	$ 1,425	$ 1,850	30%
Other Expenses:	$ 750	$ 1,350	$ 1,850	37%
Please list 3 largest "Other Expenses":				
Insurance $ 750.00				
Uniforms $ 300.00				
Advertising $ 700.00				
Total Program Expenses	$ 10,544	$ 16,900	$ 26,900	59%
SURPLUS/(DEFICIT) FOR PERIOD:	$ -	$ -	$ -	0

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Bridge II Sports - Program 2

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations			$ -	0
Program Generated Revenue (fees)			$ -	0
Local Government Grants:				
Orange County			$ 5,000	0
Town of Chapel Hill			$ 5,000	0
Town of Carrboro			$ 5,000	0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	$ -	$ -	$ 15,000	0
PROGRAM EXPENSES				
Compensation			$ 9,450	0
Rent & Utilities				0
Supplies & Equipment			$ 3,450	0
Travel & Training			$ 2,100	0
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Program Expenses	$ -	$ -	$ 15,000	0
SURPLUS/(DEFICIT) FOR PERIOD:	$ -	$ -	$ -	0

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

PROGRAM 1

1) **Define one unit of service**[+]: Hours of time interacting and mentoring athletes and/or their families during practices and events related to adaptive cycling and basketball.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	686	686	$10,544	$15.37
Estimated FY14-15	1200	1200	$16,900	$14.08
Projected FY15-16	1400	1400	26,900	$19.21*

*Increased cost per unit due to purchase of 4 additional chairs which is being funded by an additional grant to BCBSNC Foundation.

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

PROGRAM 2:

2) **Define one unit of service**[+]: A five-hour presentation at a public school to increase awareness, inclusion and tolerance of people with disabilities and adaptive sports.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	0	0	0	0
Estimated FY14-15	2	2	$2000	$1000
Projected FY15-16	15	15	$15000	$1000

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: PROGRAM 1: **Actual Athletes (not families and spectators)

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	4**	6**	10**	Durham City	150	230	380
Female	5**	7**	12**	Durham County	16	50	95
2. **Ethnicity**				Raleigh City	158	200	225
African-American	5**	6**	8**	Wake County	60	150	200
Caucasian	3**	5**	7**	Town of Chapel Hill	152	250	300
Hispanic				Town of Carrboro	40	80	100
Other	1**	2**	3**	Orange County	110	240	250
3. **Age**				Other (specify)			
0-5 Years				Per cent of clients at, or below, federal poverty level	Unknown, however all are disabled	Unknown, however all are disabled	Unknown, however all are disabled
6-18 Years	7**	9**					
19-50 Years	2**	4**		***TOTAL # OF CLIENTS SERVED*** *These figures are only collected on actual athletes and the spectators and families are estimates	686*	1200*	1400*
51+ Years							
Unknown							

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: PROGRAM 2: **This is for schools, and the information would reflect the schools demographic

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male				Durham City			
Female				Durham County			
2. **Ethnicity**				Raleigh City			
African-American				Wake County			
Caucasian				Town of Chapel Hill		1000	5000
Hispanic				Town of Carrboro			5000
Other				Orange County		1000	5000
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years				Per cent of clients at, or below, federal poverty level			
19-50 Years							
51+ Years						2000	15000
Unknown				***TOTAL # OF CLIENTS SERVED*** ****Estimating 1000 students per school***			

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Bridge II Sports (2015 Budget Pending BOD Approval)

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 214,470	$ 133,100		-100%
Agency Generated Revenue (fees)	$ 48,311	$ 23,400		-100%
Local Government Grants:				
Orange County	$ 3,000	$ 3,000	$ 8,000	167%
Town of Chapel Hill	$ 3,000	$ 3,000	$ 8,000	167%
Town of Carrboro	$ 3,000	$ 3,000	$ 8,000	167%
Other Local: Durham County	$ 3,000	$ 6,000	$ 15,000	150%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government	$ 117,381	$ 28,800		-100%
Other Grants: Foundation Grants	$ 28,495	$ 201,500		-100%
Other Grants: Business Grants	$ 16,880	$ 16,880		-100%
Miscellaneous/Other Revenue	$ 54,387	$ 10,120		-100%
Please list 3 largest Miscellanous sources:				
evenue released from Restrictio $ 50,000.00				
Event Registration $ 1,278.00				
Contract Services $ 500.00				
Total Agency Revenue	$ 491,924	$ 428,800	$ 39,000	-91%
AGENCY EXPENSES				
Compensation	$ 95,456	$ 142,500		-100%
Rent & Utilities	$ 15,993	$ 58,915		-100%
Supplies & Equipment	$ 13,778	$ 22,100		-100%
Travel & Training	$ 45,140	$ 80,600		-100%
Other Expenses:	$ 297,265	$ 124,685		-100%
Please list 3 largest "Other Expenses":				
Program Expenses in 2013-201 $ 224,491.00				
Payroll Taxes and Insurance $ 9,320.00				
Consultants/Professional Fees $ 51,946.00				
Total Agency Expenses	$ 467,632	$ 428,800	$ -	-100%
SURPLUS/(DEFICIT) FOR PERIOD:	$ 24,292	$ -	$ 39,000	0

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Bridge II Sports

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director		1					
Program Coordinator (2)		2					
Events Coordinator		1					
Administrative Assistant		1					
Accountant		.2					
Grant Writer		.3					
Fiona		1					
Volunteers	4.1						

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Centre for Homeownership & Economic Development Corporation, Inc.**

Street Address: 960 Corporate Drive, Suite 409 Hillsborough, NC 27278

Mailing Address: (same as above)

Website Address: www.homeownershipcentre-ed.org

Executive Director: James Stroud

Telephone: (919)241-4718 E-Mail: jstroud@choedc.org

Contact Person: James Stroud

Telephone: (919)971-7063 E-Mail: jstroud@choedc.org

Fax: (919)241-4720 Federal ID Number: 27-2691355

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$0	$45,000
Summary of intended use of funds: *Agency will provide comprehensive HUD Case Management to Low-to-Moderate Income Applicants who reside in the County that need Rental and Affordable Housing Counseling Services. Funds will also provide a Clearinghouse Referral Data Base to Support Veteran Housing, Section 8 Voucher Rental Housing and Affordable Housing for First Time Home Buyers.*		
Town of Chapel Hill	$0	$35,000
Summary of intended use of funds: *Agency will provide comprehensive HUD Case Management to Low-to-Moderate Income Applicants who reside in Chapel Hill that need Rental and Affordable Housing Counseling Services. Funds will also provide a Clearinghouse Referral Data Base to Support Veteran Housing, Section 8 Voucher Rental Housing and Affordable Housing for First Time Home Buyers.*		
Town of Carrboro	$0	$35,000
Summary of intended use of funds: *Agency will provide comprehensive HUD Case Management to Low-to-Moderate Income Applicants who reside in Carrboro that need Rental and Affordable Housing Counseling Services. Funds will also provide a Clearinghouse Referral Data Base to Support Veteran Housing, Section 8 Voucher Rental Housing and Affordable Housing for First Time Home Buyers.*		

James R. Streeul

Executive Director

Jan. 23, 2015

Date

Howard Manning

Board Chair

1/23/15

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: *Organization was incorporated May 2010*

   b. Years in Operation: *Organization has been in operation since 2004*

   c. Mission or Vision Statement (if applicable): *The Centre for Homeownership & Economic Development Corporation is a HUD Approved Housing Counseling Agency with the purpose of providing housing opportunities and aggressively addressing community development.*

   d. Brief History of Agency: *The Centre was organized and created in 2004 to assist individuals with homebuyer education and financial literacy. The purpose included empowering thousands of individuals to strive for inclusive prosperity and committed sustainability strategies.*

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

   The proposed program will provide HUD Case Management to Veterans, Section 8 Voucher Holders and Renters seeking housing. In addition, the Clearinghouse Resource Data Base will act as a centralized HUB of Resources that will include all housing and financial services for low-to-moderate income individuals. The services would involve providing each township or county with comprehensive quantitative data regarding affordable housing in the community as a whole. This report would contain vital statistics that could further assist government in determining strategies for providing long range goals and affordable housing opportunities for years to come.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

   The only change would involve seeking more housing counseling dollars externally to private institutions and foundations.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

a. New Sources of Revenue will be submitted through HUD

b. External funding from Wells Fargo, Bank of America, Home Depot and

c. Internal funding provided through an existing HUD Grant for 2015-2016

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

Orange County Affordable Housing Board, Orange County Social Services, Inter-Faith Council, Town of Chapel Hill, Town of Carrboro, Orange County Local Government, CEF, Empowerment, Inc., Habitat for Humanity, Chapel Hill Community Land Trust, Chapel Hill Public Housing, Orange County Department of Housing, Human Rights and Community Development, Orange County Affordable Housing Coalition, Town of Hillsborough, Partnership to End Homelessness.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

- *Justice United*
- *Jackson Center*
- *Rogers Road Community*
- *Other Civic, Church and Social groups*

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education		X	X	X
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				

Transportation				
Housing		X	X	X
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	*Counselor meets with students, as the first contact, for students referred for minor infractions.*	*Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)*	*School records were checked to verify that students had not been suspended.*
N/A	N/A	N/A	N/A

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	*Counselor meets with students, as the first contact, for students referred for minor infractions.*	*Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)*	*School records were checked to verify that students had not been suspended.*
N/A	N/A	N/A	N/A

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Centre for Homeownership & Economic Development Corporation, Inc.

	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
PROGRAM REVENUE				
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County			$ 45,000	0
Town of Chapel Hill			$ 35,000	0
Town of Carrboro			$ 35,000	0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: HUD			$ 21,500	0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	$ -	$ -	$ 136,500	0
PROGRAM EXPENSES				
Compensation			$ 107,500	0
Rent & Utilities			$ 3,600	0
Supplies & Equipment			$ 1,500	0
Travel & Training			$ 2,400	0
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Program Expenses	$ -	$ -	$ 115,000	0
SURPLUS/(DEFICIT) FOR PERIOD:	$ -	$ -	$ 21,500	0

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]:

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14			N/A	
Estimated FY14-15			N/A	
Projected FY15-16			115,000	611.70

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male			75	Durham City			
Female			113	Durham County			
2. **Ethnicity**				Raleigh City			
African-American			73	Wake County			
Caucasian			87	Town of Chapel Hill			89
Hispanic			28	Town of Carrboro			58
Other				Orange County			41
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years			17	Per cent of clients at, or below, federal poverty level			65
19-50 Years			148				
51+ Years			23				
Unknown				***TOTAL # OF CLIENTS SERVED***			188

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Centre for Homeownership & EDC, Inc.

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Agency Generated Revenue (fees)		$ 21,500	$ 21,500	0%
Local Government Grants:				
Orange County			$ 45,000	0
Town of Chapel Hill			$ 35,000	0
Town of Carrboro			$ 35,000	0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	$ -	$ 21,500	$ 136,500	535%
AGENCY EXPENSES				
Compensation			$ 107,500	0
Rent & Utilities			$ 3,600	0
Supplies & Equipment			$ 1,500	0
Travel & Training			$ 2,400	0
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Agency Expenses	$ -	$ -	$ 115,000	0
SURPLUS/(DEFICIT) FOR PERIOD:	$ -	$ 21,500	$ 21,500	0%

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Centre for Homeownership & EDC, Inc.

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Housing Case Management Counselor	1.0		N/A	N/A	54000	50	
Housing Intake Specialist	1.0		N/A	N/A	48,600	45	
Outreach Specialist	1.0		N/A	N/A	10,800	10	
					113,400		

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.

- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: Chapel Hill-Carrboro Meals on Wheels

Street Address: 1712 Willow Road Chapel Hill NC 27514

Mailing Address: PO Box 2102 Chapel Hill NC 27514

Website Address: www.chcmow.org

Executive Director: Stacey Yusko

Telephone: 919-942-2948 E-Mail: stacey@chcmow.org

Contact Person: Stacey Yusko

Telephone: 919-942-2948 E-Mail: stacey@chcmow.org

Fax: na Federal ID Number: 59-1721954

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$10,000	$15,000
Summary of intended use of funds: We seek funding to support our home delivered meal program for senior adults and people with disabilities. Funds are needed to offset program costs for clients who receive a subsidy and reside in Orange County. **In 2014, we provided 2,858 meals at no cost to residents of Orange County but valued at $14,290. 78% of our Orange County clients pay less than half the actual cost of the meal.**		
Town of Chapel Hill	$9,000	$15,000
Summary of intended use of funds: We seek funding to support our home delivered meal program for senior adults and people with disabilities. Funds are needed to offset program costs for clients who receive a subsidy and reside in Chapel Hill**. In 2014, we provided 3,578 meals at no cost to Chapel Hill residents but valued at $17,890. 75% of our Chapel Hill clients pay less than half the actual cost of the meal.**		
Town of Carrboro	$10,000	$15,000
Summary of intended use of funds: We seek funding to support our home delivered meal program for senior adults and people with disabilities. Funds are needed to offset program costs for clients who receive a subsidy and reside in Carrboro**. In 2014, we provided 2,805 meals at no cost to Carrboro residents but valued at $14,025. 81% of our Carrboro clients pay less than half the actual cost of the meal.**		

Executive Director Board Chair

Date Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 1976

   b. Years in Operation: 38

   c. Mission or Vision Statement (if applicable):

      We nourish the bodies and spirits of the homebound with a balanced meal and the human connection they need to help them live independently

   d. Brief History of Agency: The CHCMOW program was started in 1976 by a group of concerned citizens, led by the congregation at Chapel of the Cross. They saw people who needed support services, but who could not get to the source of help. The CHCMOW program was designed to bring food, visits, information and access to those who were homebound. CHCMOW started with a dozen volunteers and now have over 175 people who help us address hunger, isolation and disenfranchisement.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

We directly impact the lives of those who are ***frail and disabled*** by providing ***food assistance*** to those who are in ***economic distress***. This directly mirrors the community needs identified in the 2011 Human Services Needs Report.

We provide a hot nutritious meal and personal visit Monday through Friday to those individuals living in Chapel Hill, Carrboro and the surrounding area who are unable to prepare meals for themselves due to illness, disability, or convalescence in order to improve their health, reduce isolation and help them maintain independent living.

Thanks to the hard work of our more than 175 volunteer drivers and bakers, CHCMOW provided 38,000 meals to over 250 individuals in need during 2014. We serve a diverse client base that is 44% minority, 64% female, and increasingly more elderly—31% of our clients last year were 85 years of age or older.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

The demand for the services provided by CHCMOW has increased and is projected to continue to increase. ***Keeping up with this overwhelming demand*** *for* services is the first operational and financial issue that we face. The demand for CHCMOW's services is projected to rise to such a level that continued operations at the current location of Binkley Baptist Church are impracticable and unsustainable over the long term. In fact, CHCMOW already has outgrown its capacity at Binkley. CHCMOW struggles each day to come up with new ways to capitalize on the little space that we do have at this time.

This first issue thus leads to a second issue: ***a need to identify a new home and to prepare for the move***. The focus of our Board this year is on exactly that - the search for a new space and preparing for a move. We have earmarked funds from our first Dining for Dollars event for that purpose. We currently operate rent-free at Binkley (they pay for internet and utilities as well) and know that we won't be able to find that level of outreach and financial support in our next home.

The third operational and financial issue that we face is the expectation that our ***financial support from the United Way will be decreasing every year*** as they change their focus to children and families from what it once was. We already have seen significant declines in these critical funds. We will have to find a way to offset that drop in revenues. We hosted two new events in 2014 that were successful and give us hope that if we develop our individual donors well enough, we should be able to maintain our level of services.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

We expect our revenue streams to be the same as in years past but we are focusing our efforts in certain areas and hope to gain more support in those specific areas (**bolded**) in the next twelve months Percentages refer to what was collected in the past twelve months

Internal: Program fees (18%)

External: **Grants** (20%) (Includes a grant from Walmart of $25,000)
Congregations (4%)
Corporate Support (8%)
Events/Fundraisers (10%)
In-Kind donations (5%)
Private donors (24%)
United Way (9%)
Other income (2%)

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- **Arc of Orange County, RSI, CHCCS** special needs programs – we provide volunteer placements for those with challenges. They help set up, count out meals, and deliver.
- **Porch** – we partner to deliver monthly senior snack bags that are shelf stable and augment the clients' pantries
- **IFC** – we refer clients who may be eligible for the Duke energy grant. We also talk to them about specific clients for additional services (vision care, Sec 8 housing challenges)
- **Farmer Foodshare –** we purchase fruit every Tuesday
- **Book Harvest NC – we** deliver books that are like new to our clients (they serve children, so we take donations that are suitable for adults)
- **HomeStart, Ronald McDonald House, SECU** – we donate extra food that we can't distribute ourselves in a timely fashion.
- **Department on Aging** – we distribute the Senior Times quarterly and refer clients who need more services to the Department
- **CHCCS** – we provide service hour opportunities for high school students. In 20104 we started a new partnership with the Carrboro High School Exceptional Students program to have them come in every month and help us pack our snack bags.
- **Harris Teeter and Starbucks at University Mall, Trader Joe's, Panera** – we "glean" food that is pulled from the shelves because of sell by date restrictions and deliver it the same day for our clients benefit
- **Orange County Executive Directors Board of the United Way and Food Security Work group –** our Director served for three years as the representative to the UW Board and works on a subcommittee currently that addresses how to collaborate and make an impact on the problem of food security in our area.
- **The American Red Cross –** we are the designated source for their meals in emergency situations
- **UNC School of Government, UNC School of Public Health, Kenan-Flagler MBA program UNC Journalism students**–we have hosted and advised several volunteers and interns from these organizations. These opportunities for those volunteers and interns have supplemented their classroom work while giving us the benefit of wisdom gained in their academic endeavors.
- **Orange County Animal Shelter** – we deliver donations of pet food on an annual basis from the shelter to those clients who have pets.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

CHCMOW has client representation from diverse groups in terms of gender, ethnicity, age, sexuality, geography, and income level. This is not an all-inclusive list. We have CHCMOW brochures and resource information available in Spanish and English. We have a robust committee that restocks informational handouts at churches, the

Department on Aging, UNC Hospitals, rehab centers, and other facilities. We try to blanket everywhere we identify as a possible referral source with outreach information. We have a strong relationship with UNC Home Heath and they refer many minority clients. Our Board members and Board committee members represent a spectrum of income levels, race, sexuality, age, and religion.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition		X	X	X
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
To provide a nutritious meal to each client every weekday.	Package, assemble and deliver meals prepared by K&W and Nantucket Café as well as donated goods from Panera, Trader Joes, Starbucks and Harris Teeter	We delivered 36,121 hot meals and 1,944bagged lunches to 250 different people over the course of the year. On Mondays, Wednesdays and Fridays extra bread and baked goods were delivered to clients.	Volunteer log and client delivery records were kept. Menu is developed by K&W and changed and approved by CHCMOW.
To provide a personal visit every weekday to clients who are at a high risk for isolation and depression.	Approximately 104 volunteers deliver each week so every weekday someone is making contact with our clients. Each volunteer checks on the wellbeing of each client, provides a physical source of contact, support, and connection for each client, and notes any concerns for volunteer and staff follow-up.	In 2013-14 we referred clients to Adult Protective Services, made calls to family when there were concerns about state of mind or health, spoke to Veterans Affairs, and suggested resources to clients and their families that might alleviate or mitigate difficult circumstances in a client's life.	Notes in Client files and incident reports submitted by volunteers
To serve as the gateway for clients to access information about other critical support services	Delivered Senior times quarterly, delivered information from NCSHIIP, information about the IFC Duke Energy grant, Porch snack bags on a monthly basis, a summary of the Community Resource Guide pertinent to our clients and much more	Clients received information as well as tangible goods – snacks, papers, books, magazines and brochures that help them stay independent and informed.	Director keeps a record of extra services provided and all collaborations with partner agencies

If program(s) did not meet its stated goal(s), please explain_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
To provide 41,800 nutritious meal	Package, assemble and deliver meals as well as donated goods	Clients will receive nutritious meals each weekday – anticipate 41,800 meals for 2015-16	Volunteer log and client delivery records will be kept.
To provide 41,800 personal visit to those who are at the highest of risk levels for isolation and depression.	Volunteers will make contact and converse with clients each delivery	Volunteers will make positive contact at each of their delivery stops. Clients will have an increased perception of the level of support in their lives.	Notes in Client files and incident reports submitted by volunteers .Use of the Life and Mental Health Evaluation tool designed by UNC School of Public Health graduate student specifically for CHCMOW.
To serve as the gateway for clients to access information about other critical support services.	Will deliver information and materials provided to us by collaborating agencies, volunteers will be informed of any extra services available	Information will be distributed to the clients benefit	Director will keep a record of extra services provided and all collaborations with partner agencies

Section III. Program Information
Agency Budget Worksheet

AGENCY NAME: Chapel Hill-Carrboro Meals on Wheels

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 74,260	$ 71,350	$ 70,200	-2%
Program Generated Revenue (fees)	$ 56,000	$ 54,000	$ 48,000	-11%
Local Government Grants:				
Orange County	$ 2,000	$ 10,000	$ 10,000	0%
Town of Chapel Hill	$ 7,500	$ 9,000	$ 10,000	11%
Town of Carrboro	$ 5,000	$ 10,000	$ 10,000	0%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 25,440	$ 28,280	$ 28,000	-1%
State Government	$ -	$ -	$ -	0%
Federal Government	$ -	$ -	$ -	0%
Other Grants: Walmart	$ -	$ 25,000	$ 10,000	-60%
Other Grants: Strowd Roses, Food Lion, Bank	$ 24,750	$ 10,100	$ 17,000	68%
Miscellaneous/Other Revenue	$ 61,050	$ 92,207	$ 64,700	-30%
Please list 3 largest Miscellanous sources:				
events/fundraisers $	$ 11,350	$ 30,500	$ 32,500	
Corporations/Congregations $ -	$ 21,300	$ 36,190	$ 25,000	
In Kind $ -	$ 28,400	$ 15,580	$ 7,200	
Total Program Revenue	**$ 256,000**	**$ 309,937**	**$ 267,900**	**-14%**
PROGRAM EXPENSES				
Compensation	$ 25,418	$ 29,624	$ 31,380	6%
Rent & Utilities	$ 1,782	$ 1,960	$ 2,080	6%
Supplies & Equipment	$ 4,781	$ 4,911	$ 5,250	7%
Travel & Training	$ 1,580	$ 493	$ 200	-59%
Other Expenses:	$ 201,454	$ 220,080	$ 228,990	4%
Please list 3 largest "Other Expenses":				
Food Cost $ -	$ 180,194	$ 197,766	$ 204,440	
ıntant/We/database Consulting $ -	$ 8,640	$ 13,211	$ 8,500	
Insurance $ -	$ 2,700	$ 2,036	$ 3,000	
Total Program Expenses	**$ 235,015**	**$ 257,068**	**$ 267,900**	**4%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 20,985**	**$ 52,869**	**$ -**	**-100%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: a meal delivered to a recipient in one's own home

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	33,816	33,816	235,000	6.95
Estimated FY14-15	38,065	38,065	242,000	6.36
Projected FY15-16	41,800	41,800	267,900	6.40

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Chapel Hill-Carrboro Meals on Wheels

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16
1. **Gender**			
Male	79	91	100
Female	132	159	175
2. **Ethnicity**			
African-American	80	101	111
Caucasian	122	139	153
Hispanic	4	3	4
Other	4	7	7
3. **Age**			
0-5 Years			
6-18 Years			
19-50 Years	9	8	9
51+ Years	202	242	266
Unknown			

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16
4. **Geographic Location(s)**			
Durham City			
Durham County			
Raleigh City			
Wake County			
Town of Chapel Hill	110	117	128
Town of Carrboro	67	78	86
Orange County	34	55	61
Other (specify)			
Per cent of clients at, or below, federal poverty level	35 estimated	48% confirmed	50% estimated
TOTAL # OF CLIENTS SERVED	211	250	275

Section VI.

Comparative Budget for Entire Agency

(Excel file)

Identical to the Program budget

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Chapel Hill-Carrboro Meals on Wheels

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	.5	1	$23,000	$25,000	$26,800	9%	n/a
Bookkeeper	.25	1	$3,000	$4,000	$4,500	1.5%	n/a
Board of Directors, Chairperson				500 hours	360 hours		
Board of Directors Members				40 hours	40 hours		
Board of Directors, Committee Members				20 hours	20 hours		
Daychairs (schedule drivers)			780 hours	780 hours	780 hours		
Volunteer Drivers			10,400 hours	11,440 hours	12,100 hours		
Volunteer Bakers			1,980 hours	2,160 hours	2,300 hours		
Setup/operations			858 hours	858 hours	858 hours		
Cleanup			234 hours	234 hours	234 hours		
Food runners			832 hours	832 hours	936 hours		
Publicity/Newsletter/Social Media				120 hours	120 hours		
Total Hours volunteered			15,084	16,984	17,748		9.06 FTE in 2015-2016

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: **CHAPEL HILL-CARRBORO YMCA**

Street Address: 980 Martin Luther King Jr. Blvd, Chapel Hill, NC 27514

Mailing Address: as above

Website Address: www.chcymca.org

Executive Director: Kim Grooms, Executive Director

Telephone: 919-442-9622 E-Mail: kim.grooms@YMCAtriangle.org

Contact Person: Tami Pfeifer, Boomerang Director

Telephone: 919-945-0640 E-Mail: tami.pfeifer@YMCAtriangle.org

Fax: 919-942-4047 Federal ID Number: 56-0591307

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$ 5,000.00	$ 7,000.00
Summary of intended use of funds: Funds will support the position of Program Manager (FT). This position coordinates daily program delivery, provides 1:1 counseling to students, organizes after school programming and community service, facilitates back-to-school transitions post-suspension, and manages volunteers, among other duties.		
Town of Chapel Hill	$ 2,000.00	$ 5,000.00
Summary of intended use of funds: Funds will be used to contract with local agencies to provide weekly substance use and healthy relations workshops during Alternative to Suspension (and after school programming as needed); and to procure program supplies.		
Town of Carrboro	$ 1,500.00	$ 3,000.00
Summary of intended use of funds: Funds will be used for conflict resolution training and mediation for court-involved students, and personnel support for a Program Specialist.		

Executive Director

Board Chair

Date

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: The Chapel Hill-Carrboro YMCA was established in 1968. The Boomerang Program was launched in 2006.

   b. Years in Operation: The Boomerang Program has been in operation for 9 years.

   c. Mission or Vision Statement (if applicable): Established in 1968, the Chapel Hill-Carrboro YMCA's programming is guided by three central tenets:

- Youth Development: children and youth deserve the opportunity to cultivate the values, skills and relationships that lead to positive behaviors, better health and educational achievement.
- Healthy Living: children, youth, adults and families deserve the support, guidance and resources needed to achieve greater health and wellbeing for their spirit, mind and body.
- Social Responsibility: responding to the evolving social needs of the communities the Y serves through education and training, welcoming and connecting diverse populations and building healthier communities by collaborating with policymakers, the Y fosters the care and respect all people deserve.

Boomerang is a program of the Chapel Hill-Carrboro YMCA and created under its guiding principles and values, in particular Youth Development and Social Responsibility. Boomerang's mission seeks to engage youth at risk for disconnection and their communities by providing a supportive alternative environment for out of school time, and advocating for community change that has enduring benefits for all adolescents.

   d. Brief History of **Boomerang Program**:

2006: Boomerang is launched as a pilot alternative to suspension program in January, serving one middle and one high school
2006: District Court Judge mandates CHCCS court-involved youth attend Boomerang
2007: Boomerang expands services to all CHCCS middle and high schools
2008: Boomerang expands services to court-involved youth in Orange County
2008: Boomerang becomes an approved adult community service site in 2008
2008: Boomerang and Volunteers for Youth enter an agreement allowing court-involved Orange County youth aged 16 and younger to complete court ordered community service hours at Boomerang
2009: Boomerang offers after school hours on Wednesdays-Fridays for students to drop in to complete service hours and check in with staff
2010: Boomerang offers community service hours during the summer break
2011: Boomerang expands services to Orange County Schools
2011: Boomerang expands to a 5-day program in September 2011, including afterschool programming
2012: Boomerang expands services to select high schools in Chatham County
2014: Boomerang moves to a Y facility in Meadowmont, Chapel Hill

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). IF MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

The population Boomerang serves - low-income students, English language learners, Black and Latino students, and students with special educational needs – is particularly vulnerable as many of them are challenged by academic underperformance and face greater suspension rates than their peers.

Suspension is a strong indicator of disconnection, especially for students with greater risk and fewer protective factors who are unsupervised during their out-of-school time. Suspended students are 3 times more likely to drop out of school, providing the rationale for a constructive alternative to suspension. As the only program offering an alternative to short term suspension for youth in Orange County, Boomerang effectively keeps these students engaged during out-of-school time by keeping them on-task in schoolwork, providing them with life skills-building opportunities and with afterschool programming.

Boomerang is collaborating with school districts on (i) ways to effectively meet the needs of students with learning and behavioral challenges at greater risk for disciplinary action, (ii) addressing school policy and climate to reduce racial disparities in sanctioning students, and (iii) targeting social-emotional skill building for vulnerable students. The program has contributed to declining suspension rates in CHCCS.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

The Chapel Hill-Carrboro YMCA is now a part of the YMCA of the Triangle, and is transitioning to their financial systems (fiscal year October-September).

The Boomerang Program is currently housed at the YMCA facility in Meadowmont, which is not easily accessible to students after school. Boomerang is therefore actively seeking an alternative site that is convenient for both CHCCS and OCS students for the 2015-16 school year.

No other operational or financial changes are being considered in 2015-16 at this time.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

CHCCS	Ongoing
OCS	Ongoing
JCPC	Ongoing
Chapel Hill-Carrboro YMCA	Ongoing
United Way	Ongoing
Oak Foundation	*Anticipated, current 3-year grant ending in Spring 2015*

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

Collective impact

- School districts - Chapel Hill-Carrboro City Schools and Orange County schools – are core partners in coordinating services provided to suspended students and transitioning them back to school.
- Department of Juvenile Justice is a core partner in coordinating services and follow-up with court-involved students.
- Dispute Settlement Center provides weekly skills-building sessions in conflict resolution, an important service as the majority of suspensions we serve are for fighting.
- Sacrificial Poets provides academic support to students in Language Arts, specifically on developing grade-appropriate writing skills with an emphasis on self-expression through personal narratives.
- Boomerang has a formal partnership with Volunteers for Youth and the Adult Community Service office to provide approved community service programming for juvenile and adult court involved youth during after school hours.
- Boomerang has a formal partnership with UNC's School of Social Work to provide our program with a qualified MSW intern each year. The intern functions as staff and provides additional support during alternative to suspension and afterschool programming.
- Boomerang partners with UNC's APPLES Service Learning program; volunteers mainly provide academic support to students, including 1:1 tutoring.
- UNC Outpatient Substance Abuse Clinic provides weekly workshops on substance use.
- Orange County Rape Crisis Center/Compass Center provides weekly workshops on healthy relations and sexual health.
- Boomerang works with partner agencies to refer students and families for follow-up services: Carolina Outreach provides mental health services to students, and Family Advocacy Network provides critical assistance to parents raising school-age children with emotional/behavioral issues, mental illness, learning differences, substance abuse problems and other challenges.

- Boomerang is a participating member in the Orange County Health Department's Family Success Alliance initiative.
- Boomerang is a member of the Third Sector Alliance, a community organization that seeks to address community needs and support collaborations to improve the quality of life of all who live and work in Orange County.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Boomerang's client base is referred by local school districts and the court system. Approximately 70% of youth served in our alternative to suspension are racial and ethnic minorities, indicating the accessibility of the program to various ethic and minority groups. In 2013-14, of the 192 students served, 129 were racial and ethnic minorities.

Boomerang encourages discussions around questions of race and provides youth with a safe, supportive environment to ask questions, articulate thoughts and opinions, and receive additional information.

Students participate in psycho-educational groups related to first impressions, stereotypes, and cliques that occur within their schools as a method of breaking down boundaries and embracing differences in many areas. Boomerang ensures that interpreters are present to engage parents and students for whom language might be a hindrance to participation and has been successful in engaging students with other language barriers. In addition to ensuring that services are accessible, Boomerang provides training to our diverse staff to encourage and build cultural competency and understanding of difference.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth *	Adult	Older Adults	Persons with Disability
Education	X			
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities	X			
Mentoring				
Transportation				
Housing				
Other				

***** Includes youth classified as 'adults' in the court system.

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
80% of all eligible students will attend Boomerang when referred during their suspension.	Daily academic support through 1:1 tutoring and assessment of learning styles, completion of a substance use assessment if relevant, participation in life skills group activities, completion of a strengths assessment, participation in a Wrap Up meeting.	Of the 238 referrals received, 192 or 81% were served. 46 referrals were either not reachable, had no transportation, or parents chose to keep them home during their suspension.	- School referral forms - Daily attendance records - Qualitative Notes on student's participation and behavior - Service Notes
75% of students completing community service hours at Boomerang will complete at least 5 hours of service.	Community Service hours offered Tuesday-Thursday from 4-6pm, as well as 3 designated community service days, providing students the opportunity for civic engagement while completing school-required or court-ordered service hours.	180 instances of community service (19 individual students) completed 263 hours of community service during 2013-14. Of these students, 79% completed at least 5 hours of community service at Boomerang.	- Incoming community service referral forms - Daily timesheets - Reports on participant hours to Volunteers for Youth for students under 16 years - Reports on participant hours to Adult Community Service for students 16 years and older
50% of youth attending Boomerang's "What's Next?" workshops will attend at least 2 group sessions.	Boomerang will provide at least 6 weeks of once weekly "What's Next" workshops on topics related to post secondary education, job exploration, and life skills, in Fall and Spring of the school year.	26 students (65 instances) participated in "What's Next?" workshops, held in Fall 2013 and Spring 2014. Of these, 50% completed at least 2 group sessions.	- Attendance records - Post-session surveys

70% of professionals trained will report an increase in their understanding of resiliency research.	Two training sessions to be provided on resiliency to staff and volunteers, and one training session on motivational interviewing for program staff.	All trainees reported **100%** increase in their understanding and application of resiliency research, and motivational interviewing.	Performance assessments, post-training surveys and exit interviews with MSW intern.
60% of youth identified for intensive follow up services will report/demonstrate an increase in social connectedness – the criteria and timing is dependent on each student's individual plan but in most cases progress will be made by end of the school year.	Providing a cohort of identified youth with additional support extending beyond their suspension period, through sustained contact via social media, reunions and other afterschool programming.	15 students received systematic support and follow-up services during 2013-14: - 80% of this cohort graduated or was promoted to the next grade - 270 social media contacts were exchanged between staff and students - 71 instances of students coming by after school for counseling - 13 students attended monthly Boomerang reunions - 116 hours of community service were completed at Boomerang - Of the 9 students completing a Boomerang survey measuring their sense of connection to their communities, all reported a significant increase in 'connectedness' after attending Boomerang.	- Attendance records in afterschool programming, including reunions - Qualitative Notes from Boomerang staff - Communications with school representatives - Social media logs - "Change readiness" surveys

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2015-16 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
80% of all eligible students will attend Boomerang when referred during their suspension.	Daily academic support through 1:1 tutoring and assessment of learning styles, completion of a substance use assessment if relevant, participation in life skills group activities, completion of a strengths assessment, participation in a Wrap Up meeting.	Out of the anticipated 165 students attending Boomerang's Alternative to Suspension component, at least 132 students will attend and complete the program.	- School referral forms - Daily attendance records - Qualitative Notes on student's participation and behavior - Service Notes
75% of students completing community service hours at Boomerang will complete at least 5 hours of service.	Community Service hours offered Tuesday-Thursday from 4-6pm, as well as 3 designated community service days, providing students the opportunity for civic engagement while completing school-required or court-ordered service hours.	At least 20 students will fulfill their community service hours at Boomerang. Of these, 15 students will complete at least 5 hours of service.	- Incoming community service referral forms - Daily timesheets - Reports on participant hours to Volunteers for Youth for students under 16 years - Reports on participant hours to Adult Community Service for students 16 years and older
50% of youth attending Boomerang's "What's Next?" workshops will complete at least 2 group sessions.	Boomerang will provide at least 6 weeks of once weekly "What's Next" workshops on topics related to post secondary education, job exploration, and life skills, in Fall and Spring of the school year.	At least 25 students will attend the "What's Next?" series. Of these, at least 12 students will complete 2 group sessions.	- Attendance records - Post-session surveys
50% of youth identified for intensive follow up services will report/demonstrate an increase in social connectedness by end of the school year.	Providing a cohort of identified youth with additional support extending beyond their suspension period, through sustained contact via social media, reunions and other afterschool programming.	Of the 15 students identified for intensive follow-up services, at least half will regularly engage with Boomerang staff, improve relations with their school administrators/teachers, maintain social media contact with Boomerang, attend monthly reunions and participate in afterschool programming at Boomerang.	- After school attendance records - Qualitative Notes from Boomerang staff - Communications with school representatives - Social media logs - "Change readiness" surveys

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Chapel Hill-Carrboro YMCA - The Boomerang Program**

		Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
PROGRAM REVENUE					
Private Donations		$ 1,100	$ 475	$ 500	5%
Program Generated Revenue (fees)		$ -	$ -	$ -	0
Local Government Grants:					
Orange County		$ 5,000	$ 5,000	$ 7,000	40%
Town of Chapel Hill		$ 2,000	$ 2,000	$ 5,000	150%
Town of Carrboro		$ 800	$ 1,500	$ 3,000	100%
Other Local:	JCPC	$ 34,802	$ 32,760	$ 35,000	7%
Other Local:	School Districts: CHCCS, OCS	$ 30,000	$ 30,000	$ 30,000	0%
Other Local:					0
	If more than 3 sources, please provide a separate list.				
Non-Local Government Grants					
Triangle United Way		$ 14,767	$ 15,000	$ 15,000	0%
State Government					0
Federal Government					0
Other Grants:	Oak Foundation	$ 50,000	$ 50,000	$ 50,000	0%
	CHCYMCA	$ 20,000	$ 20,000	$ 20,000	0%
Other Grants:	Other Foundations	$ 16,000	$ 10,000	$ 15,000	50%
Miscellaneous/Other Revenue		$ 4,455	$ 13,267	$ -	-100%
Please list 3 largest Miscellanous sources:					
CHCYMCA					
Total Program Revenue		**$ 178,924**	**$ 180,002**	**$ 180,500**	**0%**
PROGRAM EXPENSES					
Compensation		$ 153,022	$ 151,717	$ 153,000	1%
Rent & Utilities		$ -	$ -	$ -	0
Supplies & Equipment		$ 5,063	$ 2,640	$ 4,000	52%
Travel & Training		$ 2,057	$ 520	$ 750	44%
Other Expenses:					0
Please list 3 largest "Other Expenses":					
Contract Services	$ 16,261.00	$ 16,261	$ 21,725	$ 20,000	
Food for Students	$ 2,521.00	$ 2,521	$ 3,400	$ 3,500	
	$ -				
Total Program Expenses		**$ 178,924**	**$ 180,002**	**$ 181,250**	**1%**
SURPLUS/(DEFICIT) FOR PERIOD:		**$ -**	**$ -**	**$ (750)**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]:

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	719	648	$178,924	276
Estimated FY14-15	695	625	$173,811	278
Projected FY15-16	695	625	$175,000	280

One Unit of Service is defined as follows:

1 student referral with 2-4 day suspension (ATS; including 2-day court-involved) = 1 unit of service
1 student referral with 5-7 day suspension (ATS) = 2 units of service
1 student referral with 8-10+ day suspension (ATS) = 3 units of service
1 student instance (students completing at least 5 community service hours) (CS) = 1 unit of service
1 student referral receiving intensive follow-up services = 3 units of service
1 student instance attending at least 1 *What's Next* group = 1 unit of service
1 student attending *Open Doors* = 0.5 unit of service

Please note the change in accounting for units of service for Community Service and What's Next

2013-14 Program Component	Units Served	Units Meeting Program Goals
ATS 2-4 days	131	131
ATS 5-7 days	68	68
ATS 8+ days	78	78
Community Service (instances)	180	142
What's Next? (instances)	65	32
Intensive Follow Up	45	45
After School Open Doors	152	152
TOTAL	**719**	**648**

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	147	130	130	Durham City	1	0	0
Female	45	35	35	Durham County	0	0	0
2. **Ethnicity**				Raleigh City	0	0	0
African-American	78	65	65	Wake County	0	0	0
Caucasian	63	55	55	Town of Chapel Hill	80	70	70
Hispanic	40	35	35	Town of Carrboro	29	25	25
Other	11	10	10	Orange County	79	70	70
3. **Age**				Other: Chatham	3	0	0
0-5 Years	0	0	0	Per cent of clients at, or below, federal poverty level - **of families that report income**	97	82	82
6-18 Years	181	160	160				
19-50 Years	11	5	5				
51+ Years							
Unknown				***TOTAL # OF CLIENTS SERVED***	192	165	165

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Chapel Hill-Carrboro YMCA

AGENCY REVENUE	Actual 2013	Estimated 2014	Projected 2015	Percent Change
Private Donations	$ 259,836	$ 283,600	$ 263,600	-7%
Agency Generated Revenue (fees)	$ 4,970,331	$ 4,761,315	$ 3,489,863	-27%
Local Government Grants:				
Orange County	$ 5,000	$ 5,000	$ 7,000	40%
Town of Chapel Hill	$ 8,500	$ 20,000	$ 20,000	0%
Town of Carrboro	$ 1,500	$ 1,500	$ 3,000	100%
Other Local: JCPC	$ 34,802	$ 32,760	$ 35,000	7%
Other Local: School Districts: CHCCS, OCS	$ 30,000	$ 30,000	$ 30,000	0%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 14,767	$ 20,864	$ 22,700	9%
State Government				0
Federal Government				0
Other Grants:	$ 47,668	$ 78,890	$ 79,560	1%
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 5,372,404**	**$ 5,233,929**	**$ 3,950,723**	**-25%**
AGENCY EXPENSES				
Compensation	$ 3,268,218	$ 3,260,511	$ 2,277,704	-30%
Rent & Utilities	$ 362,500	$ 359,085	$ 613,657	71%
Supplies & Equipment	$ 1,366,577	$ 1,123,559	$ 747,463	-33%
Travel & Training	$ 147,901	$ 161,546	$ 139,746	-13%
Other Expenses:	$ 373,208	$ 329,239	$ 172,153	-48%
Please list 3 largest "Other Expenses":				
Depreciation $ 214,037.00				
National YMCA Council $ 80,725.00				
Marketing $ 78,446.00				
Total Agency Expenses	**$ 5,518,404**	**$ 5,233,940**	**$ 3,950,723**	**-25%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (146,000)**	**$ (11)**	**$ -**	**100%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Boomerang Program Director	1.00		54,485	67,568	67,568		R, H
Program Manager	1.00		34,300	47,882	47,882		R, H
Office Manager	1.00		27,121	19,480 (PT)	19,480 (PT)		R, H in 2013-14
Program Specialist	0.50		14,468	14,985	14,985		
Inclusion Facilitator	0.15		1,802	1,802	1,802		
VOLUNTEER HOURS (MSW interns, APPLES volunteers)+	0.5					N/A	

Notes: The Chapel Hill-Carrboro YMCA is now part of the YMCA of the Triangle, and is transitioning to their financial system. Full time staff salaries for 2014-15 include retirement and a cost of living adjustment.

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: CHARLES HOUSE ASSOCIATION

Street Address: 109 HILLCREST AVE.

Mailing Address: CARRBORO, NC 27510

Executive Director: PAUL KLEVER

Telephone: 919-967-7570 E-Mail: paul@charleshouse.org

Contact Person: PAUL KLEVER

Telephone: 919-967-7570 E-Mail: paul@charleshouse.org

Fax: 919-967-7576 Federal ID Number: 58-1582881

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$ 15,000	$ 25,000
Summary of intended use of funds: To support Charles House community eldercare services, which support care giving families from Orange County and their aging family members. The increased request is in support of Charles House's expansion into the new Center for Community Eldercare at 7511 Sunrise Rd, Chapel Hill.		
Town of Chapel Hill	$ 9,000	$ 15,000
Summary of intended use of funds: To support Charles House community eldercare services for care giving families from Chapel Hill. The additional request is in support of Charles House's expansion into the new Center for Community Eldercare at 7511 Sunrise Rd, Chapel Hill.		
Town of Carrboro	$ 4,000	$ 4,500
Summary of intended use of funds: To support Charles House community eldercare services for care giving families from Carrboro.		

Executive Director Board Chair

Date Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:
      Charles House Association was incorporated in 1984 and began operating the daytime eldercare program in Carrboro in 1990.

   b. Years in Operation:
      Charles House will mark its 25th anniversary in June, 2015.

   c. Mission or Vision Statement (if applicable):
      Charles House is a private, nonprofit organization whose mission is threefold:
      i. Enriching the lives of seniors
      ii. Supporting families caring for aging family members
      iii. Representing the community's commitment to its elders

   d. Brief History of Agency:
      Since 1990, Charles House has been the premier adult day program for caregiving families in the community, earning a reputation both locally and statewide as a model for adult day care in a home-like environment. Charles House has up to 22 participants each day, Monday through Friday, 7:30 to 5:30 and occasional Saturdays.
      In March, 2011, Charles House Association opened our community's first nonprofit Eldercare Home. Charles House-Yorktown is a home providing 24/7 care for elders. This pilot which combines the leadership of a nonprofit elder services organization, the welcoming enthusiasm of a neighborhood and the state regulations for Family Care Homes, is a model for our community and state. The second Charles House neighborhood Eldercare opened in the Winmore neighborhood September, 2014.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. **Describe the identified community need(s) the Program(s) funded will address.**

   Charles House was established by a caregiving family who knew all too well the demands placed upon family caregivers and that our community needed a dignified, caring and respectful place for elders to be cared for and engaged during the day.
   Our community is experiencing a growing elderly population, both from increased longevity and from new citizens relocating to our community. Even the increase in working families has a ripple-effect of attracting aging parents to our area to be near family and services. These working families often find themselves "sandwiched"

between two generations needing their care, guidance and support. Charles House is here as a partner in caring for those dealing with aging parents/relatives.

The success of expanding options for quality, non-institutional eldercare in our community will depend upon the participation and support of the larger community, including the financial support of the Outside Agency Funding from the county, Chapel Hill and Carrboro in coming years. The Outside Agency Funding supports the work and mission of Charles House Association generally, but specifically is designated to support the Charles House Scholarship Fund to provide financial assistance to enrolled families in the daytime eldercare center.

3. **Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.**

Charles House is working with Carol Woods Retirement Community to relocate the daytime eldercare program, training and caregiver support programs and administrative functions to a larger building on the edge of the Carol Woods campus that was used for 11 years by the YMCA for a child care center. The larger building will allow Charles House to expand its capacity and programming. The relocation is anticipated by the beginning for the FY-15-16.

4. **Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.**

Charles House funding is based upon four primary sources: 1) Fees charged to enrolled families; 2) Orange County Department on Aging and Department of Social Services purchases of service for families of need; 3) the Outside Agency Funding; and 4) Private donations and foundation grants.

Charles House receives no financial support from state or federal funds, nor reimbursement from health insurance, Medicare or Medicaid.

5. **Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)**

Charles House collaborates with many community organizations and other service agencies:

- Orange County: Department on Aging
- Department of Social Services
- Orange County Animal Shelter
- Chapel Hill Transit E-Z Rider
- N.C. Botanical Gardens
- UNC-Chapel Hill
- UNC Health Care
- Chapel Hill Libraries
- Ackland Art Museum
- Chapel Hill Service League's Christmas House
- IFC's HomeStart Homeless Shelter
- Carol Woods
- Carolina Meadows
- Various home health agencies; area assisted living and nursing care facilities
- Various area schools
- Area civic groups, churches
- Guiding Lights Caregiver Support Center

6. **How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?**

Through past efforts to reach out to the African-American population in our community, African American families continue to make up approximately 10-12% of enrolled families.

7. **Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).**

Category	Youth	Adult	Older Adults	Persons with Disability
Education			**X**	**X**
Health and Nutrition			**X**	**X**
Job Training				
Sports and Arts Activities			**X**	**X**
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other-Dementia Care			**X**	

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
• 50% of enrolled families in the funding year will have the capacity to continue providing care in the home and not require, or delay, residential care placement for their participant/ enrollee.	The Charles House Day Program supports family caregivers by offering respite from the ongoing concerns of caring for a loved one and by supporting the best functioning of their loved ones through participation in the therapeutic program	At the end of the FY, 29 of the 41 families enrolled at the beginning of the FY (70%) were still engaged in caring for their loved ones.	Attendance and discharge records are reviewed to track participants' length of time enrolled and reasons for terminating from program.
• Over 50% of families will report in the annual evaluation survey satisfaction with the Charles House program and will report positive effects of the program for their enrolled family members, such as improvement in their participant/enrollee's behavior, emotional status, physical and/or cognitive functioning.	The relationship Charles House maintains with enrolled families is the basis for the collaboration in caring. The daytime program works to support a variety of functioning abilities for participants: including self-esteem, gross and fine motor skills, social skills, verbal skills, ambulation, memory and reminiscence, activities of daily living.	In the 2013 Caregiver Survey, 1000% of respondent families reported improved functioning in their family members	Charles House conducts a survey of enrolled families annually. Specific questions capture caregivers' evaluation of their loved ones' functioning.
• Charles House Association will continue to surpass the NC Standards and maintain state certification to operate as an adult day care program.	Program administration maintains knowledge of the state regulations for operation of adult day programs and assures that all aspects of the program are in compliance with the rules for annual certification	Charles House received recertification by the State Division of Aging and Adult Services in May, 2014.	The state and Orange County DSS monitor the operations of Charles House and conduct the annual review for certification.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
• 50% of enrolled families in the funding year will have the capacity to continue providing care in the home and not require, or delay, residential care placement for their participant/ enrollee.	The Charles House Day Program supports family caregivers by offering respite from the ongoing concerns of caring for a loved one and by supporting the best functioning of their loved ones through participation in the therapeutic program	Charles House day program will continue to support family caregivers, helping at least 50% of the enrolled families in July, 2015 to continue caregiving to the end of the FY.	Attendance and discharge records are reviewed to track participants' length of time enrolled and reasons for terminating from program.
Over 50% of families will report in the annual evaluation survey satisfaction with the Charles House program and will report positive effects of the program for their enrolled family members, such as improvement in their participant/enrollee's behavior, emotional status, physical and/or cognitive functioning.	The relationship Charles House maintains with enrolled families is the basis for the collaboration in caring. The daytime program works to support a variety of functioning abilities for participants: including self-esteem, gross and fine motor skills, social skills, verbal skills, ambulation, memory and reminiscence, activities of daily living.	It is anticipated that the annual caregiver survey will again show a high percentage (80%+)a of enrolled families reporting improved functioning in their enrolled loved ones.	Charles House conducts a survey of enrolled families annually. Specific questions capture caregivers' evaluation of their loved ones' functioning.
• Charles House Association will continue to surpass the NC Standards and maintain state certification to operate as an adult day care program.	Program administration maintains knowledge of the state regulations for operation of adult day programs and assures that all aspects of the program are in compliance with the rules for annual certification	State re-certification will be maintained.	The state and Orange County DSS monitor the operations of Charles House and conduct the annual review for certification.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Chapel Hill-Carrboro YMCA - The Boomerang Program**

		Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
PROGRAM REVENUE					
Private Donations		$ 1,100	$ 475	$ 500	5%
Program Generated Revenue (fees)		$ -	$ -	$ -	0
Local Government Grants:					
Orange County		$ 5,000	$ 5,000	$ 7,000	40%
Town of Chapel Hill		$ 2,000	$ 2,000	$ 5,000	150%
Town of Carrboro		$ 800	$ 1,500	$ 3,000	100%
Other Local:	JCPC	$ 34,802	$ 32,760	$ 35,000	7%
Other Local:	School Districts: CHCCS, OCS	$ 30,000	$ 30,000	$ 30,000	0%
Other Local:					0
	If more than 3 sources, please provide a separate list.				
Non-Local Government Grants					
Triangle United Way		$ 14,767	$ 15,000	$ 15,000	0%
State Government					0
Federal Government					0
Other Grants:	Oak Foundation	$ 50,000	$ 50,000	$ 50,000	0%
	CHCYMCA	$ 20,000	$ 20,000	$ 20,000	0%
Other Grants:	Other Foundations	$ 16,000	$ 10,000	$ 15,000	50%
Miscellaneous/Other Revenue		$ 4,455	$ 13,267	$ -	-100%
Please list 3 largest Miscellanous sources:					
CHCYMCA					
Total Program Revenue		**$ 178,924**	**$ 180,002**	**$ 180,500**	**0%**
PROGRAM EXPENSES					
Compensation		$ 153,022	$ 151,717	$ 153,000	1%
Rent & Utilities		$ -	$ -	$ -	0
Supplies & Equipment		$ 5,063	$ 2,640	$ 4,000	52%
Travel & Training		$ 2,057	$ 520	$ 750	44%
Other Expenses:					0
Please list 3 largest "Other Expenses":					
Contract Services	$ 16,261.00	$ 16,261	$ 21,725	$ 20,000	
Food for Students	$ 2,521.00	$ 2,521	$ 3,400	$ 3,500	
	$ -				
Total Program Expenses		**$ 178,924**	**$ 180,002**	**$ 181,250**	**1%**
SURPLUS/(DEFICIT) FOR PERIOD:		**$ -**	**$ -**	**$ (750)**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: A day of attendance at Charles House Daytime Eldercare Center

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	5353	5353	$383,800	$71.70
Estimated FY14-15	5200	5200	$398,800	$76.70
Projected FY15-16	7300	7300	$556,000	$76.15

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	30	31	37	Durham City			
Female	42	44	43	Durham County	20	21	25
2. **Ethnicity**				Raleigh City			
African-American	9	10	12	Chatham County	12	13	15
Caucasian	62	63	75	Town of Chapel Hill	30	31	37
Hispanic	1	2	3	Town of Carrboro	6	7	9
Other				Orange County	3	3	4
3. **Age**				Other (Alamance)	1		
0-5 Years							
6-18 Years				Percent of clients at, or below, federal poverty level			
19-50 Years							
51+ Years	72	75	90				
Unknown				***TOTAL # OF CLIENTS SERVED***	72	75	90

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Chapel Hill-Carrboro YMCA

AGENCY REVENUE	Actual 2013	Estimated 2014	Projected 2015	Percent Change
Private Donations	$ 259,836	$ 283,600	$ 263,600	-7%
Agency Generated Revenue (fees)	$ 4,970,331	$ 4,761,315	$ 3,489,863	-27%
Local Government Grants:				
Orange County	$ 5,000	$ 5,000	$ 7,000	40%
Town of Chapel Hill	$ 8,500	$ 20,000	$ 20,000	0%
Town of Carrboro	$ 1,500	$ 1,500	$ 3,000	100%
Other Local: JCPC	$ 34,802	$ 32,760	$ 35,000	7%
Other Local: School Districts: CHCCS, OCS	$ 30,000	$ 30,000	$ 30,000	0%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 14,767	$ 20,864	$ 22,700	9%
State Government				0
Federal Government				0
Other Grants:	$ 47,668	$ 78,890	$ 79,560	1%
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 5,372,404**	**$ 5,233,929**	**$ 3,950,723**	**-25%**
AGENCY EXPENSES				
Compensation	$ 3,268,218	$ 3,260,511	$ 2,277,704	-30%
Rent & Utilities	$ 362,500	$ 359,085	$ 613,657	71%
Supplies & Equipment	$ 1,366,577	$ 1,123,559	$ 747,463	-33%
Travel & Training	$ 147,901	$ 161,546	$ 139,746	-13%
Other Expenses:	$ 373,208	$ 329,239	$ 172,153	-48%
Please list 3 largest "Other Expenses":				
Depreciation $ 214,037.00				
National YMCA Council $ 80,725.00				
Marketing $ 78,446.00				
Total Agency Expenses	**$ 5,518,404**	**$ 5,233,940**	**$ 3,950,723**	**-25%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (146,000)**	**$ (11)**	**$ -**	**100%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: CHARLES HOUSE ASSOCATION

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1.0	0.25%	26,500	20,000	21,000	7.2%	(H); (R)
Associate Director	1.0	0.33%	25,500	27,000	30,000	6.9%	(H); (R)
Program Administrator	1.0	100%		25,000	50,000		(H); (R)
Program Directors	3.0	100%	104,100	104,100	106,000	27%	(H); (R)
Program Facilitators	3.5	100%	46,150	46,150	90,300	12%	(H); (R)
Administrative Assistant	0.8	50%	10,800	12,500	12,750	5.8%	(H); (R)
Cook	1.2	100%	29,000	29,400	32,500	7.6%	(H); (R)
Volunteers	>1.50						
*Portion of FTE allocated to daytime program							

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Child Care Services Association

Street Address: 1829 E. Franklin St., Chapel Hill, NC 27514

Mailing Address: PO Box 901, Chapel Hill, NC 27514

Website Address: www.childcareservices.org

Executive Director: Anna Carter

Telephone: 919-967-3272 E-Mail: annac@childcareservices.org

Contact Person: Linda Chappel

Telephone: 919-403-6950 E-Mail: lindac@childcareservices.org

Fax: 919-403-6959 Federal ID Number: 56-1514058

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$0	$35,000
Summary of intended use of funds: Funds obtained from Orange County Government will be spent on the **Child Care Scholarship Program**. The majority of the money will be spent on direct scholarships (payments to providers) to provide partial scholarships for children in high quality child care programs.		
Town of Chapel Hill	$9,000	$12,500
Summary of intended use of funds: Funds obtained from the Town of Chapel Hill will be spent on the **Child Care Scholarship Program**. The majority of the money will be spent on direct scholarships (payments to providers) to provide partial scholarships for children in high quality child care programs.		
Town of Carrboro	$4,500	$7,500
Summary of intended use of funds: Funds obtained from the Town of Carrboro will be spent on the **Child Care Scholarship Program**. The majority of the money will be spent on direct scholarships (payments to providers) to provide partial scholarships for children in high quality child care programs.		

Executive Director

Board Chair

Date

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 1986

   b. Years in Operation: 41 years

   c. Mission or Vision Statement (if applicable):
   The mission of Child Care Services Association (CCSA) is to ensure that affordable, accessible, high quality child care is available for all young children and their families. The agency has five goals: (1) to ensure that no family pays more than 10-12% of its gross earnings to purchase child care for one child; (2) to ensure that high quality child care is accessible to all children; (3) to ensure that all child care is of high quality; (4) to model how services are delivered to young children and their families and child care providers; and, (5) to be a financially viable, strong, effective organization.

   d. Brief History of Agency:
   Child Care Services Association is a state and national leader in the development and implementation of effective, sustainable initiatives and systems that transform the lives of diverse families, child care professionals, early childhood programs, its leadership and staff into change-agents for better outcomes for all young children.

   Child Care Services Association began as two independent agencies. Day Care Services Association began as a committee of the United Way in Orange County in 1975 and became incorporated in 1986. The Durham Day Care Council was founded in 1974 after the United Way convened a planning group of community leaders to address the growing need for child care in Durham County. It was incorporated in 1976. The two agencies merged on July 1, 1999 to better meet the needs of families and child care providers in both communities and became known as Child Care Services Association (CCSA). In July 2004, CCSA began providing child care resource and referral services in Wake County because the agency serving that community went out of business and the NC Division of Child Development requested that CCSA take over services at that time. Since that time, CCSA has served as the single, state-designated child care resource and referral (CCR&R) agency for Orange, Durham, and Wake counties, as well as a regional lead agency, and state management hub for all CCR&R services in North Carolina.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Child Care Services Association (CCSA)'s Child Care Scholarship Program provides financial assistance for child care payments to families living in Orange County who are working, in school and/or looking for work and needing child care for their children ages 0-12 years old. The focus of the program is to enable parents to work and/or go to school, and therefore enhance their self-sufficiency, and ensure that children are provided the early care and education opportunities that will promote optimal growth and development.

Research shows that child care is a basic need that makes a significant difference in the developmental and life outcomes of children and the economic health and security of families. A wealth of evidence-based programs and longitudinal research studies *(Carolina Abecedarian Project, Perry Preschool Project, Chicago Child-Parent Centers)* document the consistent link between high quality child care and improved cognitive, academic, and social skills for children, with gains maintained into adulthood. This research also informs us that quality care has the greatest impact on children in low-income families. Child care also helps families sustain their participation in the workforce, reduce dependency on public assistance, and move out of poverty. Studies have found that the availability of stable child care can decrease employee absences by 20-30% and reduce turnover by 37-60%,[1] and when low-income families receive assistance with child care, they are more likely to enter and remain in the workforce and work more hours.[2]

Child care costs more than most families can afford. The average annual cost for child care in Orange County for an infant in a 5-star center is over $16,000.[3] This represents over 50% of the gross earnings of a family making $30,000 a year. There are 8,215 children under 6 years old and 9,956 children 6-12 years old in Orange County, approximately 68% of whom are living in families with child care needs.[4] According to the U.S. Census Bureau, there are almost 1,900 (23%) children under the age of 6 and over 1,600 (16%) children 6-12 years old in Orange County living below federal poverty guidelines, and over 6,200 (34%) children birth to 12 living in low-income families (i.e., at or below 200 percent of the federal poverty level).[5]

The ability of the Orange County Department of Social Services (OCDSS) to meet the child care needs of these families is limited both by resources and policy guidelines. In October, 2014, only 804 children were accessing child care subsidy services through OCDSS and there was a waiting list of 297 children.[6] Compounding the difficulty for families of accessing these limited funds was the various changes to the state's child care subsidy guidelines that went into effect in October 2014 and January 2015. These guidelines have resulted in reduced eligibility of families for subsidy vouchers and

[1] Shellenback, Karen, Child Care & Parent Productivity: Making the Business Case, December 2004.
[2] Erdal, Tekin, Child Care Subsidy Receipt, Employment and Child Care Choices of Single Mothers, 2004.
[3] CCSA Child Care Supply and Demand data, June, 2014.
[4] Table B23008, 2009-2013 American Community Survey, 5-year estimates, US Census Bureau.
[5] Table B17024, 2009-2013 American Community Survey, 5-year estimates, US Census Bureau.
[6] Subsidy Expenditure Report, North Carolina Division of Child Development and Early Education, November, 2014.

increases in the cost-sharing burden for families receiving assistance, in many cases ruling out the feasibility of accepting vouchers for these families. One of the groups most affected by these changes has been families with school-age children, whose income-eligibility for vouchers was reduced from 75% of state median income to 133% of the Federal Poverty Level and whose share of fees increased in many cases to four-fold of what they had been paying. This change began in October 2014, and will be implemented over a one-year period. Data indicate an approximate 16% decrease in school-age children receiving OCDSS child care subsidies between September and November of 2014 when these changes first went into effect.[7] That number will continue to grow over subsequent months as this is fully implemented.

In the context of the current child care subsidy landscape and recent policy changes, CCSA's Scholarship program offers an important, additional alternative to child care financial assistance. CCSA's ability to set eligibility guidelines, priorities for services, and other programmatic policies for the Scholarship Program at the *local*, as opposed to state level, offers the flexibility and opportunity to tailor services to better meet the needs of our local community. Current income-eligibility guidelines for CCSA child care scholarships, for instance, are based on *county* median income levels (as opposed to the state's recent turn to Federal Poverty guidelines), and cost-sharing for parent fees is pro-rated based on amount of child care used, not charged at a flat, full-time rate as recently instituted by the state.

CCSA's scholarship program is intended to serve as a bridge for families who are waiting, unable, or no longer able to qualify for child care assistance through DSS. Families who are eligible are required to enroll on DSS child care subsidy waiting lists with the goal of transitioning to DSS subsidy vouchers when they become available, thereby supporting continuity of care and maximizing child care resources in the community to the greatest extent possible. Similarly, CCSA has prioritized families transitioning off DSS subsidies in order to support continuity of care for children and provide families with more time to establish employment stability and financial self-sufficiency.

With additional funding for the Scholarship Program, CCSA hopes to create additional priorities for services to address emerging need areas in Orange County. In addition to working and student parents that are served on a greatest need (i.e., lowest income) basis, current Orange County priorities include homeless families, teen parents, and families with children with special needs. Based on the drastic changes in state child care subsidy policies which have greatly reduced the number of school-age children being served on vouchers, CCSA proposes to create an additional priority for school-age children with the goal of supporting some of the school-age children who have lost or had to forfeit vouchers from OCDSS.

Similarly, CCSA would like to employ the flexibility of determining local service priorities for Scholarships to support the work of the Orange County Family Success Alliance. Twelve to 16% of CCSA's Orange County Scholarship recipients have resided

[7] Subsidy enrollment reports for service months September & November 2014, DCDEE Data Warehouse

in priority Zones 4 and 6 in FY14 and FY15. CCSA will be participating in the activities of these Zones to study needs, map out resources and services, identify priorities, and improve services for children and families in the Zones. While this work is new and developing, CCSA will make every effort to engage in dialogue and explore the role child care financial assistance and CCSA's local Scholarship program can play in supporting goals in the Zones.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.
At this time, CCSA does not have any significant changes planned for FY15-16, however, the agency will continue to monitor the funding and legislative landscape and implement any program changes necessitated by the evolution of funding requirements, state subsidy system changes, and/or adjustments to the program's financial resources.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.
CCSA's Child Care Scholarship Program for Orange County is supported by ongoing funding from The United Way of the Greater Triangle, the University of North Carolina at Chapel Hill, St. Thomas More church, the Towns of Carrboro and Chapel Hill, and private donations.

Funding from the University of North Carolina at Chapel Hill is highly variable, as a significant portion of CCSA's grant is based on the collection of student fees on a per semester basis. At this time, ongoing funding from United Way of the Greater Triangle remains unclear and uncertain due to recent changes in United Way's funding priorities and strategies.

CCSA continually seeks out new and additional resources to be able to serve more children and families in need in Orange County through ongoing fund development efforts. Funding proposals and applications are developed and submitted on an ongoing basis.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- Orange County Child Care Programs and Community Service Providers: CCSA provides *on-site* education and referral support to families at child care program and other community-based locations. CCSA has assisted child care programs that have needed to close their doors (e.g., FPG Child Development Center, the Children's Center at Carol Woods) by meeting with parents and providing referral assistance in the evenings at their child care programs. CCSA has also provided on-site assistance at NCPreK events and participated in community events with St.

Thomas More and El Centro Latino, among others. CCSA's Technical Assistance and Training departments work extensively with Orange County child care programs to provide support services and professional development opportunities to improve the quality of care and education being provided to Orange County children in these settings.

- Orange County Department of Social Services (DSS): As prior administrator of the Orange County Smart Start Subsidy program, CCSA worked collaboratively with the Orange County Department of Social Services to ensure that families received the appropriate source of child care subsidy funds; to collaboratively establish and provide uniform child care subsidy reimbursement rates with the help of other partners like Smart Start; to provide integrated training activities for Orange County child care providers; and to make recommendations to the community through various work groups. CCSA has continued to collaborate with OCDSS to provide families receiving subsidy funds through DSS with child care education and referral services. CCSA's fully bilingual counselors are made available to support DSS families and staff on an ongoing basis, either in person or by phone. Staff also conduct quarterly workshops on Choosing Quality Child Care for Work First clients at Orange County's DSS offices in Hillsborough.

- Orange County Partnership for Young Children: CCSA has collaborated extensively with the Orange County Partnership for Young Children since the origins of Smart Start and the Orange County Partnership. Collaboration has included a prior, 15-year history delivering Scholarship services, and currently includes partnership in the implementation and delivery of technical assistance, training, and workforce development strategies.

- Third Sector Alliance: CCSA participates in the Third Sector Alliance, which is a collaborative of non-profit and human service agencies in Orange County. The group composed of personnel from these agencies meets periodically to discuss the service needs of Orange County residents and to explore the possibility for coordinating efforts to meet these needs.

- UNC- Chapel Hill: CCSA is an active member of the UNC Child Care Advisory Committee. This committee seeks to address the parenting and child care needs of the University community and oversees a child care allocation set aside for UNC students and University employees. Benefits to eligible Orange County residents include the provision of child care scholarship and referral services.

- Family Success Alliance: CCSA has recently begun participating in the collaborative work of the Family Success Alliance, the initiative currently led by the Orange County Health Department to improve services and outcomes for children and families in specified high needs areas of Orange County. CCSA has begun to attend meetings of the priority Zones (4 & 6) and will be an engaged participant in the efforts to study needs, map out resources and services, identify priorities, and improve services for children and families in the Zones.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?
Child Care Services Association is an advocate for all children and child care providers, regardless of their ethnic or minority status. Each year CCSA undertakes public awareness events and activities locally, statewide and nationally. These events and activities raise the awareness of people within all communities about the critical role of early education for all children, particularly those of ethnic and minority groups most at risk for poverty, linguistic isolation, and lack of access to needed services.

Through CCSA's Family Support program, referral and scholarship counselors reach out to families of all ethnic and economic backgrounds through educational sessions and family-centered community events and fairs. Because of this, 45% of Orange County families provided with inter-personal education and referral services in FY14 were members of a minority group, with over 10% of those families being Latino. Fifty-one percent of Orange County families receiving inter-personal education and referral services were low-income, with family incomes below $40,000 per year. Fifty-eight percent of Orange County Scholarship recipients were of an ethnicity/race other than Caucasian, with 39% being of African-American or Hispanic descent.

In an effort to reach out to the Latino population in Orange County, many of CCSA's outreach events are conducted in Spanish by bilingual counselors. In addition to offering services in Spanish at our office in Chapel Hill, on the University of North Carolina Chapel Hill (UNC-CH) campus, and, by request, on-location at agencies serving Latino families (such as El Centro, in Carrboro), staff members conduct ongoing outreach to Hispanic/Latino businesses and other agencies with large Latino clientele to ensure employed parents know about services available to them. CCSA historically has participated in various task forces that work on issues affecting the Latino community in Orange County, including CALDO (Comite de Asuntos Latinos de Orange), and continues to participate in local events that provide information to the Latino community, such as church and community-based family fairs. CCSA has also conducted outreach to the Latino population by participating in Spanish-language radio shows through WCOM, the local radio station based in Carrboro, and by posting bilingual placards on the Chapel Hill transit system.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X			
Health and Nutrition				
Job Training				
Sports and Arts Activities				

Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other: Employment & Training Support		X		

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
The goal of the program is to 1) assist families in attaining and sustaining employment by providing financial assistance/ scholarships for child care, as a result of which families will pay no more than 10% of their gross earnings for a child in care; and 2) provide children access to high quality child care that will facilitate their growth and development.	Program activities for FY13-14 included: • Accepting applications from Orange County families seeking assistance with child care for children birth to 12 years old. • Determining family-eligibility based on family income and activity requirements. • Awarding scholarships based on enrollment priorities and program guidelines. Families were awarded scholarships based on greatest need (i.e., lowest income). • Assisting families in finding and selecting high-quality child care so that children receiving scholarships could be placed in 4-5 star licensed child care facilities. • Assessing parental contribution to child care expenses by assigning monthly parent fees based on family income. Parent fees were 10% of	As of June 30, 2014: 1. 117 children of families living or working in Orange County received scholarships. The average number of months of service per child was 9.2 months and the average (direct subsidy) cost was $467.78 per month; 2. 97% of families completing CCSA's program outcome and customer service evaluation surveys reported being satisfied with Scholarship services. 97% of families felt treated with respect by Scholarship program staff and 98% of families would use CCSA's services again; and 3. 100% of children receiving a scholarship through CCSA were enrolled in a center or home with a 4 or 5 star rating.	• Data on all families and children receiving scholarships were entered into a computer database. At the end of the fiscal year, summaries of service were created to profile those applicants receiving assistance and the level of assistance provided. • A 20% random sample of all families receiving scholarships were selected and surveyed during the year. The sample was stratified based on language of services and type of scholarship received. • Payment records were evaluated and compared to child care facility licensing information provided by the

	the family's gross income for the first child, 4% for the second child and 1% for each additional child. • Reimbursing child care programs monthly for care used by children on scholarship.		NC Division of Child Development and Early Education to determine the proportion of children enrolled in 4 and 5 star licensed homes and centers.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
The goal of the program is to 1) assist families in attaining and sustaining employment by providing financial assistance/ scholarships for child care, as a result of which families will pay no more than 10% of their gross earnings for a child in care; and 2) provide children access to high quality child care that will facilitate their growth and development.	For FY15-16, Child Care Scholarship Counselors will: • Accept applications from Orange County families seeking assistance with child care for children birth to 12 years old. Applications are available to families at all participating child care programs, the Orange County Department of Social Services, UNC-Chapel Hill and other community locations. All materials and services are provided in English and Spanish. All Scholarship Counselors are bilingual and available throughout the week, and evening and weekend appointments are available as needed. • Determine family-eligibility based on family income and activity requirements. Income requirements are based on median income levels for Orange County (as opposed to the state median income guidelines used by DSS). Families are required to be working, looking for work, or	1) By June 30, 2016, scholarships will be provided for 121 children of low- to moderate-income families living or working in Orange County at an average (direct subsidy) cost of $562.78 per month for an average of 8.1 months. 2) By June 30, 2016, 95% of parents receiving scholarships will report that they were treated with respect and satisfied with services. 3) By June 30, 2016, 95% of the children receiving scholarships through the program will be enrolled in a center or home with a 4- or 5-star rating.	• Data on all families and children receiving scholarships are entered into a computer database. At the end of the fiscal year, summaries of service are created to profile those applicants receiving assistance and the level of assistance provided. *(The number of families able to receive assistance during the year is often affected by things that cannot be predicted, such as changes in federal legislation or child care subsidy waiting lists in the community)* • A 20% random sample of all families receiving scholarships will be selected and surveyed during the year. The sample will be stratified based on language of services and type of scholarship received.

	attending school. Family eligibility is re-assessed and scholarships are renewed/ recertified on an annual basis, at minimum. Eligibility may be reviewed more regularly depending on the nature of a family's qualifying activities or the stability of their income. In addition, families are required to report any changes in income, employment or family status as they occur, between review/recertification periods. • Award scholarships based on enrollment priorities and program guidelines. Families are awarded scholarships based on greatest need (i.e., lowest income). Enrollment priorities include homeless families, teen parents, and children with special needs. Priorities may be expanded, based on funding, to include school-age children and children residing in FSA priority Zones. Families are required to enroll on DSS child care subsidy waiting lists with the goal of transitioning to DSS subsidy vouchers when they become available. • Assist families in finding and selecting high-quality child care. Children receiving new scholarships are required to be placed in 4-5 star licensed child care facilities. Scholarship counselors are trained to assist families in understanding		• Payment records will be evaluated and compared to child care facility licensing information provided by the NC Division of Child Development and Early Education to determine the proportion of children enrolled in 4 and 5 star licensed homes and centers.

	their child care options and providing referrals. • Assess parental contribution to child care expenses by assigning monthly parent fees based on family income. Parent fees are 10% of the family's gross income for the first child, 4% for the second child and 1% for each additional child • Reimburse child care programs monthly for care used by children on scholarship (reimbursement amounts are set at the lesser of a child care program's tuition rate or a CCSA-set, maximum reimbursement rate, minus the parent fee amount).		

Section III. Program Budget
(Excel file)

Child Care Scholarship Program – Orange County Government Request

AGENCY NAME: CHILD CARE SERVICES ASSOCIATION

	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
PROGRAM REVENUE				
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ -	$ -	$ 35,000	0
Town of Chapel Hill	$ 7,000	$ 9,000	$ 12,500	39%
Town of Carrboro	$ 4,000	$ 4,500	$ 7,500	67%
Other Local:	$ -	$ -	$ -	0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 108,783	$ 122,924	$ 122,924	0%
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 470,651	$ 543,738	$ 502,238	-8%
Please list 3 largest Miscellanous sources:				
University of North Carolina $498,638.00				
St Thomas More $ 3,600.00				
$ -				
Total Program Revenue	**$ 590,434**	**$ 680,162**	**$ 680,162**	**0%**
PROGRAM EXPENSES				
Compensation	$ 52,027	$ 87,470	$ 87,470	0%
Rent & Utilities				0
Supplies & Equipment	$ 260	$ 395	$ 395	0%
Travel & Training	$ -	$ 193	$ 193	0%
Other Expenses:	$ 538,147	$ 592,104	$ 592,104	0%
Please list 3 largest "Other Expenses":				
Child Care Scholarship $550,000.00				
Other Expenses (Overhead) $ 35,981.00				
$ -				
Total Program Expenses	**$ 590,434**	**$ 680,162**	**$ 680,162**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Child Care Scholarship Program – Town of Chapel Hill Request

AGENCY NAME: CHILD CARE SERVICES ASSOCIATION

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ -	$ -	$ 35,000	0
Town of Chapel Hill	$ 7,000	$ 9,000	$ 12,500	39%
Town of Carrboro	$ 4,000	$ 4,500	$ 7,500	67%
Other Local:	$ -	$ -	$ -	0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 108,783	$ 122,924	$ 122,924	0%
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 470,651	$ 543,738	$ 502,238	-8%
Please list 3 largest Miscellanous sources:				
University of North Carolina $498,638.00				
St Thomas More $ 3,600.00				
$ -				
Total Program Revenue	**$ 590,434**	**$ 680,162**	**$ 680,162**	**0%**
PROGRAM EXPENSES				
Compensation	$ 52,027	$ 87,470	$ 87,470	0%
Rent & Utilities				0
Supplies & Equipment	$ 260	$ 395	$ 395	0%
Travel & Training	$ -	$ 193	$ 193	0%
Other Expenses:	$ 538,147	$ 592,104	$ 592,104	0%
Please list 3 largest "Other Expenses":				
Child Care Scholarship $550,000.00				
Other Expenses (Overhead) $ 35,981.00				
$ -				
Total Program Expenses	**$ 590,434**	**$ 680,162**	**$ 680,162**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Child Care Scholarship Program – Town of Carrboro Request

AGENCY NAME: CHILD CARE SERVICES ASSOCIATION

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ -	$ -	$ 35,000	0
Town of Chapel Hill	$ 7,000	$ 9,000	$ 12,500	39%
Town of Carrboro	$ 4,000	$ 4,500	$ 7,500	67%
Other Local:	$ -	$ -	$ -	0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 108,783	$ 122,924	$ 122,924	0%
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 470,651	$ 543,738	$ 502,238	-8%
Please list 3 largest Miscellanous sources:				
University of North Carolina $498,638.00				
St Thomas More $ 3,600.00				
$ -				
Total Program Revenue	**$ 590,434**	**$ 680,162**	**$ 680,162**	**0%**
PROGRAM EXPENSES				
Compensation	$ 52,027	$ 87,470	$ 87,470	0%
Rent & Utilities				0
Supplies & Equipment	$ 260	$ 395	$ 395	0%
Travel & Training	$ -	$ 193	$ 193	0%
Other Expenses:	$ 538,147	$ 592,104	$ 592,104	0%
Please list 3 largest "Other Expenses":				
Child Care Scholarship $550,000.00				
Other Expenses (Overhead) $ 35,981.00				
$ -				
Total Program Expenses	**$ 590,434**	**$ 680,162**	**$ 680,162**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: One unit of service is one month of scholarship/paid child care expense for one child.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	1,081	100%*	$590,434 $505,668 (direct scholarships)	$546.19 $467.78 (direct scholarships)
Estimated FY14-15	1,019	100%*	$680,162 $550,000 (direct scholarships)	$667.48 $539.55[8] (direct scholarships)
Projected FY15-16	977	100%*	$680,162 $550,000 (direct scholarships)	$696.17 $562.78 (direct scholarships)

* The CCSA Child Care Scholarship program guidelines ensure that no family pays more than 10% of their gross earnings for child care. CCSA pays providers based on market rates and families pay providers parent fees of no more than 10% of their gross earnings. Together, these payments usually cover most, but not always all, of the provider's full rate. When there is a difference, providers have some flexibility in whether they choose to charge this amount to parents, and while Orange County providers historically have not done so, this is not an element of cost that can be calculated for the purposes of this chart.

[8] The cost of a direct scholarship is based on the age of the child enrolled into care and the type of care selected by the parent for the child, neither of which is controlled by the Scholarship program. As a result, the average cost per child can fluctuate widely. FY15 monthly costs per child have increased in part due to these factors but primarily due to an increase in statewide and CCSA reimbursement rates of child care providers put into effect in January, 2015. This rate increase will be more fully realized in the direct cost per scholarship estimated for FY16.

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Child Care Scholarship Program

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	51	55	53	Durham City	25	27	26
Female	66	71	68	Durham County			
2. **Ethnicity**				Raleigh City	4	4	4
African-American	33	36	34	Wake County	5	5	5
Caucasian	49	53	51	Town of Chapel Hill	59	64	61
Hispanic	13	14	13	Town of Carrboro	13	14	13
Other	22	24	23	Orange County	4	4	4
3. **Age**				Other (specify): Alamance,	7	8	7
0-5 Years	108	116	112	Carteret, Chatham, & Guilford Counties			
6-18 Years	9	10	9	Per cent of clients at, or below, federal poverty level	19%	19%	19%
19-50 Years							
51+ Years							
Unknown				***TOTAL # OF CLIENTS SERVED***	117	126	121

Section VI.
Comparative Budget for Entire Agency
(Excel file)

AGENCY NAME: **CHILD CARE SERVICES ASSOCIATION**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 69,495	$ 50,000	$ 50,000	0%
Agency Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ -	$ -	$ 35,000	0
Town of Chapel Hill	$7,000	$9,000	$12,500	39%
Town of Carrboro	$4,000	$4,500	$7,500	67%
Other Local: Durham County	$ 29,783	$ 29,783	$ 29,783	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 128,648	$ 177,067	$ 177,067	0%
State Government	$ 11,269,541	$ 11,122,999	$ 11,122,999	0%
Federal Government	$ 11,268,202	$ 13,991,503	$ 11,327,387	-19%
Other Grants: Child Care Resources, Inc.	$ 459,407	$ 459,407	$ 459,407	0%
Other Grants: Southwestern Child Developme	$ 298,084	$ 298,084	$ 298,084	0%
Other Grants: Town of Cary	$ 1,500	$ 1,500	$ 1,500	0%
Miscellaneous/Other Revenue	$ 2,299,384	$ 1,971,328	$ 2,171,328	10%
Please list 3 largest Miscellanous sources:				
Kitchen $528,784.00				
Foundations $695,023.00				
University of North Carolina $498,638.00				
Total Agency Revenue	**$ 25,835,044**	**$ 28,115,171**	**$ 25,692,555**	**-9%**
AGENCY EXPENSES				
Compensation	$ 6,285,548	$ 6,774,728	$ 6,368,244	-6%
Rent & Utilities	$ 118,703	$ 121,459	$ 120,244	-1%
Supplies & Equipment	$ 434,929	$ 538,746	$ 506,421	-6%
Travel & Training	$ 216,237	$ 408,874	$ 380,253	-7%
Other Expenses:	$ 18,779,627	$ 20,271,364	$ 18,317,392	-10%
Please list 3 largest "Other Expenses":				
Wages Pass through $6,500,000				
TEACH Pass through $3,114,251				
Contracts with Service Provider $2,066,199				
Total Agency Expenses	**$ 25,835,044**	**$ 28,115,171**	**$ 25,692,555**	**-9%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ 0**	**0**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: **Child Care Services Association**

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
President	1		$ 110,000	$ 112,200	$ 112,200	2.22%	R, H
Vice Presidents	6	.1	$ 544,673	$ 555,566	$ 555,566	11.01%	R, H
Directors	6.5	.5	$ 427,460	$ 464,230	$ 464,230	9.20%	R, H
Senior Manager	3		$ 188,754	$ 192,530	$ 192,530	3.81%	R, H
Admin Managers	4		$ 217,394	$ 221,742	$ 221,742	4.39%	R, H
Program Managers	11.15	1.5	$ 561,625	$ 578,050	$ 578,050	11.45%	R, H
Coordinators, Specialists & Developers	32.83		$1,450,116	$1,441,752	$1,441,752	28.56%	R, H
Counselors, Supervisors, TA Associates, Accounting Associates, Resource Teachers, Administrative Assistants	39.04	3.3	$1,203,272	$1,374,947	$1,374,947	27.24%	R, H
Meal Service and Research Assistants	4.28		$ 137,235	$ 107,180	$ 107,180	2.12%	R, H

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: Club Nova Community, Inc.

Street Address: 103 D West Main Street, Carrboro, NC 27510

Mailing Address: 103 D West Main Street, Carrboro, NC 27510

Website Address: www.clubnova.org

Executive Director: Karen Kincaid Dunn

Telephone: 919-968-6682

E-Mail: kdunn@clubnova.org and karendunn@nc.rr.com

Contact Person: Karen Kincaid Dunn, Sadie Brooks, Steven Warnock

Telephone: 919-968-6682

E-Mail: sbrooks@clubnova.org swarnock@clubnova.org

Fax: 919-968-2522 Federal ID Number: 27-0103430

Funding Source Summary – Briefly state how any awarded funds would be used.	Current Funding (FY14-15)	Requested Funding (FY15-16)
Orange County Government	$75,000	$80,000
Summary of intended use of funds: Club Nova addresses unmet needs and fills many gaps in our community mental health system. Fulfilling our mission requires a healthy mix of government and private funds. Orange County funds will sustain Club Nova with its comprehensive, integrated approach and critical safety net for individuals living with serious mental illness. Specifically, the funding will allow us to continue to provide: Clubhouse Model programming to our members who also receive ACTT services, crisis prevention and intervention, employment opportunities, and transportation services.		
Town of Chapel Hill	$9,500	$12,000
Summary of intended use of funds: Club Nova offers a comprehensive, coordinated, integrated approach to meet the board array of needs of individuals living with serious mental illness. Funding from Chapel Hill helps us sustain the following facets of our Clubhouse Model that are aligned with the top priorities of the Town of Chapel Hill: • Supported Housing: Ensure our members secure and maintain affordable, safe, dignified housing. • Health Care: Coordinate and support members in accessing and navigating the health care system to meet what are often complex medical needs. • Food Security and Nutrition: Provide healthy, affordable meals that are prepared as community. • Employment Program: Provides job development, job coaching, and support in returning to paid work in the community. • Supported Education: Provide support and assistance to members returning to school. • Integration of opportunities, resources, and supports to meet broad array of needs Specifically, funds from the Town of Chapel Hill will be used toward general operating costs, including staffing, utilities, and supplies.		
Town of Carrboro	$10,000	$12,000
Summary of intended use of funds: Club Nova is clearly part of Carrboro and contributes to Carrboro's unique identity. Club Nova fills the many gaps in our community providing for the unmet human services needs of our members who live with serious mental illness. Many members have other serious health conditions. The majority of our members have extremely low income. Funds from the Town of Carrboro will help us continue to improve the health of our members by providing healthy, affordable meals that are planned, prepared, and shared by members and staff as a community.		

Karen Kincaid Dunn

Executive Director

January 23, 2015

Date

Gretchen Davis

President, Board of Directors

January 23, 2015

Date

Section I: Agency and Program Overview

ONE:

Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

a. Date of Incorporation:

Club Nova Community, Inc. (CNCI) incorporated on August 23, 2004.

b. Years in Operation:

Club Nova was founded July 1, 1987 through a grassroots effort of OPC Area Authority (our community mental health center) and community members. At the core of our inception was a group of individuals living with serious mental illness who became our founding members.

Club Nova has been in operation for 26 years and operated for 19 years under the auspices of OPC Area Authority.

As privatization of North Carolina mental health was unfolding, Club Nova, including members, staff, and many other stakeholders, made the decision to establish a 501c3 corporation and become a freestanding Clubhouse – a long time dream of ours. On May 21, 2006, Club Nova was divested and came under the governance of Club Nova Community, Incl. We have operated as a private non-profit for 8 ½ years.

c. Mission or Vision Statement (if applicable):

Mission Statement:

Club Nova provides opportunities for individuals with mental illness to lead meaningful lives of their choice in the community.

Vision Statement:

That Club Nova is a state of the art, financially sound organization, with sufficient staff engaging a multicultural, growing membership.

That Club Nova is an exemplary example of The Clubhouse Model.

That Club Nova affects change in how the community views, supports, accepts, and relates to individuals living with mental illness.

That the basic human and civil rights of people living with mental illness are fully respected and upheld.

Key Beliefs:

The Clubhouse Model is essential in any mental health care system.

The Club Nova Community offers opportunities, meaningful work and relationships where everyone is treated with dignity and respect.

Each member is recognized for his or her individual strengths, abilities, and unique gifts.

The basic human and civil rights of people are fully respected and upheld.

We sustain an accepting and loving environment.

Brief History of Agency:
Club Nova was established to meet the needs of persons living with severe and persistent mental illness in Orange County, including Carrboro, Chapel Hill, Hillsborough, Cedar Grove, Efland, Hurdle Mills, and Mebane.

Club Nova is a Clubhouse Model accredited by Clubhouse International. The Clubhouse Model is included in the Substance Abuse and Mental Health Services Administration (SAMHSA) registry for Evidence-Based Practices.

Club Nova is founded on the understanding that recovery from mental illness must involve the whole person in a vibrant and culturally sensitive community. Club Nova has demonstrated that people with mental illness can successfully live and work as active participants within the community. Club Nova's success is rooted in its environment of support, acceptance, and commitment to the potential contribution and success of each individual regardless of the severity of his or her illness. Club Nova is a place where people belong and contribute, in a manner that differs from traditional mental health model where they are viewed as patients who receive treatment.

The success of Club Nova is directly related to its resiliency, perseverance, and inclusive, shared leadership and decision making.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). IF MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

TWO:

Describe the identified community need(s) the Program(s) funded will address.

From the local, to state, to national, to global level, mental health and the human and economic costs of mental illness are rising to the forefront as a priority. The World Health Organization has developed a comprehensive action plan to address mental health.

People living with serious mental illness have the same needs as anyone else in society: respect, hope, mutuality, and unlimited opportunity to access friendship, housing, education, and employment. People living with mental illness often need substantial, coordinated supports and comprehensive services to meet their needs.

Mental illness often affects every facet of a person's life. One out of four people have mental illness, and people living with mental illness have a significantly shorter life expectancy (25 years shorter). Mental illness often results in multiple hospitalizations and ER visits. Nationally, hospitalization rates increased for adults with mental illness over the last decade. At Club Nova, we have maintained a low psychiatric hospitalization rate over the last few years. In 2014, 12.5% of our members reported a psychiatric hospitalization.

Individuals with mental illness experience crisis situations that require immediate assistance from providers they trust. Without necessary supports, people are at risk for homelessness and involvement with the criminal justice system. According to the National Coalition for the Homeless, 26% of the homeless population has a diagnosed mental illness. At Club Nova 100 % of our members maintained their housing in 2014 and did not experience homelessness.

Additionally, the onset of mental illness, often in early adulthood, interrupts educational endeavors and career opportunities. Nationally, the unemployment rate for individuals with severe and persistent mental illness averages 90% as reported by the Surgeon General. At Club Nova our members engage daily in a work-ordered day that helps build skills necessary to obtain employment, return to school, and volunteer in the community. At Club Nova 27% of our members maintained at least part-time employment in the last year.

The Clubhouse Model is one of the most comprehensive, integrated programs in the United States offering persons with mental illness access to the supports and opportunities needed to rebuild their lives. Club Nova offers support and opportunities to develop and sustain a healthy lifestyle, maintain safe and affordable housing, pursue education endeavors, secure employment, develop meaningful relationships, and become fully engaged in the community.

We fulfill an important, critical mission and require government assistance to accomplish our goals, especially as reductions or elimination of funding continue with state and Medicaid dollars.

We are inclusive and serve those who are uninsured or underinsured. Club Nova assures access to our program across the entire geographic area of Orange County, including towns and townships. We provide transportation to eliminate any barrier to participation.

Outside Agency Funding is critical to our ability to address the above needs and the following specific needs targeted by our Program Goals listed in Section II:

- Isolation and hospitalizations are decreased and access to service and community integration are increased by Program Goal 1.
- Sense of community, meaningful work, relationships and comprehensive care are needs addressed by Program Goal 2.
- Financial stability and independence are needs addressed by Program Goal 3.
- Continuity of care and sustaining the critical role that Club Nova serves in our community are addressed by Program Goal 4.
- Food insecurity and health are addressed by Program Goal 5.

THREE:

Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Programming

In April 2014, Club Nova achieved another three year accreditation as a Clubhouse Model. Our operational goals are to sustain the highest quality Clubhouse Model for our members.

Funding Summary

Fulfilling our critical mission requires a healthy mix of government and private funding

Financial Operational Challenges and Progress

Club Nova remains vigilant and resourceful in addressing extraordinary challenges operating within the context of changes within the North Carolina Mental Health System.

ITEM ONE

Reduction in Already Low Reimbursement Rate

Unanticipated service rate reductions were announced by Cardinal Innovations mid-December 2013 and implemented February 1, 2014. Cardinal reported that NC Department of Health and Human Services (NC-DHHS) requested their rates align with state established rates. As of February 1, 2014, our rate was reduced ~ 7 % (~$28,000 annually).

North Carolina already had one of the lowest reimbursement rates for Clubhouses of any other state in the nation. In a nationwide survey conducted by University of Massachusetts School of Medicine, representing 30 states, the average hourly reimbursement rate is $23.96 per hour. The hourly reimbursement rate in North Carolina is $10.76.

Temporary Solution for FY 2014-2015

Club Nova worked with Cardinal Innovations to allocate $28,000 (equivalent of 7% rate reduction) in Non UCR Funds to compensate for the rate reduction. These funds are not guaranteed for Fiscal Year 2015-2016.

ITEM TWO

NC DHHS Elimination of "Supported Employment" Service Definition and Funding

July 1, 2013, NC DHHS eliminated the mental health "Supported Employment" service definition that provided significant funding for Club Nova's Employment Program. The newly implemented employment definition is not a replacement funding source due to incompatibility with the Clubhouse Model.

While Outside Agency Funding from Orange County has helped supplement the cost of our Employment Program, currently this is the **only** funding ($10,000) we receive for this important work we do helping our members return to paid work. Only counting the cost of salary and benefits of one full-time staff, the annual cost is ~ $40,000. We continue to offer our full range of employment supports and opportunities. This year we are requesting an additional $5,000 to help offset the elimination of the state revenue funding stream.

ITEM THREE

ACTT Exclusion

Due to the ACTT Exclusion, Club Nova cannot bill for our members who receive ACTT. We provide ~ $125,000 for members who receive ACTT. The services are complementary with both services focusing on those with severe and persistent mental illness who are some of our most vulnerable community members.

Partial Solution

In recent years, we have been able to secure a total of ~$60,000 from all funding sources to offset this continued loss. This still leaves a loss of ~$65,000 that Club Nova absorbs.

Effects on Club Nova

If we do not continue to identify and receive new and/or additional sources of revenue, the effects on cash flow begin to emerge.

We have attracted and want to retain our high quality staff. Staff currently pay 30% of their health care premiums, and there have been no raises or cost of living allowances since 2009. We did offer a small bonus in December 2014.

Ongoing Efforts

Long-term solutions exist to the above financial challenges. Implementing necessary changes requires support of NC DHHS and effective state level policy change.

In December, the NC Clubhouse Coalition, along with NAMI-NC met with Deputy Secretary, Dave Richard. The meeting presented the opportunity to further our work with NC DHHS and other partners to institute state level change that makes the Clubhouse Model sustainable.

We are meeting again with Dave Richard in the next few weeks. Dave is bringing other leaders in DHHS to the table, as well as Managed Care Organizations, including Cardinal Innovations. We are requesting the following changes from NC DHHS:

- Set reasonable reimbursement rate that sustains the cost-effective evidence based Clubhouse Model
- Eliminate ACTT Exclusion
- Reinstate funding for supported employment provided through Clubhouse Model

Club Nova Physical Facility Renovation and Expansion

We are overdue for expansion to meet the needs of our current and future membership and the mental health needs of our community. We have made plans to renovate and expand our physical facility. Our architectural plan is complete, and our Conditional Use Permit has been approved by the Town of Carrboro.

FOUR:

Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

REVENUE SOURCES	AMOUNT	ONGOING / NEW
Medicaid and IPRS	~$396,000.00	Ongoing
Human Services Grant: Orange County	$80,000.00	Ongoing
Human Services Grant: Town of Chapel Hill	$12,000.00	Ongoing
Human Services Grant: Town of Carrboro	$12,000.00	Ongoing
Cardinal Innovations Non-UCR Allocation	$40,000.00	Ongoing
Cardinal Innovations Supplement for 7% Rate Reduction	$28,000.00	Ongoing
Private Donations	$50,000.00	Ongoing
Club Nova Thrift Shop	~$50,000.00	Ongoing
Club Nova Culinary Unit	~$10,000.00	Ongoing
Local Grants	$10,000.00	Ongoing
Miscellaneous Funds	$10,000.00	Ongoing
United Way of the Greater Triangle	$18,459.00	Ongoing

FIVE

Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

It takes a village that starts locally and spans to global . . .

Club Nova collaborates with service providers, community institutions, and advocacy groups to meet the needs of our members, educate the public, and advocate for change at the policy level.

Direct Services Partnerships

Club Nova provides a comprehensive, integrated approach to meet the broad array of needs of our members including: supports and coordination of health care, crisis prevention, access to healthy meals, assistance with housing and entitlements, and education, and employment opportunities. As an example, the partnerships held by our Culinary Program (see below) highlight the power of community partners: we are able to offer our members over 900 affordable, nutritious, and tasty plates each month through relationships with local food organizations.

Mental Health Care

- UNC Center for Excellence in Mental Health, Including ACTT, STEP, and Oasis
- UNC Department of Psychiatry and Walk In Clinic

- Lutheran Family Services – Assertive Community Treatment Team (ACTT)
- Referring Organizations and Agencies
- Private Psychiatrists
- Community Resource Court

Crisis Prevention and Intervention Work

- UNC Emergency Department
- Freedom House
- UNC On-Call Psychiatry
- Carrboro and Chapel Hill Police Departments – Wellness Checks are highly effective
- Chapel Hill Police Department Crisis Unit
- Lutheran Family Services, XDS, and Other ACT Teams - Intense Collaboration Especially During Crisis

Primary and Other Health Care

- Physicians (Primary Care Physicians, Specialists)
- El Futuro
- Piedmont Health Services
- UNC Family Medicine
- UNC Cancer Hospital
- Other Private Providers

Food Access and Health Living

- Farmer Foodshare Donations Station and POP Market
- Chapel Hill Farmers Market
- Carrboro Farmers Market
- Orange County Solid Waste
- Sysco and Ecolab

Housing

- CASA (Manages Club Nova Apartments)
- Interfaith Council
- Alberta Services – Homestead Place and Booth Road (Group Homes)
- Overlook Apartments
- Orange County Housing Authority
- Chapel Hill Public Housing
- Empowerment
- Oxford House
- Landlords

Securing Other Benefits and Entitlements

- Orange County Department of Social Services – Medicaid and SNAP
- Social Security Administration

Partnerships with Local Business Community

- Mental Health America of the Triangle

- Josh's Hope Foundation
- Café Driade
- Open Eye Cafe

Supported Education

- Durham Tech
- Central Carolina Community College
- University of North Carolina
- Job Link
- Orange County Literacy Council
- Community Empowerment Fund

Academic and Community Education Partnerships

We partner with students and community members to educate the public and future mental health providers about living with mental illness, the mental health system, the Clubhouse model and dismantling stigma.

We have an ongoing relationship with the University of North Carolina and are part of the academic curriculum for numerous departments, hosting many interns throughout the year at the Clubhouse. This relationship is beneficial to the students who gain relevant and meaningful experiences to facilitate their classroom learning as well as to our members who are provided opportunities to gain valuable skills as teachers and develop positive relationships. We also speak to civic and community organizations.

University of North Carolina

- Occupational Therapy
- School of Nursing
- Medical School
- Psychology
- Dental School
- Psychology
- School of Social Work
- School of Public Health
- School of Journalism
- Allied Health – Rehabilitation Counseling
- UNC Student Affairs

Community Education Partnerships / Collaborations

- Crisis Intervention Training – CIT
- Police Academy
- The Johnson Service Corps
- Churches
- Civic Groups
- Local Business Community – Over 50 Contacts for Job Development

Research

- University of Massachusetts School of Medicine
- University of North Carolina
- Veterans Administration (VA)
- Clubhouse International

Advocacy Partnerships

Club Nova works to raise awareness about the needs of individuals navigating the mental health system on a local and national policy level. By partnering with others we create a unified voice for change.

- North Carolina Clubhouse Coalition (NCCC)
- United States Clubhouse Coalition
- Clubhouse International
- Mental Health America of the Triangle
- Caramore Community, Inc.
- Josh's Hope Foundation
- Alberta Services
- Threshold
- NAMI-NC
- Annual Legislative Breakfast
- NC Council of Community Programs
- State Consumer Family Advisory Council (CFAC)

Local, State, and Federal Government

- Orange County, Town of Chapel Hill, and Town of Carrboro
- Managed Care Organizations (MCOs) – Cardinal and Sandhills
- Centers for Medicare and Medicaid (CMS)
- NC Department of Health and Human Services including Division of Mental Health and Division of Medical Assistance

SIX:

How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Our vision is to be a multicultural Clubhouse, supporting anyone who lives with a mental illness and chooses to become part of the Clubhouse. Although we do not do targeted outreach to specific minority and ethnic groups, it is evident by the broad array of partnerships / collaborations in the previous section, that Club Nova reaches a diverse group of individuals.

Club Nova members and staff give presentations on a regular basis to a broad range of groups, including faith based organizations, community groups, hospital staff, law enforcement representatives, educational institutions, and others.

The Club Nova Thrift Shop is one of the most effective ways for the program to reach out to our increasingly diverse community because our customers come from many different minority and ethnic groups. We have our brochure available in Spanish and encourage customers to take brochures.

SEVEN:

Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				X
Health and Nutrition				X
Job Training				X
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				X
Housing				X
Other				X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Program Goal 1: Club Nova will maintain a high-quality transportation program so our members have the opportunity to attend and engage in our programming and continue in the recovery process.	**Process Outcomes 1:** Club Nova offered a round trip ride for members throughout Orange County six days a week, and on holidays. Transportation was offered with no out-of-pocket charge to members. Club Nova's transportation service ensured each member had equal access to all of our opportunities. Club Nova transportation served members who live in areas not accessible to public transportation or are unable to utilize the bus system for various reasons (including symptoms related to diagnoses like paranoia) and needed viable transportation to Club Nova. Club Nova transportation staff received necessary training and certification. Staff maintains vehicles.	**Outcome Objective 1:** 100% of members had access to our transportation services and therefore had access to the rest of our services. 85% of Club Nova members utilized transportation opportunities. 100% of drivers were trained and certified in CPR, AED, 1st Aid, Blood Borne Pathogens, and Seizure Management. Transportation facilitated enhanced engagement by members in the larger community.	**Evaluation Method 1:** Club Nova: • Maintained a log in each vehicle to track ridership and mileage for each trip. • Tracked overall mileage and gas expenditures. • Kept documentation of certification of all trainings received by drivers (in CPR, AED, 1st Aid, Blood Borne Pathogens, etc.) • Retained log of social and community events attended by Club Nova members through Club Nova transportation

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Program Goal 2: Our current members who receive Assertive Community Treatment Team (ACTT) services will continue to receive full access to the supports and opportunities provided by Club Nova. Club Nova will promote and provide health and safety support for individuals with mental illness to lead meaningful and productive lives of their choice in the community.	**Process Outcomes 2:** Club Nova offered the spectrum of services to ACTT members regardless of our ability to receive payment for these services, due to ACTT/PSR exclusion, which amounted to $123,579 for FY 13/14. Club Nova actively collaborated with the ACTT providers to coordinate care and ensure the health and safety support of these members.	**Outcome Objective 2:** 100% of 21 Club Nova members who receive ACTT services maintained their Club Nova membership, and received supports and services provided through Club Nova.	**Evaluation Method 2:** Club Nova monitored our provision of services to ACTT members through calculating monthly participation and attendance hours. Club Nova staff wrote monthly service notes on each member receiving ACTT services.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Program Goal 3: Club Nova will continue to support and assist its members in the work ordered day who desire to return to paid *employment* in the community. Club Nova will assist members in obtaining the *education* or training they desire. Club Nova will match members with civic engagement and advocacy opportunities. The Transitional and Supported Employment programs will maintain and strive to increase the number of placements available to members and the number of members who work in the community.	**Process Outcome #3:** Club Nova built relationships with businesses throughout the county, resulting in structured Transitional Employment sites. We provided on-site training and support, absence coverage, job skill development, transportation to and from, and ongoing communication with the employers. Club Nova assisted with skill-building and educational opportunities, resume writing, benefit counseling and goal-planning. We held weekly employment support meetings with members working and seeking employment to go over goals, progress and skills.	**Outcome Objective #3:** 100% of Club Nova members had access to our Transitional and Supported Employment services, as well as, educational and/or job skills opportunities. 19 members returned to paid employment through these supports. These services led to the following outcomes: • Increased financial stability & independence • Increased self-esteem • Reduced community stigma • Increased member civic engagement	**Evaluation Method #3:** Club Nova: • Tracked member participation in employment programs • Maintained logs of members attending weekly Employment meetings • Kept logs of the number of Transitional & Supported Employment sites available through Club Nova

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Program Goal 4: Club Nova will continue to provide our members the full range of programming inherent in a Clubhouse Model by securing the funding necessary to support general operating costs. (This will include utilities, necessary supplies, employee salaries and benefits, and other costs We are requesting these funds from the Town of Chapel Hill.)	**Process Outcome #4:** Club Nova provided high-quality programming related to housing, employment, wellness and social engagement to members living in Orange County and the townships within. Club Nova maintained necessary staff to execute programming.	**Outcome Objective #4:** Club Nova was open 6 days a week, 55-60 hours per week, and obtained necessary assistance to pay the cost of utility bills, staff compensation and benefits (including payroll taxes and insurance), and necessary programming supplies and training.	**Evaluation Method #4:** Data on our general operating costs were maintained in our financial books. We tracked costs of utilities, payroll, and other daily supplies via receipts and Quickbooks to reflect the basic expenses of Clubhouse programming. We kept records of all paper invoices/receipts.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Program Goal #5: Club Nova will provide healthy, affordable meals to its membership in a setting that offers dining in a family, community atmosphere with opportunities for social engagement and a sense of belonging. Members develop self-worth as they prepare meals, providing nourishment for their colleagues, while at the same time building other skills. Club Nova maintains our Clubhouse Garden. Our garden supplements the ingredients for meals. Club Nova will help members in learning to prepare nutritious meals, learn cooking-related job skills, explore educational opportunities for members to develop their knowledge about diet, wellness, and nutrition. We are specifically requesting this funding from the Town of Carrboro.	**Process Outcome #5:** Club Nova offered round trip rides for members throughout Orange County six days a week, and on holidays. Transportation was offered with no out-of-pocket charge to members. Club Nova's transportation service ensures each member has equal access to all of our opportunities. Club Nova transportation served members living in areas not accessible to public transportation or are unable to utilize the bus system for various reasons (including symptoms related to diagnoses like paranoia) and needed viable transportation to Club Nova. Club Nova transportation staff received necessary training and certification. Staff maintained vehicles.	**Outcome Objective #5:** Club Nova provided over 40,000 miles of un-reimbursed transportation services to members. 100% of members had access to our transportation services and therefore had access to the rest of our services. 80% of Club Nova members utilized transportation opportunities. 100% of drivers attended all needed trainings. Transportation continued to facilitate enhanced engagement by members in the larger community.	**Evaluation Method #5:** Club Nova: • Maintained a log in each vehicle to track ridership and mileage for each trip. • Tracked overall mileage and gas expenditures • Kept documentation of certification will be kept of all trainings received by drivers (in CPR, AED, 1st Aid, Bloodborne Pathogens, etc.) • Maintain log of social and community events attended by Club Nova members through Club Nova transportation

If program(s) did not meet its stated goal(s), please explain:

B. FY 2015-16 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	*Counselor meets with students, as the first contact, for students referred for minor infractions.*	*Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)*	*School records were checked to verify that students had not been suspended.*
Program Goal #1: Club Nova will maintain a full transportation program that employs and trains 100% of a team of drivers, maintains its vehicles, and provides our membership with approximately 45,000 miles of transportation to and from Club Nova (plus socials and occasional medical appointments) throughout Orange County six days a week and on all major holidays.	**Process Outcome #1:** Club Nova offers a round trip ride for members throughout Orange County six days a week, and on holidays. Transportation is offered with no out-of-pocket charge to members. Club Nova's transportation service ensures each member has equal access to all of our opportunities. Club Nova transportation serves members who live in areas not accessible to public transportation or are unable to utilize the bus system for various reasons (including symptoms related to diagnoses like paranoia) and need viable transportation to Club Nova. Club Nova transportation staff receive necessary training and certification. Staff maintains vehicles.	**Outcome Objective #1:** Club Nova will provide approximately 45,000 miles of un-reimbursed transportation services to members. 100% of members will have access to our transportation services and therefore have access to the rest of our services. (0% will be unable to participate due to lack of transportation.) 80% of Club Nova members will utilize transportation opportunities. 100% of drivers will attend all needed trainings. Transportation will continue to facilitate enhanced engagement by members in the larger community.	**Evaluation Method #1:** Club Nova will: • Maintain a log in each vehicle to track ridership and mileage for each trip. • Maintain vehicle logs, tracking overall mileage and gas expenditures • Documentation of certification will be kept of all trainings received by drivers (in CPR, AED, 1st Aid, Blood Borne Pathogens, etc.) • Maintain log of social and community events attended by Club Nova members through Club Nova transportation

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Program Goal #2: Twenty current members who receive Assertive Community Treatment Team (ACTT) non-billable services (typically those members that experience the most disabling effects of mental illness) will continue to receive full access to the supports and opportunities provided by Club Nova.	**Process Outcome #2:** Club Nova continues to offer the spectrum of services to ACTT members regardless of our ability to receive payment for these services, due to ACTT/PSR exclusion, which amounts to roughly $125,000 annually. Club Nova actively collaborates with the ACTT providers to coordinate care and ensure the health and safety support of these members.	**Outcome Objective #2:** 100% of Club Nova members who receive ACTT services will maintain their Club Nova membership, and receive supports and services provided through Club Nova.	**Evaluation Method #2:** Club Nova will: • Monitor our provision of services to ACTT members through calculating monthly participation and attendance hours. • Write monthly service notes on each member receiving ACTT services.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Program Goal #3: Twenty-five Club Nova members will return to paid employment in the community through our Transitional and Supported Employment program.	**Process Outcome #3:** Club Nova builds relationships with businesses throughout the county, resulting in structured Transitional Employment sites. We provide on-site training and support, absence coverage, job skill development, transportation to and from, and ongoing communication with the employers. Club Nova will also assist with skill-building and educational opportunities, resume writing, benefit counseling and goal-planning. We hold a weekly employment support meeting with employment staff to go over goals, progress and skills.	**Outcome Objective #3:** 100% of Club Nova members will have access to our Transitional and Supported Employment services, as well as, educational and/or job skills opportunities. At least 25 members will return to paid employment through these supports. These services will lead to the following outcomes: • Increased financial stability & independence • Increased self-esteem • Reduced community stigma • Increased member civic engagement	**Evaluation Method #3:** Club Nova will: • Maintain logs of member participation in employment programs • Maintain logs of members attending weekly Employment meetings • Maintain logs of the number of Transitional & Supported Employment sites available through Club Nova

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Program Goal #4: Club Nova will operate six days a week, 55-60 hours per week and on all major holidays, to provide our members the full range of programming inherent in a Clubhouse Model. We will request these funds from the **Town of Chapel Hill.**	**Process Outcome #4:** Club Nova will provide high-quality programming related to housing, employment, wellness and social engagement to members living in Orange County and the townships within. Club Nova will maintain necessary staff to execute programming.	**Outcome Objective #4:** Club Nova will remain open 6 days a week, 55-60 hours per week, and will have the necessary assistance to pay the cost of utility bills, staff compensation and benefits (including payroll taxes and insurance), and necessary programming supplies and training.	**Evaluation Method #4:** Data on our general operating costs are maintained in our financial books. We will track costs of utilities, payroll, and other daily supplies via receipts and Quickbooks to reflect the basic expenses of Clubhouse programming. We will keep record of all paper invoices/receipts.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Program Goal #5: Club Nova will address food insecurity and diet related disease by providing at least **10,000 healthy, affordable meals,** engaging at least 80% of membership in Clubhouse meals, and providing education and training related to cooking, nutrition and growing food. We request this funding from the **Town of Carrboro.**	**Process Outcome #5:** Club Nova partners with local food organizations to secure approximately 200 pounds of fresh, local produce monthly. We cook from scratch and address individual dietary needs in our cooking. Club Nova members and staff will prepare and serve 13 meals per week. Members are given opportunity to engage every step of the process, including menu planning, grocery shopping, cooking and cleaning. Club Nova uses its garden as an educational and wellness activity and engages community experts for workshops and trainings related to wellness. Staff works closely with members who have individual goals specifically related to healthy eating and increased wellness to ensure they have the supports needed.	**Outcome Objective #5:** 100% of Club Nova members will have access to an average of 13 healthy, well-balanced meals each week (5 breakfasts, 6 lunches and 2 dinners), with 10,000 meals being served for the year. At least 80% of Club Nova members will participate in meals. This service will lead to: • Decrease in food insecurity for members • Increase in knowledge of culinary skills, nutrition, and gardening • Increase in knowledge in the health benefits related to a healthy diet • Decrease in incidence of nutrition-related diseases	**Evaluation Method #5:** • Club Nova will maintain records of the number of meals served daily. • Club Nova will maintain daily records of individuals eating at the Clubhouse. • Club Nova will survey its membership yearly to evaluate the achieved health and food security benefits of our healthy, affordable meal program and nutrition education. • Club Nova staff will closely monitor specific individuals' wellness goals through progress notes.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Club Nova Community, Inc.-Orange County Funding for Transportation

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 50,000	$ 50,000	$ 50,000	0%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	$ 50,000	$ 50,000	$ 50,000	0%
PROGRAM EXPENSES				
Compensation	$ 24,916	$ 25,000	$ 26,000	4%
Rent & Utilities				0
Supplies & Equipment	$ 41,262	$ 49,570	$ 50,000	1%
Travel & Training	$ 2,748	$ 2,000	$ 2,000	0%
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Program Expenses	$ 68,926	$ 76,570	$ 78,000	2%
SURPLUS/(DEFICIT) FOR PERIOD:	$ (18,926)	$ (26,570)	$ (28,000)	-5%

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Club Nova Community, Inc.-Orange County Funding-PSR Services-ACTT Members

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 15,000	$ 15,000	$ 15,000	0%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local: MCO County Allocation for ACTT	$ 40,000	$ 40,000	$ 45,000	13%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	$ 55,000	$ 55,000	$ 60,000	9%
PROGRAM EXPENSES				
Compensation				0
Rent & Utilities				0
Supplies & Equipment				0
Travel & Training				0
Other Expenses:	$ 116,828	$ 120,000	$ 125,000	4%
Please list 3 largest "Other Expenses":				
# Hours at PSR Reim Rate $ -				
$ -				
$ -				
Total Program Expenses	$ 116,828	$ 120,000	$ 125,000	4%
SURPLUS/(DEFICIT) FOR PERIOD:	$ (61,828)	$ (65,000)	$ (65,000)	0%

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Club Nova Community, Inc. - Orange County Funding for Employment

	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
PROGRAM REVENUE				
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 10,000	$ 10,000	$ 15,000	50%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	$ 10,000	$ 10,000	$ 15,000	50%
PROGRAM EXPENSES				
Compensation	$ 33,448	$ 33,010	$ 34,330	4%
Rent & Utilities				0
Supplies & Equipment				0
Travel & Training				0
Other Expenses:	$ 6,186	$ 6,443	$ 6,700	4%
Please list 3 largest "Other Expenses":				
Fringe $ -				
$ -				
$ -				
Total Program Expenses	$ 39,634	$ 39,453	$ 41,030	4%
SURPLUS/(DEFICIT) FOR PERIOD:	$ (29,634)	$ (29,453)	$ (26,030)	12%

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Club Nova Community, Inc. - Carrboro Funding for Health

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County				0
Town of Chapel Hill				0
Town of Carrboro	$ 10,000	$ 10,000	$ 12,000	20%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	$ 10,000	$ 10,000	$ 12,000	20%
PROGRAM EXPENSES				
Compensation	$ 33,473	$ 32,011	$ 33,292	4%
Rent & Utilities				0
Supplies & Equipment	$ 21,735	$ 21,000	$ 22,000	5%
Travel & Training				0
Other Expenses:	$ 12,930	$ 13,000	$ 13,000	0%
Please list 3 largest "Other Expenses":				
Culinary Unit Intern $ 12,240.00				
$ -				
$ -				
Total Program Expenses	$ 68,138	$ 66,011	$ 68,292	3%
SURPLUS/(DEFICIT) FOR PERIOD:	$ (58,138)	$ (56,011)	$ (56,292)	-1%

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Club Nova Community, Inc. - Chapel Hill Funding for Club Nova Community, Inc.

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County				0
Town of Chapel Hill	$ 9,000	$ 9,500	$ 12,000	26%
Town of Carrboro				0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	$ 9,000	$ 9,500	$ 12,000	26%
PROGRAM EXPENSES				
Compensation	$ 429,381	$ 439,600	$ 453,462	3%
Rent & Utilities	$ 28,912	$ 36,500	$ 36,500	0%
Supplies & Equipment	$ 36,179	$ 39,050	$ 39,050	0%
Travel & Training	$ 13,594	$ 14,000	$ 14,000	0%
Other Expenses:	$ 192,244	$ 159,017	$ 163,100	3%
Please list 3 largest "Other Expenses":				
See "Other Expenses" Tab $ -				
$ -				
$ -				
Total Program Expenses	$ 700,310	$ 688,167	$ 706,112	3%
SURPLUS/(DEFICIT) FOR PERIOD:	$ (691,310)	$ (678,667)	$ (694,112)	-2%

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service+: One Unit of Service Equals One Hour of Service

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	50,812 Hours of Service	100 %	$668,729	$13.16 Per Hour of Service
Estimated FY14-15	52,000 Hours of Service	100 %	$688,167	$12.85 Per Hour of Service
Projected FY15-16	54,000 Hours of Service	100 %	$688,167	$12.74 Per Hour of Service

2) Define one unit of service+: One Unit of Service Equals One Member

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost (Annual Cost / Budget)	Program Unit Cost++ = Total Program Cost Total Program Units that Met Goal
Actual FY13-14	Based on 100 Members	100 %	$668,729	$6,687.29 Annual Cost Per Member
Estimated FY14-15	Based on 100 Members	100 %	$688,167	$6,881.67 Annual Cost Per Member
Projected FY15-16	Based on 100 Members	100 %	$688,167	$6,881.67 Annual Cost Per Member

3) Define one unit of service+: One Unit of Service Equals One Member

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost (Annual Cost / Budget)	Program Unit Cost++ = Total Program Cost Total Program Units that Met Goal
Actual FY13-14	Based on 102 Members	100 %	$668,729	$6,556.17 Annual Cost Per Member
Estimated FY14-15	Based on 113 Members	100 %	$688,167	$6,089.97 Annual Cost Per Member
Projected FY15-16	Based on 131 Members	100 %	$688,167	$5,253.18 Annual Cost Per Member

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program

One unit of service is one hour of PSR services provided to Club Nova Community, Inc. members for table 1.

For Tables 2 and 3, one unit of service is equal to one member.

Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: PSR

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	68	74	83	Durham City	4	4	4
Female	34	39	48	Durham County	0	0	0
2. **Ethnicity**				Raleigh City	0	0	0
African-American	15	19	24	Wake County	0	0	0
Caucasian	81	86	92	Town of Chapel Hill	46	52	59
Hispanic	4	5	10	Town of Carrboro	43	48	55
Other	2	3	5	Orange County	8	8	12
3. **Age**				Other (specify)	1	1	1
0-5 Years	0	0	0				
6-18 Years	0	0	0	Per cent of clients at, or below, federal poverty level	96%	97%	97%
19-50 Years	54	54	61				
51+ Years	48	59	70		102	113	131
Unknown	0	0	0	***TOTAL # OF CLIENTS SERVED***			

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Club Nova Community, Inc.

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 62,907	$ 49,500	$ 50,000	1%
Agency Generated Revenue (fees)	$ 387,934	$ 380,000	$ 396,000	4%
Local Government Grants:				
Orange County	$ 75,000	$ 75,000	$ 80,000	7%
Town of Chapel Hill	$ 9,000	$ 9,500	$ 12,000	26%
Town of Carrboro	$ 10,000	$ 10,000	$ 12,000	20%
Other Local: MCO Non-UCR Allocation For ACTT	$ 40,000	$ 40,000	$ 40,000	0%
Other Local: MCO Supplement for Rate Reduction		$ 28,000	$ 28,000	0%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 18,459	$ 18,459	$ 18,459	0%
State Government				0
Federal Government				0
Other Grants: Misc Local Grants	$ 9,153	$ 10,041	$ 10,000	0%
Other Grants:				0
Miscellaneous/Other Revenue	$ 74,473	$ 67,800	$ 70,000	3%
Please list 3 largest Miscellanous sources:				
Thrift Shop Sales $ 49,613.00		$ 50,000	$ 50,000	
Culinary Meals $ 7,993.00		$ 9,500	$ 10,000	
Other Miscellaneous $ 16,867.00		$ 8,300	$ 10,000	
Total Agency Revenue	**$ 686,926**	**$ 688,300**	**$ 716,459**	**4%**
AGENCY EXPENSES				
Compensation	$ 429,381	$ 439,600	$ 453,462	3%
Rent & Utilities	$ 28,912	$ 36,500	$ 36,500	0%
Supplies & Equipment	$ 36,179	$ 39,050	$ 39,050	0%
Travel & Training	$ 13,594	$ 14,000	$ 14,000	0%
Other Expenses:	$ 192,244	$ 159,017	$ 163,100	3%
Please list 3 largest "Other Expenses":				
See "Other Expenses" Tab $ -				
$ -				
$ -				
Total Agency Expenses	**$ 700,310**	**$ 688,167**	**$ 706,112**	**3%**
SURPLUS/(DEFICIT) FOR PERIOD:	$ (13,384)	$ 133	$ 10,347	7680%

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Club Nova Community, Inc.

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1.00	+	$44,616	$44,616	$46,401	6.5	(R) (H)
Associate Director	1.00	+	$42,652	$36,504	$37,964	6.2	(R) (H)
7 Program Staff - Full Time	1.00	+	$171,152	$216,509	$225,679		(R) (H)
Program Staff – Part Time	0.50	+	$7,203	$12,480	$12,979		N/A
4 Transportation Drivers	0.25		$23,433	$23,433	$24,370		N/A
Program Staff No Longer Employed at CNCI - NM	1.00	+	$28,101	N/A	N/A		(R) (H)
Program Staff No Longer Employed at CNCI - TB	1.00	+	$2,808	N/A	N/A		(R) (H)
Bookkeeper (Wages paid out of Accounting Expense)			$9,458	N/A	N/A		N/A
Culinary Temp Worker	0.50		$438	$2,388	$2,400		N/A
Thrift Shop Temp Worker	0.50		$1,947	N/A	N/A		N/A
Johnson Service Corp. Intern (Wages paid to Johnson Service Corp and is paid out of Intern Expense)			$12,930	$13,000	$13,000		N/A
6 Volunteers			N/A	N/A	N/A		N/A

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Communities In Schools of Orange County**

Street Address: 210 N. Columbia Street, Chapel Hill, N.C. 27514

Mailing Address: P.O. Box 9454 Chapel Hill, N.C. 27514

Website Address: www.cisorange.org

Executive Director: Sarah Shapard

Telephone: 919-967-6677 E-Mail: sarah@cisorange.org

Contact Person: Sarah Shapard

Telephone: 919-967-6677 E-Mail: sarah@cisorange.org

Fax: 919-967-6677 Federal ID Number: 58-2087264

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$102,000	$107,000
Summary of intended use of funds: CIS Orange serves Orange County by providing a evidence-based, school-based comprehensive program (new this year) at a CHCCS middle school, where 40% of the students are on free or reduced lunch. The school-based comprehensive site is open to all students with significant needs, who would benefit from additional Level 1 and Level 2 services. CIS also serves Orange County by providing afterschool programs at four middle schools in the district of Chapel Hill-Carrboro City Schools (CHCCS). The number of kids		

being served during the 2014-15 school year is 385 students for two districts. Because of a waiting list, we estimate we will serve the same number of students in CHCCS depending on availability of funding. The afterschool program is open to all students and focuses on homework help, tutoring and enrichment activities such as STE+aM (science, technology, engineering, arts and math). The "science" component includes health, physical activities and nutrition. These programs offer a supervised environment, healthy snacks, and transportation home.		
Town of Chapel Hill	$25500	$33000
Summary of intended use of funds: CIS Orange serves the Town of Chapel Hill by providing a school-based comprehensive program to a CHCCS middle school and an afterschool program at McDougle, Phillips, Smith and Culbreth.		
Town of Carrboro	$7000	$11000
Summary of intended use of funds: CIS Orange serves the Town of Carrboro by providing an afterschool program at McDougle Middle School.		
*the request for an increase in the amounts will enable CIS Orange to make up part of the difference from a planned cut of $80,000 or 20% of the annual award of $400,000 from a four-year federal grant (see budget for 21st Century) for the 2015-16 school year.		

_____ _____

Executive Director Board Chair

_____ _____

Date Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. **Date of Incorporation:** 1993
   b. **Years in Operation:** 22 years
   c. **Mission or Vision Statement (if applicable):** CIS Orange has a mission to surround students with a community of support, empowering them to stay in school and achieve in life. CIS Orange believes every child needs and deserves a one-on-one relationship with a caring adult, a safe place to learn and grow, a healthy start and a health future, a marketable skill to use upon graduation, and a chance to give back to peers and community.
   d. **Brief History of Agency:** Communities In Schools of Orange County (CIS Orange) is an affiliate of CIS National. Incorporated in 1993 to address community concerns regarding limited supervised services for pre-teens and teens in Orange County, CIS Orange began afterschool programs at three sites. It has grown to provide multiple program services at seven middle schools and one high school in Orange County.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. **Describe the identified community need(s) the Program(s) funded will address.**
   CIS Orange strives to ensure that all students have the opportunity to stay in school and achieve in life. The need to help students at risk of dropping out is still critical in the district for Chapel Hill-Carrboro City Schools (CHCCS). The district experienced a 1.8% drop from 92.6% in 2012 to 90.8 % in 2013,[1] and

   CIS Orange serves Orange County by providing an evidence-based school-based comprehensive program (Program 1) at a CHCCS middle school and an afterschool program (Program 2) at four CHCCS middle schools. These programs target students who may become disengaged from learning due to socio-economic status, limited English proficiency, documented truancy issues, potential health concerns and minority students. By engaging these students in the school-based comprehensive program, they will receive Level 1 and Level 2 services (Program 1) throughout

[1] www.ncpublicschools.org

the day with the support of a CIS student support specialist in coordination with the school social worker and school counselor. Level 1 services are open to all students and Level 2 services are offered one-on-one with students, who are at risk of dropping out of school. These services include, to name a few, mentoring, tutoring, food bank, school supply drives, counseling, clothing closet, job shadowing, college visits and health services. The unique model is the basis of the success the students are experiencing. Based on data -- consistently collected from an extensive network of CIS affiliates across the country -- 99% of the potential dropouts remained in school and 84% of the students met their academic performances.

The afterschool program (Program 2) is designed to create a safe space for middle school students between the hours of 3:30 – 5:30 five days a week. CIS Orange decreases the number of students left unsupervised during these critical hours after school. Each student receives a supervised environment, a healthy snack, and transportation home. The students also benefit from enrichment activities in key areas, such as STE+aM (science, technology, engineering arts, and math). Additionally the students --- the ones who need the most help -- receive intense academic support. This support includes homework help from the CIS educators and tutoring from the math and language arts teachers. By using proven best practices, CIS Orange aspires to improve their critical thinking skills and classroom behaviors. Students scoring a 1 or 2 on their EOG tests are referred by their teachers or social workers to enroll in both the school-based comprehensive program, which includes a slot in a CIS afterschool program to take advantage of the services provided during the day and afterschool.

3. **Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.**

There are four key changes that could have an impact on the existing afterschool programs to be funded for FY 2015-16, as follows:

Status on Orange County Schools
First, the district of Orange County Schools recently announced it will end CIS involvement at these schools --- Gravelly, Stanback, Stanford and Partnership Academy --- at the end of the 2014-15 school year. This was a decision made by OCS and the Orange County Board of Education even though there are funds including a 21st Century grant available through June 2017.

CIS Orange is in the second year of the 21st Century grant and will start its third year on the grant during the 2015-16 school year with a 20% reduction of the annual award. The awards are as scheduled, as follows: Year 1 ($400,000); Year 2 (400,000); Year 3 ($320,000) and Year 4 ($240,000).

Of the 385 students CIS Orange is currently serving, 133 students are enrolled in the middle schools and an alternative high school for Orange County Schools and 252 students are enrolled in the middle schools for Chapel Hill-Carrboro City Schools.

Even with OCS pulling out, CIS Orange could serve up to the same number of students (385) in CHCCS because of a waiting list. The number of students serve will depend, however, on the amount and availability of funds from a variety of funding sources including, to name a few, the N.C. Department of Public Instruction, CHCCS, Orange County Board of Commissioners, Town of Chapel Hill, Town of Carrboro and funds raised through several special events and from individuals in the community.

Expansion and Status of Accreditation Review for CIS Orange

Second, the situation with Orange County Schools should not have an impact on the accreditation process, which is expected to be completed by June 1, 2015. The accreditation is based on one school-based comprehensive site, Partnership Academy. Although it is part of Orange County Schools, CIS is still serving students there until the end of the school year. The plan is to expedite the process sooner rather than the June 1 date set by CIS National.

Moreover, because of OCS pulling out, CIS National is considering a proposal for provisional accreditation to CIS Orange. This provision will enable CIS Orange to develop a comprehensive site at a CHCCS middle school where 40% of the student are on free or reduced lunch. There are two middle schools interested in receiving comprehensive services for their students with significant needs during the 2015-16 school year. The plan is to develop one comprehensive site unless additional funding is secured to develop a second site.

Status on Continuation of Funding

Even with OCS pulling out, CIS Orange anticipates it could serve up to the same number of students now serving during the 2014-15 school year for the 2015-16 school year. With that, CIS Orange will continue to depend on the funds from North Carolina Department of Public Instruction (21st Century grant), Orange County, Town of Chapel Hill, Town of Carrboro and CHCCS for the 2015-16 school year.

Status on Leadership and Additional Resources

The Board of Directors recently announced that Sarah Shapard will serve as permanent executive director effective as of April 1, 2015. She was interim executive director and finance officer since March 2014. With the new leadership in place on the board and at the organization, there are several key long-term strategies that are being implemented to help ensure the expansion to a school-based comprehensive site and the sustainability of the CIS afterschool programs (see #2, page 11)

4. **Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.**

CIS Orange anticipates it will receive the grants during the 2015-16 fiscal year as follows:

1. **$320,000** (ongoing, North Carolina Department of Public Instruction).
2. **$107,000** (ongoing & new, Orange County Board of Commissioners)
3. **$33,000** (ongoing & new, Town of Chapel Hill)
4. **$12500** (new, CIS-North Carolina)
5. **$11000** (ongoing & new, Town of Carrboro)
6. **$46,551** (ongoing, Chapel Hill-Carrboro City Schools)
7. **$4000** (ongoing, CIS Golf Classic)
8. **$3000** (ongoing, individuals, foundations and businesses)

5. **Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)**

CIS Orange couldn't provide its services without the in-kind contributions and support of its supporters and community partners for its school-based and afterschool programming. They are as follows:

- Chapel Hill-Carrboro City Schools (assistant superintendents, chair of CHCCS board of education, monetary and in-kind contributions)
- CHCCS Transportation (CIS pays CHCCS to provide transportation home after the afterschool program and occasional field trip)
- CHCCS Nutrition (Chartwells) (CIS pays for snacks daily to all CIS students)
- CHCCS Blue Ribbon Mentoring Advocates (provides tutoring support to all CIS students in CHCCS district)

- CHCCS ESL and Translation Services (Provide translation of parent/guardian communications and translates for phone calls with CIS English-as-Second-Language families
- UNC-Chapel Hill School of Social Work (estimated in-kind contribution of $15,000 for evaluation services)
- CIS North Carolina (estimated in-kind contribution of $3000 for public relations/accreditation services)

CIS Orange is in the process of creating or has created partnerships with the following to provide school-based and afterschool services, as follows:

- New: UNC Art & Life (weekly art history lessons)
- New: TABLE
- New: UNC School of Social Work
- New: UNC School of Medicine
- Duke University Y.O.G.A. for Youth (weekly yoga lessons)
- New: Neill's Family Tae Kwon Do
- New: UNC Black Student Movement (service and outreach)
- Blue Ribbon Mentor Advocates
- New: Chapel Hill, Carrboro, Hillsborough, Efland Fire Departments
- New: 4H Nutrition Education

6. **How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?**
CIS Orange serves all middle school students, who need additional services during the school day and after school during the hours of 3:30 – 5:30. The majority of the students enrolled in CIS programming are members of various ethnic and minority groups. Continuous collaboration with district and school administration ensures that these students receive needed services. CIS Orange also creates opportunities to recognize minority accomplishments, such as a week of lessons on MLK, Jr. and is partnering with a variety of ethnic and minority groups such as My Brother's Keeper to mentor these students. In addition to MBK, the other groups include UNC Black Student Movement and Blue Ribbon Mentor Advocates. All students, regardless of race and/or social-economic status, are eligible to receive these services.

7. **Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).**

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X			
Health and Nutrition	X[2]			
Job Training	X[3]			
Sports and Arts Activities	X			
Pre-School Activities				
After-School Activities	X			
Mentoring	X[4]			
Transportation	X			
Housing				

[2] CIS Orange believes every student needs and deserves opportunities to take care of themselves. Snacks are provided each day. Education throughout the program encourage awareness of healthier food choices. There are ample opportunities to exercise indoors, in the gym, or outside, on the tracks.

[3] CIS Orange believes every child needs and deserves opportunities to develop a marketable skill to use upon graduation. Creating success in education basics such as reading and math, CIS Orange promotes college and career readiness. For instance, we have a CIS Fellow working with the high school students at Partnership Academy to develop their own online portfolio they can use to share with prospective college recruiters or employers.

[3] CIS Orange believes every child needs and deserves opportunities to develop one-on-one relationships with a caring adult. Students are in small groups with a maximum ration of 1 teacher to 20 students; this allows teachers and students to become comfortable with one another and build positive and strong relationships.

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

CIS Afterschool Programs (Program 1)

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
60% of participants will increase their 4th quarter report card grades in mathematics compared to their 1st quarter report card grades in mathematics.	Participants will attend a minimum of 64 hours of mathematics-related programming that includes tutoring	Participants will increase their 4th quarter report card grades in mathematics compared to their 1st quarter report card grades in mathematics.	Participants' report card grades will be recorded quarterly.
60% of participants will increase their 4th quarter report card grades (on a 5-point scale) in English language arts compared to their 1st quarter report card grades in English language arts.	Participants will attend a minimum of 64 hours of English language arts-related programming that includes tutoring.	Participants will increase their 4th quarter report card grades (on a 5-point scale) in English language arts compared to their 1st quarter report card grades in English language arts.	Participants' report card grades will be recorded quarterly.

70% of participants will demonstrate increased levels of homework completion in comparison to 1st quarter baseline levels.	All participants will implement a homework log. Teachers will report increased submission of completed homework. Quarterly improvement in student language arts grades.	Participants will demonstrate increased levels of homework completion in comparison to 1st quarter baseline levels	Evidence of consistent use of a homework log. Evidence of teacher-reported increases in submission of completed homework.
70% of program participants will demonstrate increased levels of 4th quarter classroom participation in comparison to 1st quarter baseline levels.	Increases in students' confidence in participation in 21st CCLC program and in school classes. Teachers consistently report active classroom involvement of participants.	Participants will demonstrate increased levels of 4th quarter classroom participation in comparison to 1st quarter baseline levels	Evidence of increased frequency in teacher-reported classroom participation. Evidence of student-reported confidence in class participation.
100% of participants will be exposed to enrichment activities in science, social studies, and creative arts.	Participants will be exposed to enrichment activities throughout the year.	Participants will be exposed to enrichment activities in science, social studies, and creative arts.	Curriculum documents outlines each sites schedule will show student participation in enrichment activities.

CIS School-Based Comprehensive Program (Program 2)

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
100% of participants will have access to a CIS student support specialist, who will also serve as a mentor	Program runs throughout the school day Monday – Friday for 32 weeks. CIS student support specialist partners with the school social worker and school couneslor to develop a site plan and facilitate individual plans for the students.	100% of participants will have a mentor during the school day and during the critical hours of 3-6pm.	At least 75% of the student population will be saturated with Level 2 services. At least 10 % of the student population will receive Level 1 services. Data collected and resulted entered into CIS Data Management System.

100% of participants will be exposed to age-appropriate Level 1 and Level 2 services and STE+aM enrichment activities.	Students are encouraged to participate in the services during the day and in enrichment activities after school with local organizations such as 4H.	100% of participants will be exposed to age-appropriate Level 1 and Level 2 services and enrichment activities.	Program Director/Student Support Specialist to keep an up-to-date schedule of services and activities.
60% of participants will receive higher report card and EOG scores.	Students receive homework support daily.	60% of participants will receive higher report card and EOG scores.	Program Director/Student Support Specialist keep attendance and data records that monitor student demographics, enrollment, grades and instances of suspensions.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

CIS Afterschool Programs (Program 1)

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
60% of participants will increase their 4th quarter report card grades in mathematics compared to their 1st quarter report card grades in mathematics.	Participants will attend a minimum of 64 hours of mathematics-related programming that includes tutoring	Participants will increase their 4th quarter report card grades in mathematics compared to their 1st quarter report card grades in mathematics.	Participants' report card grades will be recorded quarterly.
60% of participants will increase their 4th quarter report card grades (on a 5-point scale) in English language arts compared to their 1st quarter report card grades in English language arts.	Participants will attend a minimum of 64 hours of English language arts-related programming that includes tutoring.	Participants will increase their 4th quarter report card grades (on a 5-point scale) in English language arts compared to their 1st quarter report card grades in English language arts.	Participants' report card grades will be recorded quarterly.
70% of participants will demonstrate increased levels of homework completion in comparison to 1st quarter baseline levels.	All participants will implement a homework log. Teachers will report increased submission of completed homework. Quarterly improvement in student language arts grades.	Participants will demonstrate increased levels of homework completion in comparison to 1st quarter baseline levels	Evidence of consistent use of a homework log. Evidence of teacher-reported increases in submission of completed homework.

70% of program participants will demonstrate increased levels of 4th quarter classroom participation in comparison to 1st quarter baseline levels.	Increases in students' confidence in participation in 21st CCLC program and in school classes. Teachers consistently report active classroom involvement of participants.	Participants will demonstrate increased levels of 4th quarter classroom participation in comparison to 1st quarter baseline levels	Evidence of increased frequency in teacher-reported classroom participation. Evidence of student-reported confidence in class participation.
100% of participants will be exposed to enrichment activities in science, social studies, and creative arts.	Participants will be exposed to enrichment activities throughout the year.	Participants will be exposed to enrichment activities in science, social studies, and creative arts.	Curriculum documents outlines each sites schedule will show student participation in enrichment activities.

CIS School-Based Comprehensive Program

Stated Program Goals	Program Activities	Actual Results for FY 14-15	Evaluation Method
100% of participants will have access to a CIS student support specialist, who will also serve as a mentor	Program runs throughout the school day Monday – Friday for 32 weeks. CIS student support specialist partners with the school social worker and school couneslor to facilitate individual plans for the students.	100% of participants will have a mentor during the school day and during the critical hours of 3-6pm.	Data collected and resulted entered into CIS Data Management System.
100% of participants will be exposed to age-appropriate Level 1 and Level 2 services and STE+aM enrichment activities.	Students are encouraged to participate in the services during the day and in enrichment activities after school with local organizations such as 4H.	100% of participants will be exposed to age-appropriate Level 1 and Level 2 services and enrichment activities.	Program Director to keep an up-to-date schedule of services and activities.
60% of participants will receive higher report card and EOG scores.	Students receive homework support daily.	60% of participants will receive higher report card and EOG scores.	Program Director keep attendance and data records that monitor student demographics, enrollment,

			grades and instances of suspensions.

Section III. Program Budget
(Excel file)

Agencies must still send a copy of the MS Excel file with their electronic application, even if they choose to embed the MS Excel table, on this page. The MS Excel file can be found here.

1. Please complete a Program Budget Excel Form **for each requested program.** The Program Budget should reflect only figures and amounts associated with the Program(s) for which you are seeking funding and not the total agency budget.

   - CIS Afterschool Program Budget
   - CIS School-Based Comprehensive Program Budget

2. **If the program's finances experienced significant changes that you would like to explain, please use the space below.**

Section III. Program Information
Program Budget Worksheet
21st Century Grant

AGENCY NAME: **Communities In Schools of Orange County (21st Century Grant)**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County				0
Town of Chapel Hill				0
Town of Carrboro				0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government	$ 630,534	$ 400,000	$ 320,000	-20%
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 630,534**	**$ 400,000**	**$ 320,000**	**-20%**
PROGRAM EXPENSES				
Compensation	$ 420,089	$ 253,500	$ 199,000	-21%
Rent & Utilities	$ 5,155	$ -	$ 18,000	0
Supplies & Equipment	$ 7,431	$ 8,500	$ 9,000	6%
Transportion, Travel & Training	$ 52,921	$ 55,000	$ 24,000	-56%
Other Expenses:	$ 125,227	$ 83,000	$ 70,000	-16%
Please list 3 largest "Other Expenses":				
Contracted Services, Summer Program $ 47,000.00				
Snacks $ 18,000.00				
2015-16 Audit $ 5,000.00				
Total Program Expenses	**$ 610,824**	**$ 400,000**	**$ 320,000**	**-20%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 19,710**	**$ -**	**$ -**	**0**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Communities In Schools of Orange County (Local Muncipalities)**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 102,000	$ 102,000	$ 107,000	5%
Town of Chapel Hill	$ 29,000	$ 25,000	$ 33,000	32%
Town of Carrboro	$ 7,000	$ 7,000	$ 11,000	57%
Other Local: Hillsborough	$ 750	$ 750	$ -	-100%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 138,750**	**$ 134,750**	**$ 151,000**	**12%**
PROGRAM EXPENSES				
Compensation	$ 188,076	$ 96,678	$ 135,000	40%
Rent & Utilities	$ 4,002			0
Supplies & Equipment	$ 9,650		$ -	0
Travel & Training	$ -	$ -	$ -	0
Other Expenses:	$ 41,000	$ 38,072	$ 16,000	-58%
Please list 3 largest "Other Expenses":				
2015-16 Audit $ 8,000.00				
Accountant & Payroll Services $ 8,000.00				
Total Program Expenses	**$ 152,928**	**$ 134,750**	**$ 151,000**	**12%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost / Total Program Units that Met Goal
Actual FY13-14	225	225	$400,000	$1778
Estimated FY14-15	385	428	$400,000	$934.57
Projected FY15-16	310-385	310-385	$320,000[5]	$1032.35 - $934.57

1) **Define one unit of service**[+]: CIS Orange provides afterschool programs to help at-risk students stay in school and achieve in life at the cost of $1032 per student (total cost is $320,000 with 310 students participating).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	129	206	155	Durham City		27	10
Female	96	222	155	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	63	136	90	Wake County			
Caucasian	73	122	90	Town of Chapel Hill	137	196	180
Hispanic	44	93	85	Town of Carrboro	20	45	120
Other	45	77	45	Orange County	225	428	310
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years	225	428	310	Per cent of clients at, or below, federal poverty level	45%	45%	45%
19-50 Years							
51+ Years							
Unknown				***TOTAL # OF CLIENTS SERVED***			310-385

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Communities In Schools of Orange County (to serve 385 students)**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 2,465	$ 3,000	$ 3,000	0%
Agency Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 102,000	$ 102,000	$ 107,000	5%
Town of Chapel Hill	$ 20,195	$ 25,000	$ 33,000	32%
Town of Carrboro	$ 7,000	$ 7,000	$ 11,000	57%
Other Local: Hillsborough	$ 750	$ 750	$ -	-100%
Other Local:	$ -			0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government	$ 630,540	$ 400,000	$ 320,000	-20%
Other Grants:	$ 11,599	$ 23,000	$ -	-100%
Other Grants: Chapel Hill-Carrboro City Schoo	$ 46,551	$ 46,551	$ 46,551	0%
Miscellaneous/Other Revenue	$ 4,191	$ 10,000	$ 3,000	-70%
Please list 3 largest Miscellanous sources:				
CIS Golf Classic $ 3,000.00				
$ -				
Total Agency Revenue	**$ 825,291**	**$ 617,301**	**$ 523,551**	**-15%**
AGENCY EXPENSES				
Compensation	$ 482,454	$ 413,028	$ 366,451	-11%
Rent & Utilities	$ 23,456	$ 24,000	$ 24,000	0%
Supplies & Equipment	$ 36,076	$ 25,000	$ 30,000	20%
Transportation & Travel & Training	$ 42,786	$ 43,000	$ 40,000	-7%
Other Expenses:	$ 249,768	$ 113,271	$ 63,100	0%
Please list 3 largest "Other Expenses":				
Contracted Services, Audit $ 34,000.00				
Snacks $ 25,600.00				
Insurance $ 6,500.00				
Total Agency Expenses	**$ 834,540**	**$ 618,299**	**$ 523,551**	**-15%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (9,249)**	**$ (998)**	**$ -**	**100%**

Section VI.

Comparative Budget for Entire Agency
(Excel file)

Agencies must still send a copy of the MS Excel file with their electronic application, even if they choose to embed the Excel table, on this page. The MS Excel file can be found here.

1. Please complete a Comparative Budget Excel Form **for the entire agency.** This budget form is required, even if the figures match the Program Budget Form(s).

2. If the agency's finances experienced significant changes that you would like to explain, please use the space below. Please see page 11, for an explanation to the significant changes to the organizations and finances.

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Communities In Schools of Orange County (CIS Orange)

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Ideal 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director (1)	1	1	$70,000	$61,200	$61,200		Not applicable
Program Director & Educator (1)	1	1	$79,783	$42,500 (1)	$42,500 (1)		Not applicable
Program Officer & Student Support Specialist (1)	.5	1	$25,187.50	$32,460 (.5)	$42,500 (.5)		Not applicable
CIS School-Based and Afterschool Personnel	.25	24	$272,236.00	$224,000	$169,251		Not applicable
CIS STE+aM Personnel (science, technology, engineering, arts and math)	.25	3	-	$14,000.00	$21,000		Not applicable
CIS Summer Personnel	1	10	-	$60,000.00	$30,000		Not applicable

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Community Empowerment Fund**

Street Address: 133 ½ E. Franklin Street, Suite 105, Chapel Hill, NC 27514

Mailing Address: 133 ½ E. Franklin Street, Suite 105, Chapel Hill, NC 27514

Website Address: www.communityempowermentfund.org

Executive Director: Maggie West

Telephone: (919) 270-5730 E-Mail: maggiew@communityef.org

Contact Person: Maggie West

Telephone: (919) 270-5730 E-Mail: maggiew@communityef.org

Fax: (919) 728-0233 Federal ID Number: 27-0428981

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$5,000	$7,500
Summary of intended use of funds: The Community Empowerment Fund (CEF) is requesting $7,500 from the Orange County Government to provide relationship-based support to individuals experiencing or at-risk of experiencing homelessness. We propose to assist participants in gaining employment, housing, and personal savings.		
Town of Chapel Hill	$2,500.00	$5,000
Summary of intended use of funds: Summary of intended use of funds: CEF is requesting $5,000 from the Town of Chapel Hill to provide relationship-based support to individuals experiencing or at-risk of experiencing homelessness. We propose to assist participants in gaining employment, housing, and personal savings.		
Town of Carrboro	$2,000.00	$2,500
Summary of intended use of funds: CEF is requesting $2,500 from the Town of Carrboro to provide relationship-based support to individuals experiencing or at-risk of experiencing homelessness. We propose to assist participants in gaining employment, housing, and personal savings.		

_____ _____

Executive Director Board Chair

_____ _____

Date Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:

CEF incorporated on October 28, 2010.

   b. Years in Operation:

Founded in 2009, CEF has served the Orange County community for over five years.

   c. Mission or Vision Statement (if applicable):

The Community Empowerment Fund cultivates opportunities, assets, and communities that support the alleviation of homelessness and poverty. CEF provides goal-oriented savings accounts, workforce development, financial education, and relationship-based support to homeless and near-homeless individuals. CEF is a student-powered nonprofit that pairs two volunteers with each of our members to provide personalized, one-on-one assistance. Through our programs, CEF assists members in gaining employment, stable housing, and financial security.

   d. Brief History of Agency:

CEF started as a student-run organization at UNC as a project of the Campus Y committee HOPE (Homeless Outreach Poverty Eradication). CEF was founded on the idea that small amounts of capital combined with social support, savings opportunities, financial education, and positive community could facilitate transitions out of homelessness.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Individuals experiencing or at-risk of experiencing homelessness in Orange County need gateways, connections, and resources to achieve self-reliance, including greater employment opportunities and affordable housing options. Households recovering from an episode of homelessness often need financial and life skills coaching to help manage household finances, resolve conflicts, access mental health resources, and improve physical health. With 17.8% of residents in Orange County living below the federal poverty level (according to US census data from 2009-2013), too many families in our community are living paycheck to paycheck and thus lack the ability to develop personal savings – whether to smooth volatile income streams or to make investments for the future. Without savings or emergency funds, these families are living on the brink of homelessness.

CEF is a key player in alleviating the challenges of homelessness and poverty in Orange County, and our Advocate Program fills a unique need in our community in several ways:

1. Our client-centered, relationship-based approach – dependent on our army of volunteers - is highly effective in engaging people with high barriers to employment, permanent housing and self-sufficiency.
2. We take a holistic approach to helping our members by carefully and broadly assessing their situations and needs, developing personalized goals and then helping them find employment and housing and to connect to needed social services. Many agencies work in "silos" and only provide clients with information and resources in their programs; CEF takes a much broader, networked approach and thus is highly effective at helping people with a variety of personal needs and goals.
3. Many local government and non-profit agencies – including Orange County Departments of Housing and Social Services, the Chapel Hill Police Department, Inter-Faith Council for Social Services, and Freedom House Recovery Center - routinely refer their clients to CEF because of our person-centered approach. CEF's model of pairing two volunteers with each of our Members is looked to by our partners as filling a critical need for supportive services in our community.
4. We offer targeted services to members of our Advocate Program to build financial literacy and build personal savings through our matched savings accounts. The combination of one-on-one financial coaching and our unique financial products help members to address their present financial crisis *and* prepare to strengthen their families' financial futures for the long-term.

Finally, one critical issue the Advocate Program addresses is the need for a positive, supportive, and engaging community environment in which individuals experiencing or at-risk of experiencing homelessness can succeed. Through one-on-one advocacy work, CEF's Advocate Program focuses on building relationships that restore dignity and uphold the gifts and talents of each individual member. All too often, we see among our members that losing work and housing injures feelings of self-worth, self-esteem, and personal confidence. The Advocate Program works to reverse this reality and develop a community where all members can thrive and realize their individual worth and value.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

In FY 2015-16 we do not expect any operational or financial changes in CEF's Advocate Program.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

Anticipated external revenue sources for the program are as follows:

- Live to Give Charitable Trust (ongoing)
- Stewards Fund (ongoing)
- PNC Bank Foundation (ongoing)

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- Orange County Partnership to End Homelessness (OCPEH), Job Partners Program
  - CEF helped develop and now administers the OCPEH Job Partners Program which was created to help people with the highest barriers become job-ready and to find employment. Through this collaboration, we connect local employers with qualified, unemployed Orange County residents who have potential barriers to employment (e.g. criminal record, lack of work history, homelessness). This partnership has significantly enhanced the ability of Advocates to help members reach employment goals by acting as part of a formal, structured connection to county employers. Partner agencies in this collaboration include:
    - JobLink
    - Second Family Foundation
    - Orange Correctional
    - Vocational Rehabilitation, Inc.
    - Department of Social Services
    - Compass Center for Women & Families
    - UNC Temporary Services
    - Avant Staffing
- OCPEH, 100,000 Homes Task Force
  - CEF is a committed member of the 100,000 Homes Task Force, a collaboration of 20+ agencies in Orange County that coordinates services for vulnerable, unsheltered members of the community. This ongoing collaboration significantly enhances the results of CEF programs as we are in constant contact with key service providers who are engaged in treatment and support for our members. Advocates gain institutional knowledge and mentorship through this established partnership.
- Inter-Faith Council for Social Service and Housing for New Hope
  - CEF works closely with area homeless services to gain program referrals and accomplish our goal of enabling sustainable transitions out of homelessness.
- Center for Excellence in Community Mental Health & Freedom House
  - CEF partners with community mental health clinics and substance abuse counselors to provide ongoing advocate support to individuals in treatment. We assist in referring new clients to agency services, and accept referrals from both agencies for assistance in gaining employment, financial coaching, and savings assistance.
- Orange County Department of Housing, Human Rights & Community Development; CASA; Jackson Center; Justice United; EmPOWERment, Weaver Community Housing Association
  - CEF works with a collaboration of housing providers and housing advocates to ensure that Orange County residents who receive Housing Choice Vouchers (aka Section 8 vouchers) can find landlords willing to accept their vouchers. Arising after the largest corporate landlord housing a full 20% of Orange County's voucher-holders decided to no longer accept Housing Choice Vouchers, the collaboration has since evolved to address the broader crisis of the lack of

available housing for voucher-holders in our community – because of price, bias, stigma, and structural challenges. Our role has been to provide the one-on-one support to the tenants themselves, discerning their housing needs, locating the housing that will fit their needs, and making sure they have everything they need to successfully transition. The collaboration has been incredibly helpful at raising the public awareness of this issue, recruiting potential new landlords who would be willing to accept vouchers, and identifying structural barriers that can be remedied to ensure the process of locating housing for future tenants is much better than the challenges faced by current tenants in need of housing.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

CEF works with a significantly disadvantaged population:

- 100% of prospective clients earn below 50% of area median income
- Vast majority of clients earn below 30% of area median income
- 70% of clients are minorities
- 30% of clients have a disability
- 10% of clients are immigrants

CEF has built a reputation in the target community as a go-to agency to assist in transitions out of homelessness. Our Franklin Street office reflects these ideals and serves as a welcoming space for homeless or at-risk individuals to seek assistance, connect to resources, or just to escape the elements. We reach out to vulnerable and disenfranchised members of the community through word-of-mouth, partner agency referrals, and most importantly, client-to-client referrals. Since hiring two former members to teach two of our weekly Opportunity Classes, our class participation has quadrupled.

Additionally, CEF offers all of our services in Spanish to support families and community members of Hispanic ethnicity. CEF partners with El Centro Hispano and St. Thomas More to reach out to Spanish-speaking individuals, accept referrals, and offer our classes and programs in Spanish.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education		X		X
Health and Nutrition				
Job Training		X		X
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring		X		X
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
At least 100 members will gain greater employment.	Member meets with 1-2 CEF advocates to join the program, joins Opportunity Classes to gain career readiness and financial skills, and continues to meet with CEF advocates. Advocates assist member in crafting resume, applying for employment, navigating barriers to employment, preparing for interviews, and gaining transportation as needed.	91 total members gained employment	Number of program participants who gain employment between program entrance and exit, determined through regular updates and continued follow-up with members.
Fifty asset-poor households earning less than 30% AMI will achieve personal savings goals. At least 25 of 50 will achieve 50% or more of personal goals.	Member meets with CEF advocates to build a budget, make a personalized savings plan, and establish savings goals. Member opens a CEF Safe Savings Account, and Advocates assist members in achieving their savings plans and making regular deposits. When member achieves goal and graduates from Opportunity Classes, CEF matches savings at a rate of 10 percent.	89 total new accounts; 102 of all members have reached at least 50% of their goals. 28 reached their complete savings goal.	Calculated using CEF Safe Savings Account information, including an analysis of transactions, progress towards goals, and successful goal achievement.

25 members will have the capacity to prevent financial crisis with the savings they have accumulated.	Advocates assist members in opening accounts and assist members in maintaining positive balances through proactive budgeting activities.	42 members transitioned into housing and build the capacity to prevent financial crisis by accumulating savings.	Measured by members who have successfully transitioned into housing and have maintained positive savings balances over a threshold.
Increase our volunteer base to 150 active volunteers meeting regularly with CEF members.	Program Coordinator and student leaders conduct outreach activities through UNC departments, campus organizations, and affinity groups. Program Coordinator hosts regular trainings for new volunteers, and follows up through email and phone to coordinate pairing of new volunteers with CEF members to provide ongoing one-on-one assistance.	188 active volunteers	Analysis of volunteer activity records and training records.

If program(s) did not meet its stated goal(s), please explain:

In FY13-14, we came just shy of meeting our goals for increasing member employment. Out of a goal of 100 members gaining employment, CEF was able to assist 91 members to achieve this goal. We made modifications to our programming after this year to deepen our employment counseling support, specifically to address the barriers faced by our members who have criminal histories. _____

B. FY 2015-16 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
125 members will gain greater employment.	Member meets with 1-2 CEF advocates to join the program, joins Opportunity Class to gain career readiness and financial skills, and continues to meet with CEF advocates. Advocates assist member in crafting resume, applying for employment, navigating barriers to employment, preparing for interviews, and gaining transportation as needed. CEF will also manage the Job Partners initiative of the Orange County Partnership to End Homelessness as a means to assist members with criminal records and other barriers to attain employment by connecting directly with area employers.	At least 125 members in CEF's Advocate Program will gain greater employment.	Assess employment status upon intake and document changes in employment status through weekly meetings and regular follow-up with members.
At least 75 members will make progress towards personalized savings goals	Member meets with CEF advocates to build a budget, make a personalized savings plan, and establish savings goals. Member opens a CEF Safe Savings Account and Advocates assist members in achieving their savings plans and making regular deposits. When member achieves goal and graduates from Opportunity Classes, CEF matches savings at a rate of 10 percent. This year CEF will be adding new incentives to further encourage members to reach their personal goals.	At least 75 members will achieve 25% of their personal savings goal or greater. Savings goals are often long-term goals, and 25% represents a significant step for low-resource households towards building financial wellbeing.	Account and transaction records in CEF Safe Savings Accounts records. Accounts are maintained and managed by CEF, enabling CEF to monitor progress towards goals and successful goal attainment.

At least 40 households will transition into independent housing.	Member works with CEF advocates to search for housing, apply for housing, and navigate available social services to secure housing. CEF advocates connect members to resources for furniture and other items as needed for move-in.	40 households will transition from homelessness and into independent housing	Number of program participants who gain independent housing between program entrance and exit, determined through regular updates and continued follow-up with members
At least 150 volunteer advocates will provide active support to members.	Program Coordinator trains advocates in both generalist skills and specialized coaching (e.g. financial, employment, taxes, area resources). Coordinator convenes weekly meetings of volunteer team leaders, who in turn provide one-on-one support to advocates for troubleshooting challenges with members and brainstorming solutions.	CEF will maintain an active and committed group of at least 150 volunteer advocates to provide direct, relationship-based support to CEF members.	Check volunteer records to determine levels of activity and retention following volunteer training.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Community Empowerment Fund**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 13,985	$ 17,587	$ 21,359	21%
Program Generated Revenue (fees)	$ -	$ 7,788		-100%
Local Government Grants:				
Orange County	$ 5,000	$ 5,000	$ 7,500	50%
Town of Chapel Hill	$ 2,500	$ 2,500	$ 5,000	100%
Town of Carrboro	$ 1,500	$ 2,000	$ 2,500	25%
Other Local:	$ -	$ -	$ -	0
Other Local:	$ -	$ -	$ -	0
Other Local:	$ -	$ -	$ -	0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -	$ -	$ -	0
State Government	$ -	$ -	$ -	0
Federal Government	$ -	$ -	$ -	0
Other Grants: Live to Give Charitable Trust	$ 30,000	$ 30,000	$ 15,000	-50%
Other Grants: PNC Foundation	$ 6,000	$ 6,000	$ 6,000	0%
Miscellaneous/Other Revenue	$ 3,000	$ 19,000	$ 40,000	111%
Please list 3 largest Miscellanous sources:				
e Office of Durham and Regional A $ 4,000.00				
Bank of America Charitable $ 5,000.00				
Stewards Fund $ 10,000.00				
Total Program Revenue	**$ 61,985**	**$ 89,875**	**$ 97,359**	**8%**
PROGRAM EXPENSES				
Compensation	$ 51,147	$ 75,291	$ 84,635	12%
Rent & Utilities	$ 4,091	$ 5,380	$ 7,200	34%
Supplies & Equipment	$ 2,197	$ 2,966	$ 3,848	30%
Travel & Training	$ 536	$ 382	$ 557	46%
Other Expenses:	$ 4,014	$ 5,856	$ 1,119	-81%
Please list 3 largest "Other Expenses":				
Direct Assistance to Members $ 5,035.00				
Printing & Copying $ 700.00				
Online Services $ 500.00				
Total Program Expenses	**$ 61,985**	**$ 89,875**	**$ 97,359**	**8%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: One unit of service is one participant in CEF's Advocate Program. A Program Unit that Met Program Goals is defined as one participant achieving housing, employment or savings.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	849	284	$61,985	$218.25
Estimated FY14-15	972	350	$89,875	$256.79
Projected FY15-16	1,200	432	$97,359	$225.36

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Advocate Program

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	495	564	696	Durham City	205	274	338
Female	354	408	573	Durham County	229	301	372
2. **Ethnicity**				Raleigh City	3	4	5
African-American	373	425	525	Wake County	3	4	5
Caucasian	204	233	288	Town of Chapel Hill	417	475	576
Hispanic	38	43	53	Town of Carrboro	61	70	86
Other	234	271	335	Orange County	589	671	818
3. **Age**				Other (specify)	0	0	0
0-5 Years	0	0	0				
6-18 Years	7	10	12	Per cent of clients at, or below, federal poverty level	85	85	85
19-50 Years	384	438	541				
51+ Years	222	255	315		849	972	1200
Unknown	236	269	332	***TOTAL # OF CLIENTS SERVED***			

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Community Empowerment Fund

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 53,707	$ 47,627	$ 51,967	9%
Agency Generated Revenue (fees)	$ -	$ 8,000	$ -	-100%
Local Government Grants:				
Orange County	$ 5,000	$ 5,000	$ 7,500	50%
Town of Chapel Hill	$ 2,500	$ 2,500	$ 5,000	100%
Town of Carrboro	$ 1,500	$ 2,000	$ 2,500	25%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -	$ -	$ -	0
State Government	$ -	$ -	$ -	0
Federal Government	$ -	$ -	$ -	0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 63,009	$ 128,000	$ 151,000	18%
Please list 3 largest Miscellanous sources:				
Live to Give Charitable Trust $ 30,000.00				
Sloan Family Foundation $ 24,000.00				
Stewards Fund $ 15,000.00				
Total Agency Revenue	**$ 125,716**	**$ 193,127**	**$ 217,967**	**13%**
AGENCY EXPENSES				
Compensation	$ 90,318	$ 149,721	$ 169,270	13%
Rent & Utilities	$ 6,545	$ 13,330	$ 15,000	13%
Supplies & Equipment	$ 4,043	$ 6,730	$ 7,698	14%
Travel & Training	$ 462	$ 1,838	$ 1,015	-45%
Other Expenses:	$ 17,414	$ 21,508	$ 24,984	16%
Please list 3 largest "Other Expenses":				
Direct Assistance for Members $ 6,070.37				
Matching Savings Contributions $ 12,336.35				
Printing & Copying $ 5,100.00				
Total Agency Expenses	**$ 118,781**	**$ 193,127**	**$ 217,967**	**13%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 6,935**	**$ -**	**$ -**	**0**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Community Empowerment Fund

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Program Coordinator	1.00	45%	$22,638	$28,000	$35,000		H
Operations Coordinator	1.00	85%	$22,638	$28,000	$35,000		H
Opportunity Class Leaders	.75	0	$9,143	$12,000	$13,000		
Bookkeeper	.10	0	$780	$1,250	$1,500		
Advocate Program Coordinator (VISTA)	1.00	100%	$4,100	$5,200	$5,200		H (VISTA)
Savings Program Coordinator (VISTA)	1.00	10%	$3,542	$6,200	$6,200		H (VISTA)
Outreach Coordinator	.18 Volunteer FTE	50%	0	0	0	0	
Durham Program Coordinator	1.00	50%	0	$20,000	$20,000		
Durham Operations Coordinator	.25	50%	$3,452	$12,000	$20,000		
CEF Latino Coordinator	.18 Volunteer FTE	100%	0	0	0	0	
Resource Development Coordinator	.18 Volunteer FTE	100%	0	0	0	0	
Summer Interns	3.00-5.00 (Seasonal)	80%	$13,500	$14,500	$14,500		
9 Advocate Team Leaders	1.0 Volunteer FTE	100%	0	0	0	0	
Program Operations Intern	.25 Volunteer FTE	100%	0	0	0	0	

VOLUNTEER HOURS+ (32,000 annually total from advocates)	16.3 Volunteer FTE	100%	0	0	0	0	`

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: **Community Home Trust**

Street Address: 104 Jones Ferry Road Suite C, Carrboro, NC 27510

Mailing Address: P.O. Box 307, Carrboro, NC 27510

Website Address: www.communityhometrust.org

Executive Director: Robert Dowling

Telephone: 919-967-1545 E-Mail: rdowling@communityhometrust.org

Contact Person: Robert Dowling

Telephone: 919-967-1545 x307 E-Mail: rdowling@communityhometrust.org

Fax: 919-968-4030 Federal ID Number: 56-2141179

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$149,000	$231,000
Summary of intended use of funds: Community Home Trust is a nonprofit provider of affordable housing. Our mission is to strengthen our community with permanently affordable homeownership opportunities for low and moderate income households. We implement the inclusionary housing policies of local governments. We are requesting an increase in operating funding to enable the organization to successfully manage 230 permanently affordable homes in our inventory.		
Town of Chapel Hill	$200,000	$301,000
Summary of intended use of funds:		
Town of Carrboro	$35,000	$63,000
Summary of intended use of funds:		

Robert Dowling
Executive Director

January 15 2015
Date

Board Chair

1/14/15
Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:
   Community Home Trust (the Home Trust) was formed through the merger of Orange Community Housing Corporation (OCHC) into the Community Land Trust in Orange County (CLTOC) in July 2001. OCHC was incorporated in 1999 at the behest of the local governing bodies in order to retain affordable housing in Orange County.

   b. Years in Operation:
   25

   c. Mission or Vision Statement (if applicable):
   To strengthen our community with permanently affordable homeownership opportunities for low and moderate income households.

   d. Brief History of Agency:
   Community Home Trust (the Home Trust) was formed through the merger of Orange Community through the merger of Orange Community Housing Corporation (OCHC) into the Community Land Trust in Orange County (CLTOC) in July 2001. We convey ownership interests in our homes using a 99-year ground lease. The ground lease allows homeowners to earn a portion of the appreciation on their homes and ensures that homes will remain affordable for future generations. We sold our first home using a ground lease (called the community land trust model) in June 2000. We began implementing Chapel Hill's inclusionary housing program in 2001. As a result of inclusionary housing, our inventory grew quickly; we sold our 100th home in early 2006.

   The organization changed its name from Orange County Community Housing and Land Trust to Community Home Trust in July 2009.

   We primarily serve first-time homebuyers, who earn 80% or less of the area median income (as defined by HUD). As of December 2014, the average income of our homebuyers is $36,840. Our owners are individuals and families, who ordinarily would be unable to afford a home close to the employment center of Chapel Hill. The average cost of a Home Trust home in 2014 was $110,000.

Community Home Trust provides affordable housing in several different ways:

- As stated earlier, most of our work is generated by the local governments, who have asked us to implement their inclusionary housing policies. This involves working with private sector developers to ensure that 15% of their housing units are affordable to low or moderate-income households. We market these homes to income-eligible homebuyers. We then administer the ground leases, collect lease fees, manage the homeowner associations and handle all re-sales.

- We have developed our own housing, such as 14 Legion Road townhomes in Chapel Hill, 32 Rosemary Place townhomes in Meadowmont Village in Chapel Hill, and four single-family homes in Carrboro.

- We purchase existing homes, including six single-family homes in Culbreth Park, which we renovate and resell as Home Trust properties.

In 2008, we implemented a property management program to better ensure that Home Trust homes are well-maintained over time. We hired a property manager to manage homeowner associations and to implement our stewardship program. We support our homeowners, who face a financial crisis and are in jeopardy of foreclosure. For example, we have intervened with the banks to enable homeowners to remain in their homes while we sold the property to another qualified buyer. No Home Trust homeowner has ever lost his/her home to foreclosure.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). IF MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

   The funds we are requesting are operating funds needed to carry out the responsibilities inherent to an inclusionary housing program. Inclusionary housing, like other affordable housing programs, is designed to provide housing options for individuals and families that are not being made available by the private sector. In 2014, the average price of a home in Orange County was $353,279. The average price of a Home Trust home in 2014 was $110,000.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

   We anticipate that our programs will continue in 2015-16 much as they have for the past several years. Our operating budget has increased by $92,000 over 2014-15 due to the addition of a Director of Operations and a part-time property manager. Over the past 5 years, we have seen our inventory grow by 65%, however, our staffing level has remained the same. The board recognized that more staff was needed in response to the growing number of homes in our portfolio and the aging of our homes.

   Our proposed budget for 2015-16 is about $838,000. This represents a 12% increase over the revised 2014-15 budget.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

   Our main sources of revenue have been the following:
   1. Local Government funding
   2. Fee income
   3. Fundraising
   4. Ground lease income

For the 2015-16 fiscal year, we are requesting additional funding from the local governments, because we need additional revenues to better manage our portfolio of homes. Although we try to raise additional revenues from each revenue source, those sources are limited. For example with declining median incomes, it is more difficult to raise the prices of our homes in order to make fee income. Our fundraising has increased in recent years, but still only accounts for about 10% of our revenues. Ground lease income also grows very slowly as our inventory of homes grows.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

Community Home Trust works closely with local governments, private developers and mortgage lenders to implement a successful inclusionary housing program. We partner with for-profit developers who seek to build homes in Chapel Hill, Carrboro and Hillsborough. Working with developers of such properties as 140 West Franklin, Ballentine and Burch Kove, requires substantial staff involvement to ensure successful housing opportunities for low-income households. It is imperative that we develop a clear understanding of what we are selling, including each unit's floor plan, square footage and finishes, how the Owners Association is structured, what the monthly assessments will be, and what sources of subsidy are available. Each of these partnerships is similar, yet they all include unique components that we must document and convey to our buyers.

For many years, we have coordinated with other local nonprofit organizations to provide free First Time Homebuyer Education, an eight-hour course taught by a certified housing counselor. We continue to share this responsibility with Habitat for Humanity of Orange County and EmPowerment Inc. We also have assisted the Jackson Center with its work in Northside. This work continues today. Lastly, we provide ongoing financial counseling to members of the community as well as recipients of Section 8 vouchers that are participating in the homeownership program.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

We receive referrals from our partner agencies, Habitat for Humanity of Orange County and EmPowerment, both of whom serve minority populations (African American and immigrants). We recently hired a Spanish-speaking realtor and have targeted the Latino community via a local bank and church. We do direct marketing through the public school system, whose student enrollment is 47% non-Caucasian. We encourage our existing homeowners, especially our Burmese and Karin populations, to refer prospective applicants. Since our inception, approximately 33% of our homebuyers are self-identified as minorities (including Black, Hispanic and Asian) and 67% of our homebuyers identify as Caucasian/White.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing		x	x	x
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
The primary goal of our homeownership program is to provide permanently affordable homeownership opportunities to low-income individuals and families. Further, we strive to implement a successful inclusionary housing program, wherein affordable homes are integrated into new developments and are well maintained over time. The outcome objectives for 2013-14 were as follows: The Home Trust will work with private sector developers to add **8-12 new homes** to the Home Trust in 2013-14. These homes will be in Ballentine, 140 West Franklin Street and South Grove. We also expect **15-20 re-sales** of existing Home Trust properties	There are a great many specific activities required of staff to implement our homeownership program. Key activities are our outreach efforts, our homebuyer education efforts and our post-purchase efforts with homeowners and homeowner associations. Our outreach efforts include public school teachers, UNC employees and other public sector employees who are likely to be eligible to purchase Home Trust homes. We also work through the local REALTOR® community to reach new populations of prospective buyers. In addition, we will: • provide homebuyer education to every buyer • work with each buyer to assist them with bank financing • educate every buyer as to the nuances of the Home Trust model • work with every buyer to close on their home, and • offer post-purchase maintenance assistance to every homeowner	The Home Trust sold 40 homes in FY 2013-14, 24 of which were new to our inventory. We also provided 54 people with homebuyer education classes, and provided 85 individuals with free financial counseling.	Evaluation of homes sold is very straight forward. Until a home closes, it is not sold. In 2013-14 we exceeded our goals, which happens sometimes. In other years, we fail to reach our goals. It is difficult to predict how many homes will sell or resell in advance. With our homebuyer education and financial counseling sessions, it is difficult to measure the effectiveness of the training. The ultimate goal is to have successful homeowners who are able to afford and maintain their homes.

If program(s) did not meet its stated goal(s), please explain:

We exceeded our goals in 2013-14.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Our homeownership program is designed to allow low-income households to own homes in Orange County, close to centers of employment. Inclusionary housing increases diversity by integrating low and moderate income households into market rate neighborhoods.	Although we always seek to improve our performance and become more effective, the basic program activities that we undertake remain the same. As stated above the key activities are our outreach efforts, homebuyer education buyer qualification and preparation and our post-purchase efforts with homeowners and homeowner associations. We are constantly expanding our marketing and outreach to create more awareness of our housing opportunities. As stated above much of our focus is on public sector employers such as UNC, UNC Health Care, local governments and the school district. We also work through the local REALTOR® community to reach new populations of prospective buyers. In addition, we will: • provide homebuyer education to every buyer • work with each buyer to assist them with bank financing • educate every buyer as to the nuances of the Home Trust model • work with every buyer to close on their home, and • offer post-purchase maintenance assistance to every homeowner We also engage in a wide variety of property management activities, including managing homeowner	The Home Trust will work with private sector developers to add **4 - 6 new homes** to the Home Trust in 2015-16. We expect these homes will be in the Burch Kove and South Grove developments. We also expect **15-20 re-sales** of existing Home Trust properties	Evaluation will be based upon the number of homes that we have marketed and sold to income-eligible buyers. We will be successful if we are able to close 4-6 new homes and 15-20 re-sales of existing Home Trust homes in reasonable timeframes. A successful home maintenance program will enable these homes to sell more easily. As always, achieving these goals is based on many factors that are beyond our control. But our closings will be the indicator of our success in meeting this goal.

	associations, assisting homeowners with repairs and administering our stewardship program.		

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Community Home Trust

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 72,403	$ 67,633	$ 70,000	3%
Program Generated Revenue (fees)	$ 232,966	$ 144,084	$ 138,712	-4%
Local Government Grants:				
Orange County	$ 149,000	$ 149,000	$ 231,000	55%
Town of Chapel Hill	$ 200,000	$ 200,000	$ 301,000	51%
Town of Carrboro	$ 35,000	$ 35,000	$ 63,000	80%
Other Local: Town of Hillsborough	$ 2,500	$ 2,500	$ 2,500	0%
Other Local: HOME Program	$ 18,000	$ 11,777	$ 11,777	0%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: GSK		$ 40,000		-100%
Other Grants: BofA/Wells Fargo		$ 8,000	$ 15,000	88%
Miscellaneous/Other Revenue	$ 5,327	$ 5,507	$ 5,800	5%
Please list 3 largest Miscellanous sources:				
Interest Income $ 5,053.00				
Miscellaneous $ 274.00				
$ -				
Total Program Revenue	$ 715,196	$ 663,501	$ 838,789	26%
PROGRAM EXPENSES				
Compensation	$ 513,265	$ 601,823	$ 695,351	16%
Rent & Utilities	$ 40,975	$ 43,153	$ 44,560	3%
Supplies & Equipment	$ 5,311	$ 3,715	$ 5,100	37%
Travel & Training	$ 9,198	$ 13,500	$ 14,200	5%
Other Expenses:	$ 67,872	$ 84,713	$ 79,548	-6%
Please list 3 largest "Other Expenses":				
Audit $ 15,000.00				
Development Expenses $ 8,047.00				
IT Services $ 7,040.00				
Total Program Expenses	$ 636,621	$ 746,904	$ 838,759	12%
SURPLUS/(DEFICIT) FOR PERIOD:	$ 78,575	$ (83,403)	$ 30	100%

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]:

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	226	226	$636,621	$2,817
Estimated FY14-15	235	235	$746,904	$3,178
Projected FY15-16	241	241	$838,759	$3,480

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	19	4	NA	Durham City			NA
Female	28	15	NA	Durham County	1	1	NA
2. **Ethnicity**				Raleigh City			NA
African-American	5	13	NA	Wake County	1		NA
Caucasian	38	14	NA	Town of Chapel Hill	50	34	NA
Hispanic	7	3	NA	Town of Carrboro	6	3	NA
Other	11	3	NA	Orange County	2	2	NA
3. **Age**				Other (specify)	4	3	NA
0-5 Years	4	6	NA				
6-18 Years	8	8	NA	Per cent of clients at, or below, federal poverty level	0	0	NA
19-50 Years	40	16	NA				
51+ Years	10	3	NA		64	43	
Unknown	2	10	NA	***TOTAL # OF CLIENTS SERVED***			NA

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Community Home Trust

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 72,403	$ 67,633	$ 70,000	3%
Agency Generated Revenue (fees)	$ 232,966	$ 144,084	$ 138,712	-4%
Local Government Grants:				
Orange County	$ 149,000	$ 149,000	$ 231,000	55%
Town of Chapel Hill	$ 200,000	$ 200,000	$ 301,000	51%
Town of Carrboro	$ 35,000	$ 35,000	$ 63,000	80%
Other Local: Town of Hillsborough	$ 2,500	$ 2,500	$ 2,500	0%
Other Local: HOME Program	$ 18,000	$ 11,777	$ 11,777	0%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: GSK		$ 40,000		-100%
Other Grants: BofA/Wells Fargo		$ 8,000	$ 15,000	88%
Miscellaneous/Other Revenue	$ 5,327	$ 5,507	$ 5,800	5%
Please list 3 largest Miscellanous sources:				
Interest Income $ 5,053.00				
Miscellaneous $ 274.00				
$ -				
Total Agency Revenue	$ 715,196	$ 663,501	$ 838,789	26%
AGENCY EXPENSES				
Compensation	$ 513,265	$ 601,823	$ 695,351	16%
Rent & Utilities	$ 40,975	$ 43,153	$ 44,560	3%
Supplies & Equipment	$ 5,311	$ 3,715	$ 5,100	37%
Travel & Training	$ 9,198	$ 13,500	$ 14,200	5%
Other Expenses:	$ 67,872	$ 84,713	$ 79,548	-6%
Please list 3 largest "Other Expenses":				
Audit $ 15,000.00				
Development Expenses $ 8,047.00				
IT Services $ 7,040.00				
Total Agency Expenses	$ 636,621	$ 746,904	$ 838,759	12%
SURPLUS/(DEFICIT) FOR PERIOD:	$ 78,575	$ (83,403)	$ 30	100%

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Finance Manager	1.0	100	47,885	56,183	57,647	7%	R,H
Administrative Assistant	1.0	100	31,213	34,452	34,712	4%	R,H
Executive Director	1.0	75	80,000	95,365	97,850	12%	R,H
Development & Communications Coordinator	1.0	75	38,942	48,473	49,668	6%	R,H
Property Manager	1.0	100	53,798	54,501	56,020	7%	R,H
Senior Sales Associate	1.0	100	31,761	34,046	43,262	5%	R,H
Sales Associate	.50	100	925	24,618	24,960	3%	R
Sales Manager	1.0	100	52,173	60,261	61,831	7%	R,H
Director of Operations	1.0	100	60,030	18,000	65,600	7%	R,H
Assistant Property Manager	..625	100	NA	22,285	30,418	4%	R

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: Total Volunteer Hours = Volunteer FTE
  1,960

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **The Women's Center, Inc. dba Compass Center for Women & Families**

Street Address: 210 Henderson Street; Chapel Hill, NC 27514

Mailing Address: Post Office Box 1057; Chapel Hill, NC 27514

Website Address: www.compassctr.org

Executive Director: Ardith Burkes

Telephone: (919) 968-4610 E-Mail: director@compassctr.org

Contact Person: Ardith Burkes and Laura Nicholson

Telephone: (919) 968-4610 E-Mail: finances@compassctr.org

Fax: (919) 932-3125 Federal ID Number: 56-1271474

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$64,500	$65,000
Summary of intended use of funds: **1) Domestic Violence Crisis Services** **2) Self Sufficiency Programs: Legal Information, Financial Education & Career Preparedness** **3) Community Education & Civic Engagement**		
Town of Chapel Hill	$29,300	$29,500
Summary of intended use of funds: **1) Domestic Violence Crisis Services** **2) Self Sufficiency Programs: Legal Information, Financial Education & Career Preparedness** **3) Community Education & Civic Engagement**		
Town of Carrboro	$8,400	$8,500
Summary of intended use of funds: **1) Domestic Violence Crisis Services** **2) Self Sufficiency Programs: Legal Information, Financial Education & Career Preparedness** **3) Community Education & Civic Engagement**		

Ardith Burkes
Executive Director

Peggy Masse
Board Chair

Jan. 20, 2015
Date

Jan. 20, 2015
Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: The Women's Center was established in 1979.

   b. Years in Operation: 35

   c. Mission or Vision Statement (if applicable):

      Compass Center for Women and Families helps individuals and families build stable lives by preventing domestic violence and increasing self-sufficiency. We provide domestic violence crisis services, career and financial education, assistance with legal resources, adolescent empowerment programs, as well as civic engagement and connections to community resources.

   d. Brief History of Agency:

      Compass Center for Women and Families was created from the 2012 merger of Family Violence Prevention Center of Orange County (established in 2000) and The Women's Center, Inc. (established in 1979). Our services span the continuum from direct domestic violence services, including crisis response and court advocacy, to longer term tools for self-sufficiency, including financial literacy education, career exploration and preparedness, access to legal information, adolescent empowerment programs, and connections to community resources. We have a vision of empowerment for all of our clients that includes safety, security, and economic self-sufficiency. Since their inception, both agencies have served as a leaders in our community. The Women's Center, Inc. is highly regarded for improving the lives of women and girls in the Triangle through our own work and through collaborative community partnerships. FVPC has been known for providing comprehensive and high-quality domestic violence crisis services. The two agencies often experienced client overlap and decided that a merger would conserve resources while providing more comprehensive and efficient services. By combining agencies, Compass Center clients are able to access a larger continuum of important services under one roof.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

PROGRAM 1: DOMESTIC VIOLENCE CRISIS SERVICES

The Domestic Violence Crisis Services Program provides needed support services to victims of domestic violence that are unavailable through any other venue in Orange County. Specifically, the community needs we will continue to address are:

Immediate response to calls through operation of a dedicated 24-hour domestic violence hotline: All callers can expect to receive services from a compassionate, well-trained individual ready to offer emotional support, safety planning, resource information, and other available services.

Direct crisis intervention and advocacy services: Trained staff will accompany victims to criminal and civil court, provide assistance with obtaining domestic violence protective orders, help clients file for victims' compensation through the state, and help clients find emergency shelter and other needed resources.

Support Groups: We offer a variety of 8-week support groups for adults affected by domestic violence. In addition, we offer monthly art-base healing groups and workshops throughout the year.

Access to emergency financial support: Most domestic violence victims are unable to leave abusive relationships without financial assistance to pay for food and rent during the transition period when they are moving towards self-sufficiency. We provide limited financial assistance directly to victims of domestic violence in the form of gas cards, grocery cards, and transportation payments to assist with this transition.

Assistance accessing safe shelter: While we do not have a physical shelter specific to victims of domestic violence, and do not have emergency shelter for women with families in Orange County, we do help victims identify other shelter options. We work with victims to get placed in shelters in other counties and coordinate with local hotels to provide emergency shelter to our clients for free or low cost (paid by Compass Center).

The need for a cell phone to call 911: Many victims do not have the resources to purchase a cell phone (or an abusive partner may regulate use of a phone) or theirs has been destroyed or confiscated as part of the violence they are experiencing. We provide a cell phone that is limited to calls to 911in order to expand safety options.

PROGRAM 2: SELF SUFFICIENCY PROGRAMS

Legal Information: Compass Center's Legal Information program can help to address some of the needs in our community through legal clinics, workshops, and information services as well as referrals to other area agencies. In North Carolina, there is only one Legal Aid attorney for every 6,415 low-income people while there is one private attorney for every 429 people who are above the poverty threshold (Legal Aid of NC). According to the NC Equal Access to Justice Commission, an estimated 80 percent of the civil legal needs of low-income families go unmet every year. These legal needs may be related to "domestic violence, divorce, child custody, housing, consumer protection, employment, (and) health", which are all areas that have a major impact on peoples' lives and in which legal expertise is crucial (NC Equal Access to Justice Commission). Women in our community are more likely than men to lack legal representation (U.S. Equal Employment Opportunity Commission).

Financial Literacy Education: Orange County has a clear need for the financial education services that Compass Center for Women and Families provides, including individual

financial counseling, educational workshops, and referrals to other area agencies and resources.

Although the country is on the road to financial recovery, women have benefited less from the economic growth than men. Compass Center offers financial literacy education programs to help manage money, save to buy a home, prepare taxes, and address any credit/debt issues, helping individuals meet their financial goals. While the overall unemployment rate has dropped over the course of the recovery, women's unemployment rate increased from 7.6 percent to 7.9 percent from June 2009 to December 2011 (National Women's Law Center, 2012). Women only gained three percent from the 1.4 million net jobs added to the economy during that time period. Certain groups of women have been hit hardest: unemployment rates for African American women have increased from 11.6 percent to 13.9 percent over the course of the recovery, and rates for single mothers have increased from 11.7 percent to 12.9 percent (National Women's Law Center, 2012).

These rising unemployment rates are reflected in the increasing local poverty rates. In Orange County in 2008, 13.9 percent of the population was living below the poverty line. By 2012, the percentage had risen to 17.4, which is over 21,000 residents (US. Census Small Area Income and Poverty Estimates, 2008, 2012). Female-headed households had the highest poverty rate in North Carolina at 31.2 percent, compared with single men at 18.9 percent, according to a study conducted by the Center on Poverty, Work and Opportunity at UNC- Chapel Hill.

Also contributing to poverty among women is the reality of gender pay disparities that continues to be a problem in the United States. According to the federal government's *Women in America* report, women still earn less than men, which leads to fewer resources to contribute to retirement savings and smaller social security payments they can rely on receiving. Because of these factors, women need to save more than their male counterparts throughout their lives. However, the Women in America report found that two out of three women say that they have little or no knowledge of financial products and services.

Volunteer Income Tax Assistance (VITA): The County has an urgent need for the tax preparation and outreach services provided by the Compass Center for Women and Families' VITA program to ensure that eligible workers can receive the full amount of tax credits they've earned. Volunteer Income Tax Assistance (VITA) programming contributes to the health of our community. The Federal Earned Income Tax Credit (EITC) is one of the most effective Federal programs aimed at reducing poverty in the United States. In 2009, the EITC lifted about 6 million people out of poverty, including about 3 million children. (Center on Budget and Policy Priorities, 2012). However, not everyone who is eligible for this critical benefit actually receives it. In 2011, 20% of those eligible nationwide did not claim their EITC. This means that an estimated 233,300 eligible North Carolinians did not receive this important tax benefit (www.eitc.irs.gov/central/eitcstats). Some potential causes of this disparity are that many people do not know they qualify or do not know how to claim the credits.

In addition, low-income families who claim the EITC are more likely to purchase Refund Anticipation Loans (RALs) loans to receive their benefit. In 2006, low-income families in the U.S. lost $3.1 billion of their EITC benefits to these high-interest, short-term loans, as well as tax preparation fees and other financial products issued by commercial tax

preparers (Children's Defense Fund, 2009). Lastly, these tax credits are known to put dollars directly back into local economies, increasing the value to our community's economic stability.

Of the 1,889 individuals or couples served in 2014, 348 or 18.42% were recipients of the Earned Income Tax Credit. Total Earned Income Credits earned this year totaled $409,134. Child Tax credits totaled $248,064 (231 clients, 12.2% of clients) and Education Tax Credits totaled $89,368 (119 clients, 6%). The average AGI of clients was $30,345. Net Federal Refunds totaled $1,803,617 and NC State Refunds totaled $336,649. Total state and federal refunds were higher this tax year than last year. In addition, the clients saved $283,350 in tax preparation fes (calculated as 1,889 clients paying the average tax preparation fee of $150).

Career Exploration and Preparedness: Many of the individuals that our agency serves are women or men who have been absent from the workforce while they worked in their home to raise children or care for other family members. After separation from a spouse or other loss of the financial support, these individuals face a unique set of challenges as they work to achieve financial independence. Other women and men may also need assistance due to the anticipated loss of public assistance as the parent of a minor child. Cash assistance to families through the Work First Family Assistance (WFFA) program is limited to 24 months. The NC Division of Social Services estimates 230 families receiving WFFA in Orange County as of January, 2012. Our program can assist those on public benefits to become self-supporting when their benefits end by providing career and financial counseling, and referrals to other community resources. The Program Director collaborates with area organizations to ensure that our agency reaches a diverse client base that demonstrates a need for our programs and services. Current partnerships with other work force development programs include: Orange County Skills Development Center, Durham Technical Community College, and Dress for Success.

PROGRAM 3: COMMUNITY EDUCATION AND CIVIC ENGAGEMENT

The Community Education component of our program will address the need for training and community awareness by delivering trainings and workshops to build skills and knowledge, disseminating information through various channels and individual and group support. The Civic Engagement component of our program at Compass Center will provide client and community education, advocacy, and collaboration and leadership with other area agencies.

According to a study conducted at UNC-Chapel Hill, female-headed households have a 32 percent poverty rate, the highest rate of all households in North Carolina (Center on Poverty, Work, and Opportunity, 2012). Single, low-income women "frequently experience a lack of informational support and have difficulty connecting with others" who can provide them with knowledge and community resources (Campbell-Grossman, Hudson, Keating-Lefler & Fleck, 2005). Many of these women are not aware of the resources available in their communities, and this lack of informational, emotional, and financial support can lead to high levels of stress and feelings of depression (Campbell-Grossman et al.,2005). In addition, women in our community are more likely than men to live in poverty, be paid substandard wages, lack basic education or have the least

opportunity for advancement, and be the sole caretakers of children (*Orange County Commission for Women, 2012*).

According to the Triangle Community Foundation, civic engagement refers to "individual or collective actions designed to identify and address issues of public concern." There are many types of civic engagement, including volunteerism, community group involvement, and electoral and other political participation. There is a need for increased involvement in these activities in order to change the underlying policies, cultural beliefs, and systems that prevent women from being fully engaged in their communities as decision-makers and leaders. This is why we are committed to engaging the community during Women's History Month and Domestic Violence Awareness Month.

As an agency that values self-sufficiency, and works with women who are survivors of domestic violence, education is very important to us. We believe that education is the key to stopping on-going violence and, through youth education, preventing violence in the next generation. We reach thousands of adolescent and adult community members annually in our education efforts and are very proud of what we are accomplishing. Interpersonal violence prevention programs are targeted to other community professionals, youth in middle school, and the community at large.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

PROGRAM 1: DOMESTIC VIOLENCE CRISIS SERVICES Due to the increase in clients seeking domestic violence services we are trying to expand our capacity to meet these needs and are exploring additional funding sources to hire another domestic violence program staff member. Our Spanish language services for victims of domestic violence is funded by two grants which end in June 2015. We have applied for additional grants to cover these services but it is unclear at this time if we will be able to support the program as it stands now with a full-time bilingual staff member.

PROGRAM 2: SELF SUFFICIENCY PROGRAMS We are seeking local funding for the Career Exploration and Preparedness program, a program with a long history in our community. This program was funded for many years by the NC Council for Women through Displaced Homemaker funds, and, as of July 1, 2014, was de-funded and Displaced Homemaker funds no longer exist to support this work. Because this program is so well run, using professional volunteers and achieving good outcomes, Compass Center is seeking alternative funding and expanded collaborations in order to have this program remain. This is an essential component to the continuum of services that we provide to our clients, both those in domestic violence situation and other men and women.

Our Financial Literacy Education program will experience some shifts due to funding changes including Council for Women Divorce Filing Fees being reduced (transition at state level of funding from serving self-sufficiency programs to being allocated to serve victims of domestic violence) and United Way changing to a collective impact funding model for which we will apply but are unsure of the funding. This means that we will plan to provide individual financial counseling but might not have the staff capacity to recruit for and coordinate financial workshops or financial coaching and support groups.

PROGRAM 3: COMMUNITY EDUCATION AND CIVIC ENGAGEMENT No changes anticipated.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

PROGRAM 1: DOMESTIC VIOLENCE CRISIS SERVICES Compass Center receives support from several state grants to deliver domestic violence crisis services and from United Way in the amount of $18,459 for calendar year 2014 for delivering services to Spanish speaking individuals. The full costs of programming, however, are not covered and we will not know about calendar year 2015 United Way funding until March 2015.

PROGRAM 2: SELF SUFFICIENCY PROGRAMS To deliver VITA services, Compass Center will continue to apply for funding from United Way of the Greater Triangle. In 2013 and 2014, United Way awarded Compass Center for Women and Families $9,500 for calendar years, which was split between our agency and RSVP. We will not know about calendar year 2015 funding until March 2015. Compass Center has also received $1,896 from the IRS/CCAP EITC/VITA project through a coalition and expects to distribute funding again next year.

We will apply for funding through the United Way of the Greater Triangle's Regional Financial Stability Initiative which we have received in past years, but will not know about calendar year 2015 funding until March 2015. Compass Center has also received funding from United Way for financial literacy education and we are funding through calendar year 2014 in the amount of $20,749.

Other sources of funding for all programs and general operating expenses for Compass Center come from grants, individuals, fundraising and special events.

PROGRAM 3: COMMUNITY EDUCATION AND CIVIC ENGAGEMENT Delivering Community Education programming is expected of most state grants but is not directly funded by any. The majority of funds for this program come from Town and County Sources, Fundraisers, and Private Donations. Compass Center feels these services are vital to our mission and will continue to provide them despite ongoing funding challenges.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

PROGRAM 1: DOMESTIC VIOLENCE CRISIS SERVICES

We continue to recognize that the best response to domestic violence is a **community-wide, coordinated** response. Our past and ongoing collaborative relationships with numerous organizations, to ensure necessary services for our clients, have included local law enforcement agencies, the District Attorney's Office, the Orange County Department of Social Services (DSS), Inter-Faith Council (IFC), Legal Aid of North Carolina, UNC Hospital's Beacon Child and Family Program, the Orange County Rape Crisis Center, UNC Office of the Dean of Students, UNC School of Law's Domestic Violence Advocacy Project (DVAP), El Centro Hispano, and domestic violence agencies in neighboring counties.

Some specific examples of ongoing collaborative efforts include:

- Over the past year and a half, Compass Center has successfully spearheaded efforts to reinstate the Orange County Domestic Violence Task Force. This is based on the effective coordinated community response model of engagement and problem solving between agencies that interact with victims of domestic violence. This includes law enforcement, Legal Aid, victim advocates, DSS, crisis unit personnel, medical personnel, batterer's intervention program staff, magistrates, school personnel, etc. The task force meets monthly.
- Cross-referrals and training with Orange County Rape Crisis Center, UNC's Beacon Program, CH-TOP Early Head Start/Head Start, local schools, DSS, Durham Crisis Response Center, Family Violence and Rape Crisis Services of Chatham County and Interact of Wake County.
- Work with Orange County DSS to refer low-income families for emergency assistance for food and other basic needs. Provide crisis services and educational workshops for families experiencing domestic violence who are DSS or CPS clients.
- Collaboration and cross-referral with seven law enforcement agencies in Orange County and interaction daily or weekly with crisis unit in the Orange County Sheriff's Office and the Chapel Hill Police Department. These agencies also assist with volunteer hotline and advocate training. Several times per year we are part of the training of Crisis Intervention Team training of select law enforcement officers.
- The Orange County District Attorney's office collaborates with our court advocate and helps with hotline and advocate training.
- Work with Legal Aid of North Carolina to help clients access legal services.
- Continued partnerships with UNC School of Social Work as a field placement site for three MSW students, APPLES undergraduate service learning program, and UNC LGBTQ Center.
- KIRAN, a regional nonprofit focused on Southeast Asian victims of domestic violence, provided training for our staff and volunteers to provide more culturally competent services to local victims and local interpreters for Burmese victims.
- El Centro Hispano has offered us space to offer outreach to their clientele.
- Partner with local businesses to provide pro bono services for victims such as free shelter at local hotels and pet boarding.

PROGRAM 2: SELF SUFFICIENCY PROGRAMS

Our past and ongoing collaborative relationships with numerous organizations, to ensure necessary services for our clients include

- UNC School of Law: We provide students with a regular Pro Bono opportunity with client contact through our Community Legal Project. We are committed to UNC's internship program for summer interns.
- Consumer Education Services, Inc. (CESI) is dedicated to improving the consumers' quality of life by providing avenues and tools for financial independence and financial freedom. CESI partners with Compass Center on financial literacy education workshops

that provide solutions for our clients' financial situations.

- Earned Income Tax Credit Coalition: In partnership with Retired Seniors Volunteer Program, Compass Center created the Orange County EITC Coalition to expand the pool of volunteers, times, and locations for the Volunteer Income Tax Preparation Assistance program. In 2014, the Orange County EITC sponsored 9 VITA sites throughout the county and helped 1,889 community members file their taxes.
- United Way of the Greater Triangle: Compass Center is a certified Partner Agency of United Way and serves on committees and task forces as requested.
- Orange County Department of Aging: Retired Seniors Volunteer Program (RSVP): Compass Center partners with RSVP to expand recruitment efforts for volunteers, including Financial Counselors and tax preparers for the VITA program. RSVP trains and places VITA volunteers at Compass Center.
- Chapel Hill Carrboro Chamber of Commerce and small business owners: we work closely with the Chamber to promote our services and recruit volunteers to provide workshop and individual professional services, as well as work on boards and committees.
- Interfaith Council: working to develop deeper collaboration in the coming year to provide more accessible self-sufficiency services.
- Durham Technical Community College: works with our career advising program participants.
- Orange County JOBLINK: we collaborated on a social media job networking for job seekers, an onsite workshop for our clients and those served by JOBLINK.

PROGRAM 3: COMMUNITY EDUCATION AND CIVIC ENGAGEMENT

Our past and ongoing collaborative relationships with numerous organizations, to ensure necessary services for our clients, have included El Centro Hispano, Orange County Health Department, Piedmont Health Services, Cardinal Innovations, local schools, Triangle Community Foundation, UNC LGBTQ Center, UNC MSW Field Placement Office, APPLES service learning program and Interfaith Council.

Some specific examples of ongoing collaborative efforts include:

- Chapel Hill-Carrboro City Schools: work with staff and volunteers to schedule Start Strong dating violence and bullying prevention programs and M.A.G.I.C. media literacy education programs for middle school youth.
- Information and Referral Services: we collect information from a broad range of organizations so that we can offer the highest quality information to people who call us. In order to do this, we contact each referral source on an annual basis to ensure that we have updated information and so that these agencies know about our services and programs. United Way of the Greater Triangle and the Third Sector Alliance provide meeting grounds for multiple non-profits and businesses in our community so that we remain up to date on current needs and trends.
- El Centro Hispano – Carrboro Branch: We cross-refer clients and maintain open lines of communication so that we can help identify needs of the Latina community and avoid duplicating services. They allow us to use their space as needed to meet with Spanish-speaking clients if this best suits the needs of the client and we present professional and community trainings to their staff and clients.

- UNC's LGBTQ Center: We periodically table at conferences held by the Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ) Center to inform this group of our services and to work to foster a safe inclusive environment for all people of all sexualities, gender identities and gender expressions.
- Local medical and mental health clinics such as Piedmont Health Services, El Futuro and Cardinal Innovations ask us to provide professional training for their staff related to domestic violence assessment and response and community education presentations for clients and those who might be being victimized.
- CH-TOP Early Head Start/Head Start: We provide professional trainings and community trainings for their staff or clients about domestic violence and our full array of agency services. We cross-refer clients as services are necessary.
- NC Council for Women provides information on Women's History Month (March).
- NC Coalition Against Domestic Violence provides information on Domestic Violence Awareness Month (October).

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Inclusiveness is an important organizational value and our primary goal is to maintain and strengthen our commitment to diversity. Based on Compass Center's mission to serve all populations regardless of ethnic origin, race, sexual orientation, gender, gender identification, religion and socioeconomic status, we strive to serve persons from all ethnic and minority groups who are in need of our services. Additionally, we strive to ensure that members of traditionally underrepresented groups serve in positions of leadership within the organization as staff, Board of Directors representatives, and as program volunteers. Our current group of staff and volunteers is more racially diverse than ever before.

Compass Center has made a commitment to identify and respond to needs that arise as demographic shifts occur within our community, and we will provide outreach to various cultural, ethnic, and age-specific groups. For Spanish-speaking clients, we provide domestic violence services in Spanish, we have staff and volunteers who provide outreach and support to the monolingual Spanish-speaking clients, and we have a bilingual phone message as well as information in Spanish on our website.

Finding interpreters and translators for other languages has been challenging, particularly for the Burmese refugee population that is increasingly accessing domestic violence services. We have volunteer and paid interpreters who help us meet this need.

This past year our efforts to be culturally diverse included:

- Training all staff members and volunteers to work with individuals from diverse backgrounds through a cultural competency training. We achieve this by including 2 hours of education in our volunteer trainings, which also includes required reading about serving clients with disabilities, persons of color, persons who speak languages other than English, and clients who identify as part of the LGBTQ community. We have a presentation on working in culturally sensitive ways with clients.
- Minimizing the language barrier for our Spanish-only speaking clients by having two staff and several volunteers who are fluent in Spanish.

- Participating in Project Homeless Connect for homeless citizens to connect with resources. We had 3 staff people at this year's event providing services on-site.
- Participating in the Orange County Refugee Health Coalition.
- Making a number of community education presentations in the past year targeted at minority groups to ensure that those communities were aware of the services that we are able to provide.
- Providing domestic violence prevention sessions to Early Head Start families in Spanish and in Burmese dialects.
- Working with staff and clients at El Centro Hispano whose work assists the Latino Community.
- Making multiple presentations on domestic violence and its effects and our services to clients in the DSS WorkFirst program.
- Participating at local school health and service fairs for Spanish and English speaking families.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

PROGRAM 1: DOMESTIC VIOLENCE CRISIS SERVICES

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X	X	X
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation	X	X	X	X
Housing				
Other: Safety Net for Vulnerable	X	X	X	X

PROGRAM 2: SELF SUFFICIENCY PROGRAMS

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X	X	X
Health and Nutrition				
Job Training		X	X	X
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				

Other: Safety Net for Vulnerable		X	X	X
Career Preparedness		X	X	X
Legal Information		X	X	X
Financial Literacy Education		X	X	X

PROGRAM 3: COMMUNITY EDUCATION & CIVIC ENGAGEMENT

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X	X	X
Health and Nutrition				
Job Training		X	X	X
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other: Civic Engagement/Volunteerism		X	X	X
Interpersonal Violence Prevention	X	X	X	X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

PROGRAM 1: DOMESTIC VIOLENCE CRISIS SERVICES

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Crisis Intervention: 85% of clients who meet with crisis response staff will develop a safety plan that meets their needs and helps them feel that they have options to improve their safety	Provide direct services to victims of domestic violence.	Of the 979 clients served through our 24-hour hotline and in-person counseling and support groups, 94% developed a safety plan and 97% better understood their options. Our domestic violence support group program served over 129 people: several 8-week groups for adult female survivors of domestic violence (one in Spanish), self-esteem and divorce and separation groups, 5-week Photovoice: Healing through Photos group, monthly Art of Healing workshops, and two 8-week children's coping skills groups.	All clients who meet in person with crisis response staff or attend support group are asked to fill out a survey and responses are tracked.
Court Advocacy: 90% of clients will report feeling supported by court advocates through the court process.	Provide court services to victims of domestic violence to reduce the trauma and confusion that clients experience in the court process.	Court advocacy was provided in civil court for 151 clients and in criminal court for 106 clients. 100% of clients reported feeling supported by court advocates through the court process.	All clients going through the court process are asked to fill out a survey and responses are tracked.
Children's Services: 75% of non-offending parents will report that children receiving services exhibit less stressful behavior and	Provide services to children who live or have lived in homes with domestic violence to decrease their trauma and increase coping skills.	30 children and their non-offending parent participated in coping skills groups. 95% of non-offending parents reported that their children exhibited less stressful behavior and increased coping skills.	All non-offending parents of children receiving group services are asked to fill out a survey and responses are tracked.

increased coping skills.			

If program(s) did not meet its stated goal(s), please explain: All programs met or exceeded stated goals.

PROGRAM 2: SELF SUFFICIENCY PROGRAMS

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Legal Information: 85% of legal clinic or workshop participants will report that the session was helpful for their situation.	Volunteer attorneys conduct at least 8 legal clinics and workshops are offered throughout the year on a variety of family law topics.	Out of 49 participants in 10 workshops, 95% reported that the session was helpful for their situation. We also served 192 community members through our free legal information appointments with local attorneys.	Participants complete a confidential evaluation.
85% of clients who meet with a UNC-CH law student through the Community Legal Project will state that they received information helpful for their situation.	UNC-CH law students meet one-on-one with clients at agency location on topics related to family law and tenancy issues providing 60 appointment timeslots through this program.	Out of 31 participants, 100% reported that they received information helpful for their situation. 72 appointment timeslots were available and 32 clients came to both the initial and follow-up appointments with law students.	Participants complete an evaluation form after each session.
Individual financial counseling: 85% of people who attend individual financial counseling will report that they are leaving with at least one goal to improve	Staff and/or volunteer financial counselors will provide one-on-one counseling to target individual goals and tailor a plan of action for each client. We expect to serve 100 individuals.	Of the 86 clients served, 95% of participants reported that they left with at least one goal to improve their financial situation. Many clients attended more than one appointment with the financial counselor.	Participants complete an evaluation form after each counseling session or workshop.

their financial situation.			
Financial Coaching and Support Groups: 80% of clients will develop a plan to reduce debt and/or increase savings.	Clients will participate in the financial coaching and support program, an in-depth program which includes over 15 hours of workshops, individual coaching and group support. There will be two 8-week groups held and supportive follow-up to members.	Two 8-week groups were held with 18 participants, 100% of participants developed a plan to reduce debt and/or increase savings.	Participants complete pre- and post-tests, with evaluation of the use of basic financial practices.
Financial Education Workshops: 85% of participants will report they have learned at least one useful skill from the workshop.	Workshops will be offered on 10 occasions on various financial literacy topics.	There were 13 workshops offered with 118 participants in attendance (separate from financial coaching and support group workshops). 100% of participants reported that they are able to reduce debt or increase savings.	Participants complete pre- and post-tests which includes a self-report of monetary savings and/or debt reduction.
VITA (Volunteer Income Tax Assistance): Clients will complete and file a tax return during at least 85% of available appointments.	VITA volunteers will provide at least 150 VITA appointments at Compass Center's location.	Tax returns were completed in 89% of VITA appointments. A total of 235 clients were assisted in filing their taxes.	VITA staff will review appointment logs and compare them to the number of tax returns filed successfully.

If program(s) did not meet its stated goal(s), please explain: Program results were either met or exceeded for all goals except Individual Financial Counseling in which we served 86 clients instead of the proposed 100 clients. We had more clients than usual cancel or no-show to these appointments despite our efforts to make reminder phone calls, have evening appointments available, etc. We are exploring ways address this further.

PROGRAM 3: COMMUNITY EDUCATION AND CIVIC ENGAGEMENT

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Information and Referral: 85% of clients who call or walk in seeking information or referral assistance will report that they have received the information or the help they requested.	Assist at least 1,150 clients through Information and Referral Services.	923 clients were served. 96% reported that they received the information or help they needed.	Volunteers collect basic demographic and client satisfaction information at the end of each call or walk-in visit.
Civic Engagement of Volunteers: 15 First Response Volunteers will be recruited, trained, and supervised to provide information and referral services.	At least 15 volunteers will be trained to assist clients seeking help and resources in our community.	18 new First Response Volunteers were recruited, trained, became a routine volunteer and were supervised.	Staff will collect data on number of volunteers trained.
Civic Engagement: Women's History Month will be held in March 2014 with a theme and a series of activities	Women's History events will be selected based on the National Women's History Project theme.	Compass Center sent information about Women's History and the national theme to all county libraries, schools, bookstores, and a number of local businesses with ideas about how to celebrate Women's History month. We created a poster related to the theme and provided that to local businesses. We created a community calendar of events. Educational postings were placed on the agency website, blog, and facebook were used. We disseminated a quiz related to the theme and held several tabling events at local businesses for people to engage and learn more about women's history.	Staff and volunteer committee members debrief after the events(s) to determine success and ensure that plans for next year include necessary changes.

Artist Events: At least 2 artists and one author will increase their visibility through events.	One Author and Musician event will be held (An Evening of Story and Song with Lee Smith and Friends) *and Through Women's Eyes, By Women's Hands* art show will be held	An Evening of Story and Song was held in December 2013 with authors Lee Smith and Jill McCorkle and musicians Marshall Chapman and Matraca Berg with 230 people in attendance. *Through Women's Eyes, By Women's Hands* art exhibition was held in March 2014 engaging 262 artists, volunteers and community members. There were over 162 canvasses and 60 pieces of pottery and jewelry.	Staff and volunteer committee members debrief after events to determine success and ensure that plans for next year include necessary changes.
Media Literacy Workshops: At least 75% of participants will report that they will look at the media differently.	Offer at least 8 educational workshops for adolescents/parents through our media literacy program, M.A.G.I.C. (Media Analysis of Gender and Image Construction)	12 presentations of the M.A.G.I.C. curricula were conducted reaching 287 adolescents.	Evaluations will be completed by participants after presentations and results will be tabulated.
Shelter Services will be reviewed in partnership with local hoteliers for short-term housing required by victims of domestic violence.	Hoteliers will be contacted and engaged in this effort to ensure that clients who are victims of interpersonal violence will be able to use local hotels for short-term safety at no cost to the client.	We have 2 hoteliers who signed MOU's to provide free or low-cost rooms for victims.	Hoteliers will be contacted regarding collaboration and agreements for hotel rooms arranged.

If program(s) did not meet its stated goal(s), please explain: All programs met or exceeded stated goals except for having less clients use Information and Referral Services than originally anticipated. There are a few reasons for this: 1) as a result of our 2012 merger and greater publicity of the domestic violence hotline number we believe that more people are directly calling that line instead of going through Information and Referral Services and being referred to the hotline. This is much better for the client as it means only one call and one time sharing their challenges in order to get help. 2) Several of our self-sufficiency program staff began taking calls from clients directly to schedule appointments and these numbers were not included in Information and Referral contacts whereas usually they would have been. This change was made to benefit clients despite the fact that it reduced our Information and Referral numbers.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Crisis Intervention: 85% of clients who meet with crisis response staff will develop a safety plan that meets their needs and helps them feel that they have options to improve their safety.	Provide direct services to victims of domestic violence including crisis intervention, support groups, and advocacy in order to reduce trauma and increase clients' ability to make choices increasing their safety and that of their children.	Out of 650 clients, 85% of clients who meet with crisis response staff will discuss their safety and develop a safety plan that meets their needs and helps them feel that they have options to improve their safety.	All clients who meet in person with crisis response staff or attend support group are asked to fill out a survey and responses are tracked.
Court Advocacy: 85% of clients will report feeling supported by court advocates through the court process.	Provide court services to victims of domestic violence to reduce the trauma and confusion that clients experience in the court process.	Out of 125 clients, 85% of clients will report feeling supported by FVPC court advocates through the court process.	All clients going through the court process are asked to fill out a survey and responses are tracked
Adult Support Services: 85% of support group participants will report that they felt less alone in their experience of abuse following support group participation.	Provide support group services to adults who have experienced domestic violence to decrease their trauma and increase their feelings of support.	Out of 45 participants, 85% will report that they felt less alone in their experience of abuse.	All support group participants will be asked to complete an evaluation survey at the end of group. Responses are tabulated.
Crisis Intervention-Spanish Speakers: 85% of Spanish speaking victims of domestic violence will report that their needs were met and they better understand their options.	Provide direct services to Spanish speaking victims of domestic violence including crisis intervention and advocacy to reduce trauma and meet their needs as victims.	Out of 50 Spanish speaking victims, 80% will report that their needs were met and they better understand their options.	All Spanish speaking clients who meet in person crisis response staff are asked to fill out a survey and responses are tabulated.

PROGRAM 2: SELF SUFFICIENCY PROGRAMS

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Legal Information Services: 85% of legal program participants will report that the information presented was helpful for their situation.	Provide accessible, understandable, and respectful free or low-cost legal information to clients who cannot afford legal representation. Services include telephone appointments with attorneys, legal workshops, Family Law Book, and other resources.	Out of 30 legal workshop participants, 85% will report that the information presented was helpful for their situation.	Individuals who attend a legal workshop are asked to complete an evaluation. These results are compiled and analyzed by staff.
Legal Information Services: 85% of clients who meet with a UNC-CH law student through our Community Legal Project will state that they are more knowledgeable about their situation.	Provide accessible, understandable, and respectful free or low-cost legal information to clients who cannot afford legal representation. Services include in-person appointments with UNC Law Students.	Out of 50 clients meeting with UNC-CH law students, 85% will report that they are more knowledgeable about their situation.	Individuals who met with UNC-CH law students are asked to complete an evaluation. These results are compiled and analyzed by staff.
Financial Literacy Education: 85% of people who attend individual financial counseling will report that they are leaving with at least one goal to improve their financial situation.	Assist individuals and families to successfully manage their finances, reduce their debts, build assets and meet other short- and long-term financial goals. Provide individual sessions and group workshops on financial literacy education.	Out of 200 session participants, 85% will report that either they are leaving with one goal to improve their financial situation.	Participants complete an evaluation after each session or workshop. Information is tracked and collated.
Free Income Tax Preparation (VITA): Serve and file tax returns for 250 participants (including foreign students).	Provide free tax preparation services to low and moderate income individuals, helping them preserve as much income as possible through free tax preparation. Collaborate with RSVP to provide tax preparation services through the VITA program.	Compass Center will serve and file a tax return for 250 participants (including foreign students).	VITA staff will review appointment logs and compare them to the number of tax returns filed successfully.

Career Preparedness Program: 85% of people who attend individual career counseling will report that they are leaving the session with at least one item to do in their career search.	Provide career exploration and support in individual advising and workshop formats with staff and professional volunteers. Services include job search skills, help with resume and interviewing skills, advise on the job search process or help explore a career direction.	Out of 125 session participants, 85% will report that they are leaving with at least one item to do in their career search.	Participants complete an evaluation after each session or workshop. Information is tracked.

PROGRAM 3: COMMUNITY EDUCATION AND CIVIC ENGAGEMENT

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Information and Referral: At least 85% of clients who call or walk in seeking information or referral assistance will report that they have received the information or the help they requested.	Assist at least 750 clients through Information and Referral services utilizing trained First Response Volunteers.	Out of 750 clients, 85% will report that they have received the information or the help they requested.	Trained volunteers collect basic demographic and other satisfaction information about clients who receive Information and Referral Services at the end of each call or walk-in visit.
Civic Engagement: Women's History Month will be held in March 2015 and include educational events and information to provide community awareness.	Plan, Promote and carry out activities to acknowledge Women's History Month. The National Women's History Project offers a theme each year on which we may choose to focus. We will choose a theme to focus attention on the contributions of women or a challenge facing women in our community.	Activities and information will be disseminated to community members about Women's History Month	Staff and committee members debrief after the events and ensure that plans for next year include any necessary changes. Quantitative numbers of participants are collected and compiled.
Civic Engagement: Domestic Violence Awareness Month will be held in October 2014 with	Plan, Promote and carry out activities to educate the public during Domestic Violence Awareness Month	Activities and information will be disseminated to community members about Domestic Violence Awareness Month.	Staff and committee members debrief after the events and ensure that plans for next year include any necessary changes.

educational events, community-building activities and information disseminated for community awareness.		Over 23 events were held during DVAM in October 2014 including community presentations, a film showing, panel discussions, professional trainings, and awareness raising and educational activities.	Quantitative numbers of participants are collected and compiled.
Youth Education Programming: 85% of youth education event participants will report increased awareness of domestic violence and bullying and resources available.	Provide school-based dating violence and bullying prevention education to middle-school students in the 6th and 8th grade in CHCCS and various area private schools.	Out of 2000 education event participants, 85% will report an increased awareness of domestic violence and resources available.	Participants in youth dating violence prevention programming will be given pre-and post-test surveys and results compiled.
Professional Interpersonal Violence Training: 85% of service providers will report increased awareness of domestic violence and resources for victims.	Provide educational presentations to other community service providers about services and resources available for victims of domestic violence, the impact of domestic violence and reluctance of victims to disclose, the effect of domestic violence on children and other topics.	Out of 60 participants, 85% will report increased awareness about domestic violence and resources available to victims.	Participants in service provider community education presentations will be given a post-training evaluation survey and results compiled.
Community Interpersonal Violence Education: 85% of participants will report increased awareness of domestic violence and resources available for victims.	Provide community-wide education and information to groups through presentations on a variety of topics and participating in health fairs and other outreach efforts.	Out of 200 of participants, 85% will report an increased awareness of domestic violence and resources available.	Participants in community education presentations will be given a post-training evaluation survey and results compiled.

Section III. Program Information
Program Budget Worksheet
PROGRAM #1: DOMESTIC VIOLENCE CRISIS SERVICES

AGENCY NAME: The Women's Center, Inc. dba Compass Center for Women and Families

	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
PROGRAM REVENUE				
Private Donations	$ 29,251	$ 28,255	$ 32,575	15%
Program Generated Revenue (fees)	$ -	$ -	$ -	0
Local Government Grants:				
Orange County	$ 19,834	$ 21,500	$ 21,667	1%
Town of Chapel Hill	$ 9,668	$ 9,767	$ 9,833	1%
Town of Carrboro	$ 2,833	$ 2,800	$ 2,833	1%
Other Local: Town of Hillsborough	$ 668	$ 668	$ 668	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 18,459	$ 12,229	$ 9,250	-24%
State Government	$ 188,466	$ 192,163	$ 179,525	-7%
Federal Government	$ -	$ -	$ -	0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 10,908	$ 11,000	$ 11,000	0%
Please list 3 largest Miscellanous sources:				
Martha's Day Fundraiser $ 7,853.00				
Dom. Viol. Awrnss Fundraiser $ 3,055.00				
$ -				
Total Program Revenue	**$ 280,087**	**$ 278,382**	**$ 267,352**	**-4%**
PROGRAM EXPENSES				
Compensation	$ 211,587	$ 221,578	$ 218,258	-1%
Rent & Utilities	$ 29,852	$ 15,589	$ 8,900	-43%
Supplies & Equipment	$ 9,825	$ 9,768	$ 9,500	-3%
Travel & Training	$ 2,148	$ 2,258	$ 2,200	-3%
Other Expenses:	$ 26,352	$ 28,536	$ 28,500	0%
Please list 3 largest "Other Expenses":				
Communications/Telephone $ 6,352.00				
General Liability Insurance $ 2,628.00				
Professional Fees $ 2,528.00				
Total Program Expenses	**$ 279,764**	**$ 277,729**	**$ 267,358**	**-4%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 323**	**$ 653**	**$ (6)**	**-101%**

Section III. Program Information
Program Budget Worksheet
PROGRAM #2: SELF-SUFFICIENCY SERVICES

AGENCY NAME: The Women's Center, Inc. dba Compass Center for Women and Families

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 45,789	$ 49,152	$ 44,600	-9%
Program Generated Revenue (fees)	$ 1,122	$ 875	$ 875	0%
Local Government Grants:				
Orange County	$ 19,834	$ 21,500	$ 21,667	1%
Town of Chapel Hill	$ 9,668	$ 9,766	$ 9,833	1%
Town of Carrboro	$ 2,833	$ 2,800	$ 2,833	1%
Other Local: Town of Hillsborough	$ 667	$ 667	$ 667	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 30,249	$ 22,552	$ 18,249	-19%
State Government	$ 25,287	$ 19,000	$ 19,000	0%
Federal Government	$ -	$ -	$ -	0
Other Grants: MDC-CCAP-VITA	$ 1,896	$ 1,850	$ 1,850	0%
Other Grants:				0
Miscellaneous/Other Revenue	$ -	$ -	$ -	0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 137,345**	**$ 128,162**	**$ 119,575**	**-7%**
PROGRAM EXPENSES				
Compensation	$ 108,274	$ 101,257	$ 92,625	-9%
Rent & Utilities	$ 4,956	$ 5,028	$ 5,100	1%
Supplies & Equipment	$ 7,148	$ 7,150	$ 7,250	1%
Travel & Training	$ 1,255	$ 1,128	$ 1,100	-2%
Other Expenses:	$ 15,565	$ 13,589	$ 13,500	-1%
Please list 3 largest "Other Expenses":				
Communications/Telephone $ 6,352.00				
General Liability Insurance $ 2,628.00				
Printing & Copying $ 2,358.00				
Total Program Expenses	**$ 137,198**	**$ 128,152**	**$ 119,575**	**-7%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 147**	**$ 10**	**$ (0)**	**-103%**

Section III. Program Information
Program Budget Worksheet
PROGRAM #3: COMMUNITY EDUCATION & CIVIC ENGAGEMENT

AGENCY NAME: The Women's Center, Inc. dba Compass Center for Women and Families

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 33,522	$ 39,378	$ 40,625	3%
Program Generated Revenue (fees)	$ -	$ -	$ -	0
Local Government Grants:				
Orange County	$ 19,834	$ 21,500	$ 21,667	1%
Town of Chapel Hill	$ 9,668	$ 9,766	$ 9,833	1%
Town of Carrboro	$ 2,833	$ 2,800	$ 2,833	1%
Other Local: Town of Hillsborough	$ 665	$ 665	$ 665	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -	$ -	$ -	0
State Government	$ -	$ -	$ -	0
Federal Government	$ -	$ -	$ -	0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 25,000	$ 22,000	$ 22,000	0%
Please list 3 largest Miscellanous sources:				
Fundraising Events $ 22,000.00				
$ -				
$ -				
Total Program Revenue	**$ 91,522**	**$ 96,109**	**$ 97,624**	**2%**
PROGRAM EXPENSES				
Compensation	$ 72,488	$ 73,595	$ 75,000	2%
Rent & Utilities	$ 1,956	$ 1,985	$ 1,980	0%
Supplies & Equipment	$ 2,552	$ 7,150	$ 7,200	1%
Travel & Training	$ 1,043	$ 1,128	$ 1,150	2%
Other Expenses:	$ 13,451	$ 12,189	$ 12,294	1%
Please list 3 largest "Other Expenses":				
Temporary Contract Labor $ 4,750.00				
Printing & Copying $ 2,957.00				
Special Event Expenses $ 1,883.00				
Total Program Expenses	**$ 91,490**	**$ 96,047**	**$ 97,624**	**2%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 32**	**$ 62**	**$ (0)**	**-101%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

PROGRAM 1: DOMESTIC VIOLENCE CRISIS SERVICES

Define one unit of service: Each discrete separate service provided to a client is counted individually based on 15 minute increments. Some of our clients may receive only one direct service but most receive more than one service during one in-person or phone contact. These may also occur over many days, weeks or even months. Services include: crisis counseling, assistance in completing a protective order, court accompaniment and advocacy, support group screenings and attendance, assistance locating emergency shelter, emergency financial or transportation assistance, emergency child care, 911 cell phone distribution for safety, information and referrals for DV victims and their families, CPS reports, interpretation, legal information, etc.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	18,872	18,872	$279,764	$14.82
Estimated FY14-15	18,872	18,872	$277,729	$14.72
Projected FY15-16	18,872	18,872	$267,358	$14.17

PROGRAM 2: SELF SUFFICIENCY PROGRAMS

Define one unit of service: Each discrete separate service provided to a client is counted individually based on 15 minute increments. Some of our clients may receive only one direct service or could return multiple times for services. These may also occur over many days, weeks or even months. Services include: individual legal information with a UNC Law Student, call with attorney, participant in a legal, financial, or career workshop, recipient of Family Law Book, support group, financial counseling; tax preparation; career advising.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	4,140	4,140	$137,198	$33.14
Estimated FY14-15	4,140	4,140	$128,152	$30.95
Projected FY15-16	3,576	3,576	$119,575	$33.49

PROGRAM 3: COMMUNITY EDUCATION AND CIVIC ENGAGEMENT

Define one unit of service: One recipient session of information or referral; one attendee at each Start Strong youth education session; one attendee at a professional domestic violence educational event; one attendee at a community education event; one "open" of an electronic newsletter that contains educational content, or one participant or attendee at a Women's History Month or Domestic Violence Awareness event. Individuals may participate in more than one community education or event during the year and would be counted.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	16,165	16,165	$91,490	$5.66
Estimated FY14-15	16,165	16,165	$96,047	$5.94
Projected FY15-16	16,165	16,165	$97,624	$6.03

Defining a Unit of Service+

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost++

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program 1: Domestic Violence Crisis Services

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**			
Male	66	65	65
Female	913	915	915
2. **Ethnicity**			
African-American	101	110	110
Caucasian	156	160	160
Hispanic	91	90	90
Other/Unknown	631	620	620
3. **Age**			
0-5 Years	3	2	2
6-18 Years	23	15	15
19-50 Years	161	165	165
51+ Years	35	35	35
Unknown	757	763	763

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16
4. **Geographic Location(s)**			
Durham City	----	----	-----
Durham County	39	40	40
Raleigh City	----	-----	-----
Wake County	25	25	25
Town of Chapel Hill	363	365	365
Town of Carrboro	97	100	100
Orange County	83	85	85
Other/Unknown	372	365	365
Per cent of clients at, or below, federal poverty level * We do not collect socio-economic status. However, more than 50% of our clients are eligible for Legal Aid or DSS assistance.	Estimate 70% low income or below FFPL	Estimate 70% low income or below FFPL	Estimate 70% low income or below FFPL
TOTAL # OF CLIENTS SERVED	979	980	980

PROGRAM BENEFICIARY DEMOGRAPHICS

Program 2: Self Sufficiency Programs

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender** **Unknown**	357	357	266
Male	123	123	123
Female	511	511	511
2. **Ethnicity**			
African-American	185	185	185
Caucasian	495	495	495
Hispanic	44	44	44
Other	267	267	176
3. **Age**			
0-5 Years			
6-18 Years	2	2	2
19-50 Years	503	503	503
51+ Years	311	311	311
Unknown	175	175	84

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16
4. **Geographic Location(s)**			
Durham City	-----	-----	-----
Durham County	78	78	50
Raleigh City	-----	------	-----
Wake County	55	55	40
Town of Chapel Hill	444	444	400
Town of Carrboro	211	211	211
Orange County	132	132	132
Other cities, Chatham, Unknown	71	71	67
Per cent of clients at, or below, federal poverty level	Estimate 40% low income or below FFPL	Estimate 40% low income or below FFPL	Estimate 40% low income or below FFPL
TOTAL # OF CLIENTS SERVED	991	991	900

PROGRAM BENEFICIARY DEMOGRAPHICS

Program 3: Community Education and Civic Engagement

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender** **Unknown**	16,165	16,165	16,165	4. **Geographic Location(s)**			
Male				Durham City			
Female				Durham County			
2. **Ethnicity**				Raleigh City			
African-American				Wake County			
Caucasian				Town of Chapel Hill			
Hispanic				Town of Carrboro			
Other / Unknown	16,165	16,165	16,165	Orange County			
3. **Age**				Primarily Chapel Hill, Carrboro, Orange county residents	16,165	16,165	16,165
0-5 Years				Per cent of clients at, or below, federal poverty level	Unknown	Unknown	Unknown
6-18 Years	2,957	2,957	2,957				
19-50 Years							
51+ Years							
Unknown	13,298	13,298	13,298	***TOTAL # OF CLIENTS SERVED***	16,165	16,165	16,165

Section VI.

Comparative Budget for Entire Agency
(Excel file)

Agencies must still send a copy of the MS Excel file with their electronic application, even if they choose to embed the Excel table, on this page. The MS Excel file can be found here.

1. Please complete a Comparative Budget Excel Form **for the entire agency.** This budget form is required, even if the figures match the Program Budget Form(s).

   SEE ATTACHED EXCEL WORKSHEET

2. If the agency's finances experienced significant changes that you would like to explain, please use the space below.

   Regarding Domestic Violence Crisis Services, we have seen a 28% increase in domestic violence clients served over the past two years while the size of our domestic violence staff has remained the same. For crime victims, our 2-year grant from the NC Governor's Crime Commission to serve Spanish speaking individuals is at its end as of June 2015. We have applied for another 2-year grant from the same source and are identifying other sources, but it is unclear at this point what funding we will receive. Additionally, we are predicting decreased funding from United Way of the Greater Triangle as they are changing their funding strategy and priorities and it is still unclear how our agency funding will be affected. Funding from the Governor's Crime Commission and United Way grants are the sole funding sources for our Latino Services program and fund an entire staff position.

   Regarding Self-Sufficiency programs, the NC legislature voted to discontinue the work-force development program serving Displaced Homemakers, individuals who are losing support from either spouses or public assistance. In previous years, the funding has dwindled from $65,000 to less than $20,000 and we have continued our Self-Sufficiency programs despite the primary loss in funding. Our VITA (Volunteer Income Tax Assistance) Program is also primarily funded by United Way and it is unclear at what level the program will be funded.

   Regarding Adolescent Programs (not funded through Orange County), we have received funding for 17 years from the Teen Pregnancy Prevention Institute through NC DHHS. We are applying for a 4-year block grant but have been told that there are many more agencies applying this year for a reduced amount of funds. These funds pay for our Teens Climb High program within the Chapel Hill-Carrboro School System and also funds 1.7 positions. We are hopeful that this funding source will continue but it is unclear at this point if we will receive continued funding.

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: The Women's Center, Inc. dba Compass Center for Women and Families

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 111,890	$ 105,000	$ 105,000	0%
Agency Generated Revenue (fees)	$ 1,545	$ 500	$ 500	0%
Local Government Grants:				
Orange County	$ 59,500	$ 64,500	$ 65,000	1%
Town of Chapel Hill	$ 29,000	$ 29,300	$ 29,500	1%
Town of Carrboro	$ 8,284	$ 8,400	$ 8,500	1%
Other Local: Town of Hillsborough	$ 2,000	$ 2,000	$ 2,000	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 53,357	$ 49,076	$ 36,050	-27%
State Government	$ 288,927	$ 282,852	$ 262,500	-7%
Federal Government	$ -	$ -	$ -	0
Other Grants: Private Foundations	$ 59,497	$ 55,000	$ 55,000	0%
Other Grants:				0
Miscellaneous/Other Revenue	$ 152,423	$ 105,000	$ 129,556	23%
Please list 3 largest Miscellanous sources:				
Art Show Event $ 57,304.42				
Other Fundraising Events $ 33,831.52				
CASH RESERVES/SAVINGS $ 24,556.00				
Total Agency Revenue	**$ 766,422**	**$ 701,628**	**$ 693,606**	**-1%**
AGENCY EXPENSES				
Compensation	$ 573,572	$ 569,748	$ 562,500	-1%
Rent & Utilities	$ 49,016	$ 25,200	$ 25,200	0%
Supplies & Equipment	$ 20,153	$ 16,500	$ 16,500	0%
Travel & Training	$ 5,303	$ 3,500	$ 3,500	0%
Other Expenses:	$ 90,905	$ 85,905	$ 85,905	0%
Please list 3 largest "Other Expenses":				
Contracted Services $ 50,167.62				
Telephone/Communications $ 16,830.41				
General Liability Insurance $ 6,658.72				
Total Agency Expenses	**$ 738,960**	**$ 700,853**	**$ 693,606**	**-1%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 27,462**	**$ 775**	**$ -**	**-100%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: The Women's Center, Inc. dba Compass Center for Women and Families

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director* (currently held by an Interim Executive Director)	1.0	15% (1) 15% (2) 15% (3)	$73,644.96	$58,900	$67,500	11.76%	R,H
Associate Director (concurrently serving as Interim Executive Director)	1.0	25% (1) 25% (2) 25% (3)	$53,082.56	$50,000	$51,000	8.89%	R,H
Director of Domestic Violence Crisis Services	1.0	100% (1)	$34,500.00	$36,720	$37,000	6.45%	R,H
Director of Court Advocacy and Community Response	1.0	100% (1)	$34,000.00	$34,680	$35,000	6.10%	R,H
Latino Victim Advocate and Community Outreach Coordinator	1.0	100% (1)	$34,000.00	$34,680	$35,000	6.10%	R,H
Director of Self-Sufficiency Programs	1.0	100% (2)	$28,093.80 (Should be $34,000 but shortage due to 60 day vacancy)	$34,000	$34,680	6.04%	R,H
Director of Education Programs	1.0	100% (3)	$32,144.92	$34,680	$35,000	6.10%	R,H
Director of Teens Climb High	1.0	0% (100% Prog but 0% w/ OC Funds)	$31,072.27 (Should be $33,000 but shortage due to 30 day vacancy)	$33,660	$34,000	5.93%	R,H
Director of Development	0.67	0%	$32,341.45	$26,000	$26,500	4.61%	R

Communications Coordinator	1.0	40% (3)	$18,797.50 (0.5 FTE)	$33,660 (1.0 FTE)	$34,200 (1.0 FTE)	5.96%	R, H
Support Group Coordinator	0.67	80% (1) 20% (3)	$23,090.50	$25,114	$23,554	4.11%	R
Director of Finance and Human Resources	1.0	15% (1) 15% (2) 15% (3)	$44,329.49	$43,667	$44,300	7.72%	R,H
Financial Education Coordinator (Temporary until 12.31.14 Position Combined w/ Dir. Of Self-Sufficiency Programs Effective 1-1-15)	0.0	0.53% (2)	$14,399.56 (0.53 FTE)	$9,357.00 (0.53 FTE six months only)	$0.00	0.00%	
VITA Coordinator	0.4	100% (2)	$5,538.41	$5,688	$5,710	1.0%	
Administrative Manager	0.53	15% (1) 15% (2) 15% (3)	$20,188.55	$23,500	$18,200	3.17%	R
Hotline Pay		100% (1)	$13,312	$13,312	$13,312	2.32%	
Fringe Benefits (FICA, Insurance, Taxes, etc)			$75,037.09	$77,246	$78,816	13.74%	
TOTAL	**12.27FTE**		**$567,573.06**	**$574,864**	**$573,772**	**100%**	
VOLUNTEER HOURS: MSW Interns, Apples Interns, Legal Intern, Board of Directors, Hotline, First Response, Interpreters, COE, Start Strong, Event Vol. and others	Volunteer FTE	33% (1) 33% (2) 33% (3)	8.0 FTE	8.0 FTE	8.0 FTE		

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Diaper Bank of North Carolina**

Street Address: 304 E. Trinity Ave, Durham, NC 27701

Mailing Address: 304 E. Trinity Ave, Durham, NC 27701

Website Address: www.ncdiaperbank.org

Executive Director: Michelle Old

Telephone: 919-886-8085 E-Mail: info@ncdiaperbank.org

Contact Person: Michelle Old

Telephone: 919-886-8085 E-Mail: info@ncdiaperbank.org

Fax: _____ Federal ID Number: 32-0401621

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$0	$4,166
Summary of intended use of funds: These funds will be used to supply diapers to low income children in need who live in Orange County and do not reside in the towns of Chapel Hill or Carrboro.		
Town of Chapel Hill	$2,000	$4,166
Summary of intended use of funds: These funds will be used to supply diapers to low income children in need who live in the Town of Chapel Hill.		
Town of Carrboro	$3,036	$4,166
Summary of intended use of funds: These funds will be used to supply diaper to low income children in need who live in the Town of Carrboro.		

_____ _____

Executive Director Board Chair

January 21, 2015 January 21, 2015

_____ _____

Date Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 1/10/2013

   b. Years in Operation: Two

   c. Mission or Vision Statement (if applicable):

The mission of the Diaper Bank of NC is:

- to ensure that families with babies and children living in poverty have an adequate supply of diapers;
- to raise community awareness that "basic human needs" include diapers and that these needs are not being met for children living in poverty;
- to advocate for policy reform so that diapers are included in the definition of and provision for the basic human needs of families;
- and to create a model that can be shared, replicated and adopted by other communities in NC.

   d. Brief History of Agency:

The Diaper Bank of NC formed when a group of committed individuals and agencies recognized the unmet diaper need in NC, and the nonexistent resources currently available to meet that need. Diaper need is defined by Raver, et al (2010) as having to reduce basic essentials such as food or utilities in order to afford enough diapers. Mothers living below the federal poverty level or in financial hardship, described as "having struggled in the past 12 months to meet essential expenses," were the most likely to report diaper need. Cloth diapers are not a solution for most of these families due to the high initial costs and lack of access to personal laundry facilities for washing diapers. Therefore, the focus of the Diaper Bank of NC, and many other diaper banks across the country, is providing sufficient supplies of disposable diapers to families in need.

Once the need for a local resource was recognized, efforts were made to form the Diaper Bank of North Carolina (DBNC). DBNC was incorporated on January 10, 2013. One of the first steps the Board and Staff made was to facilitate an Advisory Board Meeting, which consisted of organizations and professionals across Durham and Orange Counties who met to conduct a needs assessment and share advice and guidance for forming a bank in the community. The Diaper Bank's first distribution was June 14, 2013 with the goal of covering 50,000 bottoms in a year. Far exceeding this goal, in the first year of service 209,000 diapers were distributed to families in Durham and Orange Counties.

The Diaper Bank distributes disposable diapers and other diapering supplies such as wipes and ointment through partner agencies that are delivering direct services to families in our

communities. Partner agencies are able to place an order each week based on the current needs of their clients to make sure that the correct size and quantity of diapers is provided for each family. It is important to DBNC that there are as few barriers as possible between diapers and the children who need them, so walk-in services are available through some partners (Urban Ministries of Durham, and Welcome Baby) in order to serve clients who may not be receiving direct services from any of the partner agencies that require previous enrollment. These walk-in programs receiver 55% of our distributed diapers.

To date, DBNC has been a chiefly volunteer organization operating out of donated space. In-kind diaper donations have been an essential part of the Bank's success with diaper donations valued at more than $125,000. As the Bank's services have grown quickly and become well known in the community, demand has increased steadily and begun to outpace the capacity of the volunteer workforce and the heavy reliance on in-kind donations. The Diaper Bank enters 2015 with a great need to professionalize its organizational structure to include: paid staff and the financial capacity to buy diapers by the truckload in order to address the identified need in the community.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Most of us do not spend a lot of time thinking about diapers. But if you are a parent, grandparent, or caregiver without enough of them, they can become a major source of stress, guilt, and desperation. Public safety net programs such as The Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) and Supplemental Nutrition Assistance Program (SNAP) do not cover the purchase of diapers, often leaving families with a difficult decision between buying diapers and other necessities with their limited funds. For families in need, something as small as a diaper can have a significant impact.

Poverty among North Carolina parents has persisted despite the national economic recovery, with Orange County, Chapel Hill and Carrboro as no exception. Orange County Health Department reported over 4,500 children living in poverty, an increase of over 7.4% in 3 years. Specifically within Chapel Hill and Carrboro, the Chapel Hill-Carrboro Chamber of Commerce reported the percentage of "economically disadvantaged" children is at 26.5 percent—the highest since 2006. Many of these children are likely to be diaper users without access to an adequate supply of clean, dry diapers. There is currently no other agency working in Orange County dedicated to addressing the problem of diaper need for these thousands of children living in poverty, making the Diaper Bank of NC a unique service to the community. The Bank receives regular requests for diapers from direct service agencies in Orange County, but due to funding limitations has only been able to respond in a limited capacity through it's partners El Centro Hispano Carrboro – Chapel Hill and The Compass Center for Women and Families.

Diaper need is a significant public health concern. A parent may be forced to leave her baby in the same diaper for the entire day – or longer – which can lead to severe diaper rash, urinary tract infections, and skin infections. Most day care facilities require a full day's supply of diapers. If

parents cannot provide them, their children cannot attend. According to Raver, et al. (2012), 22 percent of mothers reported missing work or other commitments because lack of diapers forced them to stay home with a child. Since attendance at work or training is mandated by North Carolina's Work First program under Temporary Aid to Needy Families (TANF), parents unable to leave their child at day care are in jeopardy of losing financial support (NC Department of Health and Human Services, 2009).

A recent study published in the journal *Pediatrics* found that 30% of mothers interviewed experienced times when they could not afford to buy the diapers they needed. The study also found that mothers who cannot afford adequate diapers for their children report higher instances of extreme stress or depression, which leads to negative outcomes for their children, potentially even neglect and abuse. By providing reliable access to adequate diapers, the Diaper Bank of NC will help low-income families in Orange County and its municipalities avoid these negative health, emotional, and child welfare outcomes.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

In the past year, the Diaper Bank of NC has established a presence in Chapel Hill and Carrboro, partnering with El Centro Hispano of Carrboro-- Chapel Hill and the Compass Center for Women and Families to distribute diapers to families in need. Our plan is to expand service in Orange County and the Towns of Carrboro and Chapel Hill, adding partner agencies to serve more of the community and adding programs where families can walk-in and access diapers without being enrolled with a program. However, we must ensure a stable supply of diapers in order to offer sustained support to these partners.

Recently, our affiliate partnership with the National Diaper Bank Network along with support from Huggies®, a Kimberly-Clark company, has provided the opportunity for us to purchase a truckload of over 200,000 diapers at a greatly reduced cost. Through this arrangement, DBNC can receive $90,000 worth of diapers for the shipping cost of $6,000.

The requested support of $3,500 toward the cost of a truckload of diapers would provide us with a substantial supply of diapers to support additional partnerships with Orange County agencies. With the help and support of Orange County and municipalities, over 100,000 diapers could be distributed to Orange County families.

In support of this significant growth and expansion, the Diaper Bank of NC will further professionalize its organizational structure by providing a living wage salary for the current executive director, Michelle Old, who has been donating her time on a 1.0FTE basis since the establishment of the Bank in January 2013. Old currently receives a token stipend of $1,000 per month. With the goal of providing a living wage for the executive director, DBNC is requesting $9,000 to supplement the existing stipend and more fully support this position. The executive director will continue to oversee outreach, program development, and sustainability of the organization on a statewide level.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

Internal:

- Individual donations (ongoing- expand in Orange County as services are extended to those communities).
- Sustainers program (ongoing- adopt a child)
- Participation in Great Human Race fundraising event (ongoing)
- Truckload of Hope Campaign (ongoing)

External:

- Duke "Doing Good in the Neighborhood" Grant (ongoing)
- Orange County, Town of Chapel Hill, &/or Town of Carrboro Outside Agency Funding Grant (Chapel Hill & Carrboro, ongoing. Orange County, new)
- Chapel Hill Service League Grant (new)

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- Orange County/Town of Chapel Hill/ Town of Carrboro- specific agencies with whom the Diaper Bank currently partners include:
  - El Centro Hispano Carrboro – Chapel Hill
  - Compass Center for Women and Families
  - We are in the beginning stages of partnering with Early Head Start Home Visiting program in Orange County to serve the most possible children in need.

- The goal of the 2015-2016 expansion in Orange County hopes to include:
  - HomeStart, Residential Facility for Homeless Women and Children
  - Inter-Faith Council for Social Service (IFC)

- Durham-specific agencies with whom the Diaper Bank currently partners include:
  - Urban Ministries of Durham
  - Welcome Baby Durham
  - Healthy Families Durham
  - Duke Family Medicine & Duke Outpatient Clinic
  - Duke Family Care Program
  - Duke Interfaith Hospitality Network
  - Durham First in Families
  - Genesis Home
  - Church World Service
  - Durham Connects

- Early Head Start
- Durham County Health Dept.

- Greater Triad- specific agencies with whom the Diaper Bank currently partners include:

  - **Davie County**
    Davie Pregnancy Care Center
    A Storehouse for Jesus

    Forsyth County
    Birthright of Winston-Salem
    Clemmons Food Pantry
    Lewisville Community Assistance Program

    Guilford County
    YWCA of High Point
    Welfare Reform Liaison Project
    Room at the Inn

    Randolph County
    Randolph County Health Department

    Stokes County
    Stokes County Health Department
    Hope Pregnancy Care Program

    Surry County
    Surry County Health and Nutrition Center
    Foothills Food Pantry

    Yadkin County
    Yadkin Christian Ministries

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

The Diaper Bank of NC intends to provide all communications and educational materials in both English and Spanish. The board of directors includes members of different races, ethnic groups and genders and strives to consider the needs and special circumstances of all members of the community in the design of programs and policies.

The Diaper Bank plans to recruit diverse volunteers and aim to have “Diaper Drop Hot Spots” in many geographic locations across the county, not just in the major municipalities. (Diaper Drop Hot Spots are strategically placed diaper donation bins in public places around the community such as libraries, stores, places of worship, schools and daycare centers, etc.)

7. Place an “X” in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition	x			X
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
DISTRIBUTE 100K DIAPERS TO CHILDREN IN NEED IN ORANGE COUNTY	ESTABLISH RELATIONSHIPS WITH 4 GEOGRAPHICALLY DIVERSE DIRECT SERVICE AGENCIES IN ORANGE COUNTY FOR DIAPER DISTRIBUTION TO TARGET POPULATION	ESTABLISHED 2 PARTNERSHIPS, EL CENTRO HISPANO AND THE COMPASS CENTER. WILL PARTNER WITH EARLY HEAD START 2015	
INCREASE AWARENESS OF THE DIAPER BANK AND PROMOTE INKIND DIAPER DONATIONS	IMPLEMENT NEIGHBORHOOD DIAEPR AMBASSADOR SYSTEM		
ESTABLISH PHYSICAL OPERATIONS IN ORANGE COUNTY	SECURE DONATED SPACE & /OR RENTED SPACE FOR RECEIPT, STORAGE, PROCESSING AND DISTRIBUTION OF DIAPERS IDENTIFY AND SECURE 6 DIAPER HOTSPOTS IN DIVERSE GEOGRAPHIC SETTINGS AROUND THE COUNTY AND TOWNS	WE HAVE IDENTIFIED 4 HOTSPOT LOCATIONS IN CHAPEL HILL AND CARRBORO THAT CURRENTLY COLLECT DIAPER DONATIONS FOR US.	
	IDENTIFY, TRAIN AND SUPPORT 8 NEIGHBORHOOD DIAPER AMBASSADORS IN ORANGE COUNTY		

If program(s) did not meet its stated goal(s), please explain:

Above we have evaluated what we will be accomplishing based on our stated goals for 2014/15. We did not have a grant in 2013/14. By the end of the 14/15 grant cycle we will be partnering with 3 family service agencies in Carrboro and Chapel Hill distributing at least two-three days worth of diapers and diapering supplies to 389 families which totals 10,000 diapers. We will not meet our goals stated when we applied for the 2014/15 grant because of lack of support and limited funds and resources.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
*PROVIDE 100K DIAPERS TO CHILDREN IN NEED IN ORANGE COUNTY, TOWN OF CHAPEL HILL AND TOWN OF CARRBORO	ESTABLISH RELATIONSHIPS WITH 1 ORANGE COUNTY DIRECT SERVICE ORGANIZATION THAT WILL ALLOW WALK-IN SERVICES	COLLABORATIVE RELATIONSHIPS WILL BE ESTABLISHED WITH 1 DIRECT SERVICE AGENCY AND DISTRIBUTION OF DIAPERS WILL BEGIN WITHIN THE FIRST QUARTER OF THE FISCAL YEAR	REVIEW QUANTITY AND DATE OF AGENCY AGREEEMENTS REVIEW DIAPER DISTRIBUTION RECORDS
INCREASE AWARENESS OF THE DIAPER BANK AND PROMOTE INKIND DIAPER DONATIONS	REACH OUT TO COMMUNITY PARTNERS, CIVIC CLUBS, AND CHURCHES TO PROMOTE DIAPER DRIVES AND VOLUNTEERISM.	WORK WITH COMMUNITY PARTNERS, CIVIC CLUBS AND CHURCHES TO ORGANIZE 10 DIAPER DRIVES COLLECTING 10,000 DIAPERS	REVIEW LIST OF COMMUNITY PARTNERS AND LIST OF DIAPER DRIVES, QUANTITY AND LOCATIONS.
EXPAND PHYSICAL OPERATIONS IN ORANGE COUNTY, CARRBORO AND CHAPEL HILL	IDENTIFY AND SECURE FIVE DIAPER DROP HOTS SPOTS IN DIVERSE GEOGRAPHIC SETTINGS AROUND THE COUNTY AND TOWNS	AGREEMENTS WITH OWNERS/MANAGERS OF HOST LOCATIONS FOR DIAPER DROP HOT SPOTS WILL BE REACHED DURING THE FIRST QUARTER OF THE FISCAL YEAR	DIAPER DROP HOT SPOTS WITH LOCATION AND DATA ON DIAPER COLLECTED EACH QUARTER
	*These are anticipated outcomes for 15/16 grant cycle.		

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: APER BANK OF NC (Orange County, Town of Chapel Hill and Town of Carrboro Progra

	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
PROGRAM REVENUE				
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County			$ 4,166	0
Town of Chapel Hill		$ 2,000	$ 4,166	108%
Town of Carrboro		$ 3,036	$ 4,166	37%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
Total Program Revenue	**$ -**	**$ 5,036**	**$ 12,498**	**148%**
PROGRAM EXPENSES				
Compensation		$ 4,036	$ 9,000	123%
Rent & Utilities				0
Supplies & Equipment		$ 1,000	$ 3,500	250%
Travel & Training				0
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Program Expenses	**$ -**	**$ 5,036**	**$ 12,500**	**148%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ (2)**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: One diaper distributed to a child in need in Orange County, Chapel Hill, or Carrboro

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14				
Estimated FY14-15	10,000	10,000	5,036	.50
Projected FY15-16	100,000	100,000	12,500	.12

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Diaper Bank of North Carolina

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male		129	1295	Durham City			
Female		242	2421	Durham County			
2. **Ethnicity**				Raleigh City			
African-American		96	959	Wake County			
Caucasian		74	743	Town of Chapel Hill		187	1871
Hispanic		189	1894	Town of Carrboro		129	1295
Other		12	120	Orange County		55	550
3. **Age**				Other (specify)			
0-5 Years		371	3716				
6-18 Years				Per cent of clients at, or below, federal poverty level		100%	100%
19-50 Years							
51+ Years						371	
Unknown				***TOTAL # OF CLIENTS SERVED***			3716

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Diaper Bank of North Carolina**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations		$ 7,000	$ 26,800	283%
Agency Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ -	$ -	$ 4,166	#VALUE!
Town of Chapel Hill	$ -	$ 2,000	$ 4,166	108%
Town of Carrboro		$ 3,056	$ 4,166	36%
Other Local: Chapel Hill Service League		$ -	$ 2,500	0
Other Local: GSK Ribbon of Hope		$ -	$ 10,000	0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Duke Doing Good ITN	$ 4,000	$ 5,000	$ 5,000	0%
Other Grants: NDBN		$ 2,000	$ -	-100%
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 4,000**	**$ 19,056**	**$ 56,798**	**198%**
AGENCY EXPENSES				
Compensation		$ 12,000	$ 27,000	125%
Rent & Utilities		$ 650	$ 3,000	362%
Supplies & Equipment		$ 2,000	$ 22,000	1000%
Travel & Training			$ 900	0
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Agency Expenses	**$ -**	**$ 14,650**	**$ 52,900**	**261%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 4,000**	**$ 4,406**	**$ 3,898**	**-12%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Diaper Bank of North Carolina

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	.50	.50	0	14,000	27,000	47%*	
Program Volunteers (1,800 hours)	.92	.50	0	0	0	0	
Marketing Professional (50 hours)	.08	.04	0	0	0	0	
* we are on a January – December year budget so our numbers and percentages will be different. On our yearly budget the % Total is actually less… 30%.							

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.

- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

References:

Raver, C., Letourneau, N., Scott, J., & D'Agostino, H. (2010). Huggies every little bottom study, diaper needs in the U.S. and Canada. *Commissioned by Huggies®, a Kimberly-Clark company.* Retrieved from http://www.huggies.com/assets/en-US/huggies-2010-every-little-bottom-study.PDF

Smith, M.V., Kruse, A., Weir, A. & Goldblum, J. (2013). Diaper need and its impact on child health. *Pediatrics*, originally published online July 29, 2013. doi: 10.1542/peds2013-0597

North Carolina Department of Health and Human Services. (2009). Temporary assistance for needy families state plan (P.L. 104-193): 18-19. Retrieved from http://www.ncdhhs.gov/dss/workfirst/docs/TANF%20State%20%20Plan%2010-09.pdf

Population and poverty data retrieved from http://www.city-data.com and Chapel Hill-Carrboro Chamber of Commerce

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: Duke University Health System, Inc. d/b/a Duke HomeCare & Hospice

Street Address: 4321 medical Park Drive, Suite, 101, Durham, NC 27704

Mailing Address: Same

Website Address: duch.duhs.duke.edu

Executive Director: Belle Starr Browning

Telephone: 919.620.3853 E-Mail: starr.browning@duke.edu

Contact Person: Dale Horton

Telephone: 919.479.0318 E-Mail: dale.horton@duke.edu

Fax: 919.668.0727 Federal ID Number: 56-2070036

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$1,000.00	$1,200.00
Summary of intended use of funds: Duke Hospice provides palliative care for terminally ill patients regardless of ability to pay. The Unicorn Bereavement Center provides bereavement support for hospice family members following a death. The bereavement center also responds to community need by offering support to the Orange County School System and individual, family and group support to individual's grieving a sudden death. The requested funds will support our mission to provide comprehensive hospice support to indigent residents of Orange County and to support our bereavement outreach to Orange County residents.		
Town of Chapel Hill	$3,200.00	$3,500.00
Summary of intended use of funds: Duke Hospice provides palliative care for terminally ill patients regardless of ability to pay. The Unicorn Bereavement Center provides bereavement support for hospice family members following a death. The bereavement center also partners with local schools and organizations to provide grief support to residents of Chapel Hill and students served by the Chapel Hill Carrboro School System.		
Town of Carrboro	$3,600.00	$4,000.00
Summary of intended use of funds: : Duke Hospice provides palliative care for terminally ill patients regardless of ability to pay. The Unicorn Bereavement Center provides bereavement support for hospice family members following a death. The bereavement center also partners with local schools and organizations to provide grief support to residents of Chapel Hill and students served by the Chapel Hill Carrboro School System.		

Executive Director

Board Chair

1-21-15

Date

1-22-15

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:

   1979

   b. Years in Operation:

   36

   c. Mission or Vision Statement (if applicable):

   The mission of the Duke Hospice Bereavement Services (DHBS) is to facilitate a safe and healing grief process for persons who are adjusting to a loss due to death. It is a direct clinical service outreach into the community for Duke HomeCare & Hospice.

   d. Brief History of Agency:

   Now in its 36th year, Duke Hospice (formally Triangle Hospice) was founded by a group of volunteers in 1979. During this span, it became one of the largest and foremost providers of hospice care in North Carolina. During the early 1990's these volunteers, led by former governor, the late Terry Sanford, raised $2 million to build a 6-bed Inpatient Care Facility in the Meadowlands in Hillsborough, which provides 24-hour care for those hospice patients in psychosocial crisis, unmanageable pain and/or need for respite care. In 1995, with a gift from GlaxoWellcome, the Beard House, which is on the same 11-acre site, was transformed into the Unicorn Bereavement Center. Staffed with two full-time bereavement counselors and one part-time bereavement counselor, the UBC serves both hospice families and those in the community who have lost a loved one. Each year, more than nine multi-week support groups and workshops are held at the UBC. We provide medical, psychosocial, spiritual and bereavement care for terminally ill patients and families, regardless of ability to pay. Bereavement services are provided to anyone in the community, regardless of connection to hospice, through individual, family, and group sessions, as well as in the Chapel Hill-Carrboro and Orange County School Systems.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Duke Hospice will continue to provide comprehensive hospice services delivering quality care for all terminally ill patients within the community regardless of ability to pay. These funds will be used to support the delivery of services to indigent members of the Chapel Hill/Carrboro/Orange County community. Bereavement services will be provided to any individual in these communities as a demonstration of our on-going commitment to provide grief support and education to all who request that support.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

None are being considered at this time.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

a. Generate gifts and contributions from individual clients and support group participants;
b. Generate revenue through professional training and community outreach; and
c. Professional presentations to market expertise in grief support and generate additional revenue.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

Duke Hospice partners with local agencies like OCIM, the Chapel Hill-Carrboro and Orange County School Systems, Triangle Consortium for Suicide Prevention, Perinatal Loss Education Consortium, A Helping Hand and other local non-profit organizations to meet the unmet needs of patients with limited resources. In addition, Duke Hospice solicits donations through civic and faith-based organizations to provide for clothing, housing and food for needy patients and families. The licensed clinical social workers employed by Duke Hospice refer patients and families to appropriate non-profit and government agencies for the proper assistance.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Duke Hospice has a speakers' bureau program which provides speakers to the community at no charge, including underserved and diverse ethnic populations. Additionally, Duke Hospice has previously received funding to provide end-of-life education to the Latino community. Interpreter services are available through Duke Health System to assist in the delivery of care to non-English speaking clients.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X	X	X
Health and Nutrition				
Job Training	X	X	X	X
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring	X	X	X	X
Transportation				
Housing				
Other (grief counseling)	X	X	X	X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Provide Indigent Services / Bereavement Services	Duke Hospice provides care to terminally ill patients and their families. We do this through an interdisciplinary team of hospice nurse clinicians, clinical social workers, nursing assistants, chaplains, volunteers and a medical director who all work with a patient's primary care physicians and bereavement counselors. Hospice care focuses on pain and symptom management, or palliative care, rather than curative care. Our goal is to make the last months of life as productive and comfortable as possible for both patients and their families. We are a resource to the community on issues of death, dying and bereavement. Our clients come from all walks of life. Some come with adequate insurance and funds to pay and others are on Medicare, Medicaid, or uninsured. We provide services to all regardless of ability to pay. To do so, we must continue to rely on the philanthropic generosity of those individuals, municipalities, foundations and corporations who support our mission.	In fiscal 2013-2014, we served 1,194 patients patents and their families through our Hospice program, offered new four-week support groups, offered Camp ReLEAF (an overnight bereavement camp for young people adjusting to the death of a significant person in their lives), provided youth and adult Holiday Hurt workshops in addition to other individual and group bereavement services. We also provide on-site (school based) support by facilitating grief support groups to students. Our goal is to ensure that all terminally ill patients in our service area have access to hospice care, regardless of ability to pay. We will also ensure that bereavement services are available to every member of our community.	We will measure the number of people receiving hospice and/or bereavement services in Orange County and will measure quality through monthly Perception of Care surveys.

If program(s) did not meet its stated goal(s), please explain:

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	*Counselor meets with students, as the first contact, for students referred for minor infractions.*	*Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)*	*School records were checked to verify that students had not been suspended.*

Section III
Agency Program Budget

AGENCY NAME: Duke HomeCare & Hospice

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 433,276	$ 527,600	$ 537,700	2%
Agency Generated Revenue (fees)	$ 8,287,186	$ 10,197,372	$ 10,401,319	2%
Local Government Grants:				
Orange County	$ 1,000	$ 1,000	$ 1,200	20%
Town of Chapel Hill	3,500	3,000	3,200	7%
Town of Carrboro	3,400	3,400	3,600	6%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 8,728,362**	**$ 10,732,372**	**$ 10,947,019**	**2%**
AGENCY EXPENSES				
Compensation	$ 4,776,215	$ 5,047,878	$ 5,148,836	2%
Rent & Utilities	$ 114,753	$ 111,103	$ 113,326	2%
Supplies & Equipment	$ 943,171	$ 958,968	$ 978,148	2%
Travel & Training	$ 134,668	$ 149,000	$ 151,980	2%
Other Expenses:	4,181,567	4,117,230	4,199,574	2%
Please list 3 largest "Other Expenses":				
Administrative Overhead $ 2,239,275				
Professional Fees 909,231				
Bereavement 102,957				
Total Agency Expenses	**$ 10,150,374**	**$ 10,384,180**	**$ 10,591,863**	**2%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (1,422,012)**	**$ 348,192**	**$ 355,156**	**2%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]:

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	41,412	41,412	$10,150,374	$245.11
Estimated FY14-15	54,276	54,276	$10,384,180	$191.14
Projected FY15-16	55,362	55,362	$10,591,863	$191.32

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	34	56	57	Durham City	0	0	0
Female	55	66	67	Durham County	4	6	6
2. **Ethnicity**				Raleigh City	0	0	0
African-American	7	10	11	Wake County	0	0	0
Caucasian	62	92	94	Town of Chapel Hill	38	48	49
Hispanic	2	2	3	Town of Carrboro	6	8	9
Other	18	18	19	Orange County	41	100	102
3. **Age**				Other (specify)			
0-5 Years	0	0	0				
6-18 Years	0	0	0	Per cent of clients at, or below, federal poverty level	11.2%	14.52	
19-50 Years	0	2	2				
51+ Years	89	160	163		89	162	165
Unknown	0	0	0	***TOTAL # OF CLIENTS SERVED***			

Section VI
Comparative Budget for Entire Agency

AGENCY NAME: Duke HomeCare & Hospice

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 433,276	$ 527,600	$ 537,700	2%
Agency Generated Revenue (fees)	$ 8,287,186	$ 10,197,372	$ 10,401,319	2%
Local Government Grants:				
Orange County	$ 1,000	$ 1,000	$ 1,200	20%
Town of Chapel Hill	3,500	3,000	3,200	7%
Town of Carrboro	3,400	3,400	3,600	6%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 8,728,362**	**$ 10,732,372**	**$ 10,947,019**	**2%**
AGENCY EXPENSES				
Compensation	$ 4,776,215	$ 5,047,878	$ 5,148,836	2%
Rent & Utilities	$ 114,753	$ 111,103	$ 113,326	2%
Supplies & Equipment	$ 943,171	$ 958,968	$ 978,148	2%
Travel & Training	$ 134,668	$ 149,000	$ 151,980	2%
Other Expenses:	4,181,567	4,117,230	4,199,574	2%
Please list 3 largest "Other Expenses":				
Administrative Overhead $ 2,239,275				
Professional Fees 909,231				
Bereavement 102,957				
Total Agency Expenses	**$ 10,150,374**	**$ 10,384,180**	**$ 10,591,863**	**2%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (1,422,012)**	**$ 348,192**	**$ 355,156**	**2%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Nursing Care Assistant	1.58		$66,558	$66,558	---		
LPN	.39		$20,280	$20,280	---		
Field Clinician (RN)	1.64		$124,640	$124,640	---		
Admin. Asst.	.13		$3,900	$3,900	---		

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: El Centro Hispano, Inc.

Street Address: 201 W. Weaver Street, Carrboro, NC 27510

Mailing Address: 600 East Main Street, Durham, NC 27701

Website Address: www.elcentronc.org

Executive Director: Pilar Rocha-Goldberg

Telephone: 919-687-4635 ext. 43 E-Mail: procha@elcentronc.org

Contact Person: Colleen Blue

Telephone: 919-923-1162 E-Mail: cblue@elcentronc.org

Fax: 919-687-0401 Federal ID Number: 56-2011661

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$20,000	$30,000
To support community programming and general overhead costs for El Centro Hispano in Carrboro/Chapel Hill to work with and empower the Orange County Latino community to create programs to build community strengths and skills through: (1) referral/resource services, translation/interpretation, employment services, legal consultations and mediation; (2) English for speakers of other languages (ESOL), literacy, and parenting support classes for adults; and early childhood education and bilingual tutoring for youth; and (3) a Workers' Center for day laborers and other workers in the area.		
Town of Chapel Hill	$13,000	$15,000
To support community programming and general overhead costs for El Centro Hispano in Carrboro/Chapel Hill to work with and empower the Chapel Hill Latino community to create programs to build community strengths and skills through: (1) referral/resource services, translation/interpretation, employment services, legal consultations and mediation; (2) English for speakers of other languages (ESOL), literacy, and parenting support classes for adults; and early childhood education and bilingual tutoring for youth; and (3) a Workers' Center for day laborers and other workers in the area.		
Town of Carrboro	$9,000	$9,500
To support community programming and general overhead costs for El Centro Hispano in Carrboro/Chapel Hill to work with and empower the Carrboro Latino community to create programs to build community strengths and skills through: (1) referral/resource services, translation/interpretation, employment services, legal consultations and mediation; (2) English for speakers of other languages (ESOL), literacy, and parenting support classes for adults; and early childhood education and bilingual tutoring for youth; and (3) a Workers' Center for day laborers and other workers in the area.		

Executive Director

01/23/15

Date

Board Chair

1/23/2015

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

    a. Date of Incorporation: August 20, 1996

    b. Years in Operation: 23 years in Durham County; 4 years in Carrboro/Chapel Hill, Orange County

    c. Mission or Vision Statement (if applicable):

El Centro Hispano, Inc. is a grassroots community-based organization dedicated to strengthening the Latino community and improving the quality of life of Latino residents in Carrboro, Chapel Hill, and the surrounding area. We accomplish our mission through education, service and community organizing as well as partnering with other organizations.

d. Brief History of Agency:

El Centro Hispano, Inc. (ECH) was founded in 1992 as the Latino Resource Center, a joint project of the Catholic and Episcopal churches, in Durham County. The organization's first projects were English as a Second Language classes, a women's support group, and summer enrichment camps for children. In 2000, ECH partnered with Self-Help Credit Union, the State Employees Credit Union and the NC Minority Support Center to open the first Latino Community Credit Union in North Carolina. The Latino Community Credit Union has grown to provide much needed financial services in many cities across the state.

In July 2010, ECH opened its first satellite office in Carrboro/Chapel Hill in Orange County at the request of Orange County leaders to fill the gap in services for the large Latino population in the area due to the closing of El Centro Latino, Inc., a private nonprofit organization not affiliated with ECH. With the support of local funders and community members, ECH has replicated and adapted many of our programs that have been most successful and needed in Durham County for the Orange County Latino population. ECH has also begun to work with local partners to embark on new initiatives specific for the local population, such as the development of a workers' center for day laborers and domestic workers at ECH set to launch in spring 2015. In January 2014, ECH relocated its Carrboro/Chapel Hill office to a new permanent location at 201 W. Weaver Street to be more centrally located for the population we serve. Currently, ECH-Carrboro staff offers the following programs:

- Community Organizing: Liaison with Carrboro Day Laborers; Outreach; Workers' Center Development.
- Education: English for Speakers of Other Languages (in collaboration with Orange County Literacy Council); Family Literacy; Tutoring; Child Enrichment; and Parenting Support.
- Health Education and Prevention: HIV/STD and Alcohol/Substance Abuse Prevention Education.
- Support Services: Direct Support and Emergency Services; Referrals; Employment Assistance; Legal Services; Tax Preparation; and Cultural Development.

ECH is the largest grassroots Latino organization in North Carolina with 10 staff members, 6 contracted employees, more than 600 dues-paying members, over 100 annual volunteers, and services provided to more than 10,000 individuals annually.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

From 2000 to 2010, the North Carolina Latino population grew by 111%, which is the sixth greatest Latino population growth in the country.[1] Similar to the State, the Orange County Latino population grew by 108.9% during the same time period. Latinos represent one of the largest minorities in Orange County at 8.3% of the population and substantial portions of Carrboro (13.8%), Chapel Hill (6.4%) and Hillsborough (6.6%).[2] The Latino population is very young, comprising a significant share of the state's school-aged population as well as future labor force and voting bloc. The median age of all NC Latinos is 23, and the median age of US-born NC Latinos is 9.[3]

Program 1: Support Services

The ECH Support Services Program addresses barriers to accessing services for the Orange Latino population, including language issues, low levels of education and job skills, poverty, workplace challenges, lack of healthcare access, fear of interacting with US officials and unfamiliarity with US education, health, government and economic systems. In Orange County, 49.8% of the Latino population lives below the poverty level, and Latinos are three times more likely to be poor than non-Latino whites.[4] Although nearly 90% of Latino children in North Carolina are U.S. citizens, they are more likely than the overall child population to live in poverty.[5] During the recent recession, Latino children have experienced the highest rates of poverty in North Carolina, as 42.3% of Latino children lived in poverty in 2009, compared to 36.6% of black children and 12.4% of white children. These percentages are expected to increase, and research suggests that children who are driven into poverty during a recession are three times more likely to live in poverty as adults.[6]

Additionally, wage theft, injuries, discrimination and harassment in the workplace remain prominent issues in the community. According to the NC Department of Labor's Wage and Hour Bureau, wage and hour complaints are more likely to occur in low-wage industries, in which Latino immigrants are overly represented, such as childcare, home healthcare, restaurants and construction. Forty-one percent of Latino immigrant workers in the South who responded to a 2009 Southern Poverty Law Center survey had experienced wage theft, and 80% had no idea how to contact government law enforcement agencies such as the Department of Labor. Furthermore, 77% of Latina women who completed the survey reported that sexual harassment was a major workplace problem. In the US, one–in-seven Latinos report that in the past year they

[1] US Census 2010
[2] Ibid.
[3] NC Governor's Office of Latino/Hispanic Affairs, 2011
[4] 2011 Orange County Health Assessment
[5] Action for Children NC, 2010
[6] Action for Children NC, 2011

have had trouble finding or keeping a job because of their ethnicity and one-in-ten Latinos say they have had trouble finding or keeping housing because they are Latino.[7]

Many Orange County Latino individuals also report not knowing where to go to access health care services or information.[8] Many lack healthcare access, as 65% percent of Latinos in North Carolina report having no health insurance, 29.1% report they could not see a doctor due to cost, and 64.5% report having no personal doctor.[9] Furthermore, many Latino community members report stress and fear regarding accessing governmental and healthcare resources due to recent anti-immigration laws and allegations of racial profiling.

Program 2: Education

The ECH Education Program addresses many of the educational needs among the Latino Community in Carrboro, Chapel Hill and Orange County. In North Carolina, 69.4% of foreign-born Spanish speakers older than age 5 have Limited English Proficiency (LEP). Thirty-one percent of NC Spanish-speaking households are linguistically isolated, meaning all persons ages 14 and over in the household are LEP, which is higher than other immigrant groups.[10]

In addition to limited English proficiency, many Latino immigrants have very low education levels as compared to the general population. In the U.S., 23.5% of all Latinos and 34% of foreign-born Latinos have less than a 9th grade education.[11] In Chapel Hill-Carrboro City Schools, only 66.2% of Latino youth graduated from high school in 4 years in 2010, as compared to 92.5% for white students.[12] Research shows that low literacy and education levels make it difficult to get a job, access resources, and assist with children's education or literacy development. Furthermore, low literacy levels in Spanish make it more difficult for native Spanish speakers to learn English. Developing English proficiency is an important pathway to improving employability and economic success in the United States for immigrant families.[13] Limited English language ability also obstructs access to public programs that benefit children's development.[14]

Many Orange County Latino families also face additional barriers to improving their education and economic situation as well as to raising healthy and academically successful children. In North Carolina, Latina women are at a higher risk than white women for unintended pregnancy and reporting physical violence during pregnancy. North Carolina's Latina formal maternal education level is among the lowest in the nation.[15] In North Carolina, only 25% of Latina mothers read to their children at least once a day in 2005, compared to more than 50% of mothers in the general state population.[16] Latino parents in North Carolina are more likely to report that their children have fair or poor health and have had no health insurance in the past year than White parents.[17]

Moreover, national evidence shows that Latinos are less likely than children of any other racial or ethnic group to be enrolled in an early childhood program or to receive early intervention

[7] 2008 National Survey of Latinos, Pew Hispanic Center
[8] 2011 Orange County Health Assessment
[9] NC State Center for Health Statistics, 2010
[10] Migration Policy Institute, 2010
[11] 2008 National Survey of Latinos, Pew Hispanic Center
[12] 2011 Orange County Health Assessment
[13] Annie E. Casey Foundation 2005
[14] Annie E. Casey Foundation 2014
[15] Action for Children NC, 2010
[16] Ibid.
[17] SCHS, 2010

services. In 2005-06, 27% of Latino four-year-olds lacked regular, non-parental arrangements for child care, compared with 18% of white preschoolers and 16% of black preschoolers.[18] Thus, many Latino children reach school age without having been exposed to developmentally appropriate preschool settings. Such preschool education engages children in activities that get them ready to learn; these activities are designed to build cognitive, social, and emotional skills. Lack of mastery of these important developmental steps makes it difficult for children to begin learning when they enter a formal kindergarten classroom. In 2008-09, a national evaluation found that more than 80% of Latino fourth graders were not reading proficiently, compared with 68% of all fourth graders.[19] By providing children with a developmentally appropriate preschool experience with certified Early Childhood Education Specialists, the ECH Education program helps to prepare children for success in kindergarten.

Program 3: Workers' Center

ECH is working with the Day Laborer Task Force in Carrboro-Chapel Hill to develop a Workers' Center to 1) provide a safe and comfortable space for workers of all races/ethnicities to seek work with dignity; 2) connect workers and employers; 3) empower workers to access local services, develop new employment skills, and learn about occupational safety and labor rights; 4) strengthen social relationships among community members by easing tensions with neighborhoods surrounding the current informal hiring location on Jones Ferry Road and Davie Road in Carrboro; and 5) improve the quality of life of low-wage workers and promote social equality and inclusive economic growth in Carrboro, Chapel Hill and surrounding areas in Orange County. Renovations of ECH's office in Carrboro/Chapel Hill necessary for the Workers' Center have been completed due to the fundraising and administrative efforts of ECH and the Task Force. The Task Force is planning a Grand Opening of the Workers' Center in April 2015 to begin serving workers.

As the largest grassroots Latino organization in North Carolina with 23 years of experience serving the Latino community, ECH understands the enormous need for a Workers' Center in the area to allow day laborers and other workers to obtain work with dignity. Moreover, ECH is in a strategic position to address the specific needs of day laborers, most of whom are Latino immigrants, in order to help improve their quality of life and build their economic infrastructure.

Between 1995 and 2005, the number of Hispanic/Latino workers in North Carolina increased 431%, which accounted for 35% of the state's total workforce.[20] By the end of 2005, three out of four Latinos residing in North Carolina were employed in construction, wholesale, manufacturing, and the retail industries.[21] An example of this growth, approximately 30 men have gathered daily at the corner of Jones Ferry Road and Davie Road in Carrboro for years in order to obtain work in the construction, landscaping, painting, housekeeping, food, moving and service industries. Although the informal day laborer hiring site (also known as "the corner") is located in Carrboro, the actual work takes place in Carrboro, Chapel Hill and other areas throughout Orange County and the Triangle.

The majority of the workers gathering at the Carrboro site are from Mexico, Guatemala, Honduras and El Salvador; however, a group of Caucasian and African American day laborers also frequent the site. There is no restroom available at the site, which has been identified as an

[18] Action for Children NC, 2010
[19] Ibid.
[20] Kasarda, J. D., & Johnson, J. H. (2006). *The Economic Impact of the Hispanic Population on the State of North Carolina*. Chapel Hill, NC: Frank Hawkins Kenan Institute of Private Enterprise.
[21] Ibid.

important need among both workers and neighborhood residents. In addition, neighbors and police have cited problems such as littering and public consumption of alcohol at the site, which led to a 2007 town ordinance prohibiting loitering at the site between 11 am and 5 am.

In a survey with six Latino workers from the site, five of the workers stated that they would like to take classes while waiting for work, including basic education, computers, English classes and GED classes. Nationally, the average educational attainment among day laborers is eight years.[22] In addition to educational needs, many day laborers from the site have reported wage theft (mentioned in Program 1), as there is no formal contract between employers and workers, and many workers do not know about their labor rights. In a national survey of 2,660 day laborers, one in five reported work-related injuries, and more than half of those injured did not receive medical care in the last year.[23] Other issues affecting day laborers that the ECH Workers' Center will address include lack of opportunities to access local resources and need for a collective voice.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Program 1: Support Services – No changes are being considered.
Program 2: Education – ECH will partner with Durham Technical Community College to offer additional English as a Second Language classes.
Program 3: Workers' Center – ECH will launch this program in spring 2015 at the ECH Carrboro/Chapel Hill office.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

Program 1: Support Services - ECH has received new external funding from the Z. Smith Reynolds Foundation for operational support for the Durham and Carrboro Offices, and new funding from Strowd Roses, Inc. for general support for the ECH Carrboro/Chapel Hill Office. In FY 2014-15, Orange County ABC Board provided new funding to ECH to provide alcohol and substance abuse education and referrals for at least 250 Orange County Latino adults and their families through general education and referrals and education and referrals for high-risk groups. Since opening in 2010, St. Thomas Moore Catholic Church has provided a monthly donation to ECH. ECH will reapply to Z Smith Reynolds Foundation in August 2015 to continue to receive funding after December 2015.

An ongoing internal revenue source for ECH-Carrboro Support Services includes membership fees for community members who choose to become a member, which includes $25 for an individual and $40 for a family. Community members do not need to become members of El Centro Hispano in order to receive services; however, as an ECH member, individuals receive a membership card with photo, have the right to vote for the Board of Directors, gain discounts at local partner businesses and support the Latino community. ECH has also increased fundraising and marketing efforts in Carrboro/Chapel Hill, including an event at TOPO Distillery which raised $4,000 in donations for ECH and ECH's first annual Latin American Festival at the Carrboro Town Commons attended by over 1,000 people.

[22] Valenzuela, A. (2006). Searching and Working: Day Labor and Violence. In R. Martinez and A. Valenzuela (Eds.), *Immigration and Crime: Ethnicity, Race, and Violence* (pp. 189-211). New York, NY: NYU Press.
[23] Ibid.

Program 2: Education – For the past four years, ECH has received funding from the Orange County Partnership for Young Children in collaboration with the Orange County Literacy Council (OCLC) to implement the Family Literacy Program (FLP) in our Carrboro office. The FLP consists of ESOL, parenting support classes and preschool experience. ECH and OCLC plan to reapply to the Orange County Partnership for Young Children for FY 2015-16. ECH is also planning to apply to other foundations, such as JCP cares, Wish You Well Foundation and Dorothea Haus Ross for preschool experience. Fundraising efforts mentioned above in Program 1 will also support ECH's Education Program.

Program 3: Workers' Center – With ongoing external funding from the Town of Carrboro, ECH has hired an outreach worker to work as a liaison between workers (day labor) of all races and ethnicities and including women and men; employers; neighbors; the Human Rights Center; El Centro Hispano; the Day Laborer Task Force; and Town departments to develop a well-structured Worker's Center and assist the workers in its operation. ECH has also received new funding from Hispanics In Philanthropy for 18 months to support a Lead Organizer to manage day-to-day operations of the Workers' Center and a consultant to develop the Workers' Center 1) marketing campaign, 2) policies and procedures, 3) identification and meetings with potential employers, and 4) community outreach plan. ECH will also apply to other potential funding sources, such as the Oak Foundation, for additional funding to help sustain the Lead Organizer position, rental space costs and classes. The Day Laborer Task Force has worked with ECH to host fundraising events at local churches, launch an on-line crowdfunding campaign, and obtain donations and discounts from local businesses to cover all costs related to the construction of the Workers' Center at the ECH Carrboro/Chapel Hill office. The Town of Carrboro also provided a one-time contribution to help pay for the construction efforts.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- ***Better Business Bureau –*** ECH refers community members for help processing claims for scams to BBB Spanish-speaking staff who visits ECH in Carrboro/Chapel Hill.
- ***Carrboro Farmer's Market*** - provides fliers to community members that they can exchange for a discount at the market to increase Latino consumers.
- ***Chapel Hill-Carrboro Chamber of Commerce:*** ECH is a member of the Chapel Hill-Carrboro Chamber of Commerce and participates with the Chamber in the Day Laborer Task Force.
- ***Compass Center:*** Accepts direct referrals from ECH to their Director of Latino Services for domestic violence situations.
- ***Community Church of Chapel Hill:*** Helps ECH distribute information about our programs and recruit volunteers. They also held a fundraising event at the church for the construction of the Workers Center at ECH.
- ***Day Laborer Task Force:*** ECH is very active in the Day Laborer Task force, which includes representatives from Orange County Justice United, the Chapel Hill/Carrboro Human Rights Center, St. Thomas Moore Catholic Church, Community Church of Chapel Hill, the Carrboro Police Department, the Town of Carrboro and Board of Aldermen, and the Chapel Hill-Carrboro Chamber of Commerce. ECH has hired an Outreach Worker with funds from the Town of Carrboro to work as a liaison between all of these groups and to help develop a Worker's Center for Carrboro Day Laborers and domestic workers.

- ***Deferred Action for Childhood Arrivals (DACA) and Deferred Action for Parental Accountability (DAPA):*** In December 2014, ECH held an informative session in collaboration with about DAPA with 42 community members in partnership with NC Immigrant Rights Project and utilizing a presentation provided by the National Council of La Raza. ECH refers community members interested in DACA and DAPA to lawyers that volunteer at ECH's monthly Legal Clinics.
- ***Durham Technical Community College:*** ECH is working with Durham Tech to create a special curriculum for the ESL classes for Day Laborers.
- ***ECH Legal Clinic:*** Four lawyers volunteer their time monthly to provide free consultations for the community about legal issues, including immigration, family issues, civil, criminal and traffic law.
- ***El Futuro, Inc.:*** Accepts referrals for mental health and substance abuse treatment from ECH.
- ***Head Start:*** ECH provides applications for Head Start to community members and invites Head Start staff to speak with parenting groups.
- ***Human Rights Center:*** Through the Carrboro Day Laborer Task Force, ECH partners with the Human Rights Center to develop initiatives for Carrboro day laborers. In addition, the Human Rights Center is using ECH's space to operate some of its community programs during its transition to a new location.
- ***Inter-Faith Council:*** Supports ECH's summer camp for children, provides food for ECH tutoring program participants and day laborers, and distributes ECH's program list to their clients.
- ***Kidzu:*** Worked with ECH's preschool experience participants to make mosaics for their new space.
- ***La Isla –*** ECH refers eligible tutoring participants to this organization that provides tutoring on Saturdays.
- ***Latin American Festival:*** On 6/7/2014, ECH organized its first annual Latin American Festival for Orange County that included food, arts/crafts, performances and kids' activities and was attended by over 1000 people at the Carrboro Town Commons. Compass Center, Planned Parenthood, Enroll America, Summit Church, Sustain Foundation, State Farm, an Immigration Lawyer, Orange County Human Services, Carrboro Police Department, Orange County Health Department, Scrap Exchange and Takiri Dance Academy participated in the event. The event also included cultural and children's activities. ECH is working with the Town of Carrboro to plan for the 2015 Latin American Festival.
- ***National Day Laborer Organizing Network (NDLON)*** – ECH is a member of NDLON which works to unify and strengthen member organizations to be more strategic and effective in their efforts to develop leadership, mobilize, and organize day laborers. In June 2014, ECH's President/CEO and outreach coordinator attended NDLON's National Conference for Worker Centers in Los Angeles, California to choose a Workers' Center model appropriate for ECH and the community. ECH's Outreach Coordinator has attended additional web and face-to-face trainings to receive technical assistance from NDLON for developing the Workers' Center.
- ***OKAY –*** supports ECH's summer camp through financial donations yearly.
- ***Orange County ABC Board –*** Funded ECH in FY 2014-15 to provide alcohol and substance abuse education and referrals for at least 250 Orange County Latino adults and their families through general education and referrals and education and referrals for high-risk groups. Since July 2014, ECH has recruited volunteers to help with this initiative and has participated in four community events to provide outreach to the community about alcohol and substance abuse prevention, including Project Connect, Amigas en Salud Health Fair, Family Night at Frank Porter Graham Elementary School, and ESL Family Outreach for parents of students in

Hillsborough. Moreover, ECH has met with Chapel Hill-Carrboro City Schools Outreach Specialist to facilitate workshops in 2015; contacted 5 churches in Chapel Hill and Hillsborough to have a table at a Latino event or after Spanish-language service; contacted two neighborhoods to conduct outreach; and partnered with Mothers Against Drunk Driving to provide additional resources including the right to use their training material.

- ***Orange County Court System*** – Refers individuals to complete community service hours at ECH, including approximately 2-3 people per month.
- ***Orange County Health Department:*** ECH participates in the Orange County Health Department Latino Health Coalition and will assist with the Health Department's Family Success Alliance initiative to improve children's chances for educational and economic opportunities by serving a defined geographic area (a zone) and its children with evidence-based programs, services, and supports from cradle to career.
- ***Orange County Housing Department*** – ECH refers community members for housing information to Orange County Housing Department.
- ***Orange County Justice United Coalition:*** ECH is a member of this Coalition which has formed a task force to address the needs of Latino day laborers in Carrboro.
- ***Orange County Third Sector Alliance:*** ECH is a member of this Alliance to learn about services provided to the Latino community by other nonprofits in Orange County.
- ***Orange Literacy:*** Provides ESOL at ECH-Carrboro and collaborates with ECH on the Family Literacy Program for Latino and Burmese families with children ages 0-5 (funded by the Orange County Partnership for Young Children).
- ***OWASA:*** Partnership to develop a video and new brochure for the Latino community and for those who can't read and write.
- ***Planned Parenthood:*** ECH referred community members interested in applying for the Affordable Care Act or participating in a bilingual youth group to Planned Parenthood.
- ***Piedmont Health:*** ECH referred community members interested in applying for the Affordable Care Act to Piedmont Health.
- ***Punto Latino Tax****:* Provides discounted tax preparation services in Spanish at ECH in Carrboro/Chapel Hill.
- ***St. Thomas Moore Catholic Church****:* Provides a monthly donation to ECH, and ECH participates in their yearly health fair.
- ***TABLE*** – Provides bags of food weekly to ECH tutoring participants.
- ***UNC-Chapel Hill:*** Students volunteer services at ECH-Carrboro including providing referrals and helping Latino community members complete employment application forms, and after school tutoring for students grades K-12. UNC Apples Program students are also volunteering at ECH this year. ECH has recently collaborated with a group of students from UNC Public Health to provide a series of workshops in health and safety to Day Laborers and to help develop an action plan for launching the Workers' Center.
- ***UNC Latino Health Clinic:*** Accepts referrals for health services and has provided labor and delivery classes in our Carrboro office.
- ***UNC LGBTQ Center:*** Volunteers assist with ECH's LGBTQ Support Group, Entre Amig@s, as well as program evaluation and advertising.
- ***UNC Legal Clinic:*** legal advice for community members, including day laborers.
- ***UNC School of Nursing*****:** ECH has an intern from the School of Nursing every year to assist with health programming.
- ***United Church of Chapel Hill:*** On November 7, 2013, ECH organized a forum about "Different Lifestyles" held at the United Church of Chapel Hill with 175 attendees, a panel of 6 Latinos of different sexual orientations and identities, the LGBT Center of Raleigh, and Spanish

and English language media. ECH continues to collaborate with this church on Latino LGBTQ issues.

- ***WCHL Radio Station:*** ECH's President/CEO has participated on various panel discussions about Latino immigrant issues and ECH's Carrboro/Chapel Hill office Coordinator received the "Hometown Hero" award for her hard work in the community.
- ***WCOM Radio Station*:** Every Friday an ECH Board Member, Miguel Rojas, delivers a radio program about issues affecting the Latino community.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

The mission of El Centro Hispano (ECH) is to strengthen the Hispanic/Latino community and improve the quality of life of Hispanic/Latino residents in Carrboro, Chapel Hill, and the surrounding area. ECH reaches out to the Latino community through traditional and nontraditional outreach in neighborhoods and community events, and through contacts with other service providers. Although the focus of ECH's services is on the Latino community, ECH is committed to the inclusion of all groups and celebrates diversity in all forms. We place a high value on the relationships we build with other racial and ethnic communities.

As such, staff advocates for the inclusion of the Latino community and non-Latino community in events such as the Latin American Festival. In addition, ECH builds bridges and provides support for other isolated populations, such as the LGBTQ community. ECH operates the only LGBTQ and transgender support groups for Latinos in the Triangle, including "Entre Amig@s" (Between Friends) and "Entre Nosotras" (Between Us), which provide a safe space for Latino LGBTQ members to meet, educate themselves and build community.

ECH Community and Education Specialists in Carrboro also provide services to African American, Asian and Caucasian individuals. As part of the Orange County Partnership for Young Children-funded Family Literacy Program with the Orange County Literacy Council, ECH is working with Burmese families on child literacy development and parenting support. In addition, ECH was recently funded by the Town of Carrboro to work as the liaison between workers (day labor) of all races and ethnicities and including women and men; employers; neighbors; the Human Rights Center; El Centro Hispano; the Day Laborer Task Force; and Town departments to develop a well-structured Worker's Center and assist the workers in its operation

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X		
Health and Nutrition		X		
Job Training		X		
Sports and Arts Activities	X	X		
Pre-School Activities	X			
After-School Activities	X			
Mentoring				
Transportation				

Housing		X		
Other	X	X		

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
1,200 Latino individuals from the Orange County, Chapel Hill and Carrboro area access local health and human services and resolve issues such as housing, international travel, and employment	ECH community specialists provide referral services, assistance with job applications, interpretation and translation as well as mediation services.	1,882 Individuals (no repeats) served through the Support Services Program; 2,500 additional individuals reached through neighborhood outreach and events; 600 referral sheets provided (above goal)	Sign-in Sheet; Activity Reports
100 appointments made for individuals with volunteer lawyers to address legal issues	Recruit volunteer lawyers; organize legal clinic schedules; make appointments; call to remind individuals about appointments	97 appointments were made (below goal)	Sign-in Sheet
90% of the individuals and families served by the different activities of the Support Services Program will increase their knowledge about community resources	Community members receive assistance from Community specialists. ECH volunteer calls community members to evaluate program.	98% (97 of 99 surveys) of individuals and families surveyed reported an increase in their knowledge about the community (above goal)	Phone surveys

50% of the individuals/families served by the different activities of the Service Program will connect with the appropriate person, organization or entity to resolve his/her need.	Community members receive assistance from Community specialists. ECH volunteer calls community members to evaluate program.	65% (64 of 99 surveys) of individuals and families surveyed connected with the appropriate person, organization or entity to resolve his/her need (above goal)	Phone surveys

If program(s) did not meet its stated goal(s), please explain: In FY 2013-14, El Centro Hispano (ECH) did not meet our goals for Legal Clinic appointments because we transitioned from our office in Carrboro Plaza to the Midway Business Center for two months, to our permanent location at 201 W. Weaver Street in Carrboro (previously occupied by the PTA Thrift Shop) on January 1, 2014. During these months of transition, ECH continued to offer its services to the public at Carrboro Plaza and the Midway Business Center; nevertheless, the community was adapting to these changes in location and less people accessed services during this time period. To help people learn about this transition, ECH implemented: (1) Outreach: Volunteers and staff reached 2,571 individuals, distributing referral lists to 600 people, and (2) the first annual Latin American Festival: On 6/7/2014, ECH organized agencies, food, arts/crafts, performances and kids' activities in Carrboro for over 1000 people.

Stated Program Goals	**Program Activities**	**Anticipated Results for FY 15-16**	**Evaluation Method**
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Provide 65 adults with 4 hours per week of education related to literacy and/or language skills through ESOL	Partner with Orange County Literacy Council to organize ESOL classes; promote classes in the community; hold registration and testing day for new students; begin classes.	18 adults participated in ESOL classes (below goal)	Attendance sheets

classes. This will be accomplished through collaboration with the Orange County Literacy Council.			
At least 50% of the individuals/families that participate in the ESOL classes will demonstrate increased English levels through pre-and post-tests.	Partner with Orange County Literacy Council to organize ESOL classes; promote classes in the community; hold registration and testing day for new students; begin classes.	61% of individuals/families increased English levels (above goal)	Pre and posttest
Provide parenting support classes to at least 20 parents using the Prevent Child Abuse North Carolina's Circle of Parents program model	Partner with Orange County Literacy Council to organize Family Literacy Program; promote classes in the community; hold registration day for new students; begin classes.	18 parents participated in parenting support classes (above goal)	Attendance Sheets
At least 80% of the Circle of Parents participants will report an increase in awareness of community resources since they began attending groups.	Implement Prevent Child Abuse NC survey	100% (14 of 14 students) of participants reported an increase in awareness of community resources (above goal)	Surveys
At least 80% of the Circle of Parents participants will report using the information gained from the group "often" or "very often"	Implement Prevent Child Abuse NC survey	88.9% (16 of 18 students) of participants reported using the information from the group "often" or "very often" (above goal)	Surveys

Provide developmentally appropriate preschool experience for at least 25 children.	Partner with Orange County Literacy Council to organize Family Literacy Program; promote classes in the community; hold registration day for new students; begin classes.	26 children participated in preschool experience (above goal)	Attendance Sheets
At least 70% of primary caregivers who make use of the Preschool Room at least 7 times will agree that their child has improved in at least one area of school readiness or that they felt more prepared for their child to start kindergarten as a result of their child's participation in the Preschool Room.	Partner with Orange County Literacy Council to organize Family Literacy Program; promote classes in the community; hold registration day for new students; begin classes.	100% (25 of 25 surveys) of primary caregivers agreed that their child had improved in at least one area of school readiness or were more prepared to start kindergarten (above goal)	Surveys
Provide 4 hours per week of homework tutoring to 30 children from grades K-12.	Recruit and train volunteers; promote the program in the community; organize tutoring session dates; begin sessions.	37 students participated in tutoring (above goal)	Attendance Sheets
At least 60% of participants of the tutoring program will improve math and/or language arts based on report cards.	Recruit and train volunteers; promote the program in the community; organize tutoring session dates; begin sessions; request report cards; survey parents	90% of participants improved in math (27 out of 30 participants) and 47% improved in English (14 out of 30 participants), according to parent reports (above goal)	Phone surveys/Parent report
To provide access to information about college and scholarship applications to at least 25 Latino youth and	Invite universities, colleges and scholarship programs; promote the event in the community; hold the event.	224 Latino individuals attended the Annual Education Fair (above goal)	Attendance Sheets

their families through an Annual Education Fair.			

If program(s) did not meet its stated goal(s), please explain: In FY 2013-14, El Centro Hispano (ECH) did not meet our goals for ESOL and parenting support classes because we transitioned from our office in Carrboro Plaza to the Midway Business Center for two months, to our permanent location at 201 W. Weaver Street in Carrboro (previously occupied by the PTA Thrift Shop) on January 1, 2014. During these months of transition, ECH was not able to offer additional ESOL classes, and implemented parenting and preschool classes in collaboration with the Orange County Literacy Council at Frank Porter Graham Elementary School. Nevertheless, the community was adapting to these changes in location and less people accessed services during this time period. To help people learn about this transition, ECH implemented: (1) Outreach: Volunteers and staff reached 2,571 individuals, distributing referral lists to 600 people, and (2) the first annual Latin American Festival: On 6/7/2014, ECH organized food, arts/crafts, performances and kids' activities in Carrboro for over 1000 people. In 2014-15, ECH is working with Durham Technical Community College to offer specialized ESOL classes to day laborers as part of the new Workers' Center.

B. FY 2015-16 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.
Program 1: Support Services

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
1,000 Latino individuals from the Orange County, Chapel Hill and Carrboro area access local health and human services and resolve issues such as housing,	ECH community specialists provide referral services, assistance with job applications, interpretation and translation as well as mediation services.	1,000 Latino individuals from the Orange County, Chapel Hill and Carrboro area access local health and human services and resolve issues such as housing, international travel, and employment	Sign-in Sheet

international travel, and employment			
Make appointments for 100 individuals with volunteer lawyers to address legal issues	Recruit volunteer lawyers; organize legal clinic schedules; make appointments; call to remind individuals about appointments	100 individuals receive legal appointments with volunteer lawyers to address legal issues	Sign-in Sheet
At least 90% of the individuals and families served by the different activities of the Support Services Program will increase their knowledge about community resources.	Community members receive assistance from Community specialists. ECH volunteer calls community members to evaluate program.	90% of the individuals and families served by the different activities of the Support Services Program increase their knowledge about community resources.	Phone Surveys
50% of the individuals/families served by the different activities of the Service Program will connect with the appropriate person, organization or entity to resolve his/her need.	Community members receive assistance from Community specialists. ECH volunteer calls community members to evaluate program.	50% of the individuals/families served by the different activities of the Service Program connect with the appropriate person, organization or entity to resolve his/her need.	Phone Surveys

Program 2: Education

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***

Provide 30 adults with literacy and/or language skills education through ESOL classes. This will be accomplished through collaboration with the Orange County Literacy Council.	Partner with Orange County Literacy Council to organize ESOL classes; promote classes in the community; hold registration and testing day for new students; begin classes.	30 adults participate in ESOL classes	Attendance sheets
At least 50% of the individuals/families that participate in the ESOL classes will demonstrate increased English levels through pre-and post-tests.	Partner with Orange County Literacy Council to organize ESOL classes; promote classes in the community; hold registration and testing day for new students; begin classes.	50% of individuals/families increase English levels	Pre and posttest
Provide parenting support classes to at least 18 parents using the Prevent Child Abuse North Carolina's Circle of Parents program model	Partner with Orange County Literacy Council to organize Family Literacy Program; promote classes in the community; hold registration day for new students; begin classes.	18 parents participate in parenting support classes	Attendance Sheets
At least 80% of the Circle of Parents participants will report an increase in awareness of community resources since they began attending groups.	Implement Prevent Child Abuse NC survey	80% of participants report an increase in awareness of community resources	Surveys
At least 80% of the Circle of Parents participants will report using the information gained from the group "often" or "very often"	Implement Prevent Child Abuse NC survey	80% of participants report using the information from the group "often" or "very often"	Surveys

by June 30, 2013.			
Provide developmentally appropriate preschool experience for at least 20 children.	Partner with Orange County Literacy Council to organize Family Literacy Program; promote classes in the community; hold registration day for new students; begin classes.	20 children participate in preschool experience	Attendance Sheets
At least 70% of primary caregivers who make use of the Preschool Room at least 7 times will agree that their child has improved in at least one area of school readiness or that they felt more prepared for their child to start kindergarten as a result of their child's participation in the Preschool Room.	Partner with Orange County Literacy Council to organize Family Literacy Program; promote classes in the community; hold registration day for new students; begin classes.	70% of primary caregivers agree that their child have improved in at least one area of school readiness or are more prepared to start kindergarten	Surveys
Provide 30 children from grades K-12 with homework tutoring.	Recruit and train volunteers; promote the program in the community; organize tutoring session dates; begin sessions.	30 students participate in tutoring	Attendance Sheets
At least 60% of participants of the tutoring program will improve math and/or language arts.	Recruit and train volunteers; promote the program in the community; organize tutoring session dates; begin sessions.	60% of participants improve in math and/or language arts	Report Cards

Program 3: Workers' Center

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Carrboro Day Laborers will no longer use the informal hiring site in Carrboro in order to obtain work.	ECH President/CEO and Community Specialist work with Carrboro Day Laborer Task Force and the National Day Laborer Organizing Network to establish and promote a Workers' Center in El Centro Hispano's new location in Carrboro, including developing procedures for connecting workers and employers and helping workers and employers to transition from the corner to ECH.	0 Carrboro Day Laborers will use the informal hiring site in Carrboro to obtain work. Out of 30 Day Laborers who regularly obtain work by waiting at the "corner" in Carrboro, at least 15 will begin using the ECH Workers' Center to obtain work.	Sign-in Sheets, Reports from Task Force
At least 50% of workers improve English levels; 80% of workers increase occupational safety, employment skills and/or labor rights knowledge	Partner with Orange County Literacy Council, the Mexican Consulate, UNC-Chapel Hill Volunteers, Durham Technical Community College, UNC Chapel Hill, Hispanic Contractors Association, and other agencies to provide classes for Carrboro Day Laborers.	15 workers participate in ESL classes; 50% improve English levels based on pre and posttest 15 workers participate in occupational safety, employment skills and labor rights workshops; 80% increase employment skills, knowledge of labor rights and occupational safety based on pre/posttest	Pre and posttest, exams and surveys
60% of the identified employers utilize ECH's Workers' Center to hire workers	Identify employers that hire day laborers and meet with them about the Workers' Center; implement marketing and outreach campaign to workers, employers and stakeholders; document worker and employer visits to Center, work obtained and employer satisfaction	10 employers identified and contacted about the ECH Workers' Center; 60% of identified employers (6 of 10) hire workers through ECH's Workers' Center	Sign-in sheets; surveys

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: El Centro Hispano, Inc.

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 10,102	$ 6,000	$ 6,000	0%
Program Generated Revenue (fees)	$ 2,562	$ 2,500	$ 2,500	0%
Local Government Grants:				
Orange County	$ 20,000	$ 20,000	$ 30,000	50%
Town of Chapel Hill	$ 16,000	$ 13,000	$ 15,000	15%
Town of Carrboro	$ 8,500	$ 9,000	$ 9,500	6%
Other Local: Town of Carrboro: Outreach	$ 28,638	$ 36,970	$ 36,970	0%
Other Local: Orange ABC Board	$ -	$ 10,000	$ 12,000	20%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way		$ -		0
State Government		$ -		0
Federal Government		$ -		0
Other Grants: Orange Literacy	$ 24,525	$ 22,079	$ 22,079	0%
Other Grants: Strowd Roses	$ -	$ 5,000	$ -	-100%
Other Grants: Hispanics In Philanthropy	$ -	$ -	$ 10,000	0
Other Grants: Z Smith Reynolds Foundation	$ -	$ 20,000	$ 20,000	0%
Other Grants: St.Thomas Moore Catholic Chur	$ 2,400	$ 3,800	$ 3,800	0%
Other Grants: Oak Foundation	$ -	$ -	$ 20,000	
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 112,727**	**$ 148,349**	**$ 187,849**	**27%**
PROGRAM EXPENSES				
Compensation	$ 69,381	$ 87,092	$ 126,592	45%
Rent & Utilities	$ 54,923	$ 44,847	$ 44,847	0%
Supplies & Equipment	$ 4,633	$ 11,184	$ 11,184	0%
Travel & Training	$ 211	$ 3,925	$ 3,925	0%
Other Expenses:	$ 904	$ 1,301	$ 1,301	0%
Please list 3 largest "Other Expenses":				
Dues & Subscriptions $ 408.00				
Banking & Processing Fees $ 496.10				
$ -				
Total Program Expenses	**$ 130,054**	**$ 148,349**	**$ 187,849**	**27%**

SURPLUS/(DEFICIT) FOR PERIOD:	**$ (17,327)**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

Program 1: SUPPORT SERVICES

1) **Define one unit of service**[+]: Individuals participating in the support services program.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	1882	1882	$51,522	$27
Estimated FY14-15	1000	1000	$49,968	$50
Projected FY15-16	1000	1000	$49,968	$50

Program 2: EDUCATION

Define one unit of service[+]: Individuals participating in ESOL, Circle of Parents, tutoring or preschool experience.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost[++] = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	99	99	$62,146	$628
Estimated FY14-15	98	98	$54,504	$556
Projected FY15-16	98	98	$54,504	$556

Program 3: WORKERS' CENTER

Define one unit of service[+]: Individuals attending ECH workers' center to seek work, hire workers, and/or attend classes (estimated costs for FY 14-15 are only for 4th quarter; program unit costs are estimated to be higher during start-up phase).

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost[++] = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	N/A	N/A	N/A	N/A
Estimated FY14-15	15	15	$31,578	$2,105
Projected FY15-16	40	40	$63,870	$1,597

2) Define one unit of service[+]:

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Support Services Program

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16
1. **Gender**			
Male	761	500	500
Female	1,116	500	500
Unknown	5	0	0
2. **Ethnicity**			
African-American	5	5	5
Caucasian	21	5	5
Hispanic	1,847	985	985
Other	4	5	5
Unknown	5	0	0
3. **Age**			
0-5 Years	0	0	0
6-18 Years	10	10	10
19-50 Years	1,862	980	980
51+ Years	10	10	10

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16
4. **Geographic Location(s)**			
Durham City	15	5	5
Durham County	55	5	5
Raleigh City	3	5	5
Wake County	3	5	5
Town of Chapel Hill	312	300	300
Town of Carrboro	259	300	300
Orange County	1,015	370	370
Other: Unknown	200	0	0
Other: Alamance County	11	5	5
Other: Forsyth (2); Duplin (1); Wilson (1); Lee (1); Johnston (3); Chatham (1)	9	5	5
Per cent of clients at, or below, federal poverty level	90%	90%	90%
TOTAL # OF CLIENTS SERVED	1,882	1000	1000

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Education Program

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	36	36	36	Durham City	0	0	0
Female	63	62	62	Durham County	0	0	0
2. **Ethnicity**				Raleigh City	0	0	0
African-American	0	0	0	Wake County	0	0	0
Caucasian	0	0	0	Town of Chapel Hill	52	54	54
Hispanic	95	94	94	Town of Carrboro	32	34	34
Other	4	4	4	Orange County	10	10	10
3. **Age**				Other (specify)	5	0	0
0-5 Years	27	25	25	Per cent of clients at, or below, federal poverty level	90%	90%	90%
6-18 Years	49	25	25				
19-50 Years	23	48	48	***TOTAL # OF CLIENTS SERVED***	99	98	98
51+ Years	0	0	0				
Unknown	0	0	0				

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Workers' Center

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	N/A	15	36	Durham City	N/A	0	0
Female		0	4	Durham County		0	0
2. **Ethnicity**				Raleigh City		0	0
African-American	N/A	0	2	Wake County		0	0
Caucasian		0	2	Town of Chapel Hill		0	10
Hispanic		15	35	Town of Carrboro		15	25
Other		0	1	Orange County		0	5
3. **Age**				Other (specify)			
0-5 Years	NA	0	0	Per cent of clients at, or below, federal poverty level		100%	75%
6-18 Years		0	0				
19-50 Years		15	35	***TOTAL # OF CLIENTS SERVED***		15	40
51+ Years		0	5				
Unknown		0	0				

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **El Centro Hispano, Inc.**

AGENCY REVENUE		Actual 2014-15	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations		$ 37,788	$ 17,000	$ 17,000	0%
Agency Generated Revenue (fees)		$ 216,566	$ 162,300	$ 162,300	0%
Local Government Grants:					
Orange County		$ 20,000	$ 20,000	$ 30,000	50%
Town of Chapel Hill		$ 16,000	$ 13,000	$ 15,000	15%
Town of Carrboro		$ 8,500	$ 9,000	$ 9,500	6%
Other Local:	Town of Carrboro: Outreach	$ 28,638	$ 36,970	$ 36,970	0%
Other Local:	Orange ABC Board	$ -	$ 10,000	$ 12,000	20%
Other Local:	Durham County	$ 29,421	$ 29,421	$ 29,421	0%
	Durham ABC Board	$ 20,000	$ 20,000	$ 20,000	0%
	If more than 3 sources, please provide a separate list.				
Non-Local Government Grants					
Triangle United Way		$ -	$ -		0
State Government		$ 91,488	$ 81,520	$ 80,000	-2%
Federal Government		$ -	$ -		0
Other Grants:	Duke University	$ 41,666	$ 23,971	$ 23,971	0%
Other Grants:	UNC-Chapel Hill	$ 18,205	$ 75,206	$ 75,206	0%
Other Grants:	Orange Literacy	$ 24,525	$ 22,079	$ 22,079	0%
Other Grants:	NC State Success Coach	$ 6,000	$ -	$ -	0
Other Grants:	Kiran	$ 16,850	$ -	$ -	0
Other Grants:	Advocates for Youth	$ -	$ 7,000	$ 7,000	0%
Other Grants:	Planned Parenthood	$ -	$ 7,000	$ -	-100%
Other Grants:	St. Thomas Moore Catholic Churc	$ 2,400	$ 3,800	$ 3,800	0%
Other Grants:	Durham's Partnership for Childr	$ 59,907	$ 59,907	$ 59,907	0%
Other Grants:	Hispanics In Philanthropy	$ 36,935	$ 30,395	$ 10,000	-67%
Other Grants:	AIDS United	$ 35,700	$ 23,707	$ 20,000	-16%
Other Grants:	Z Smith Reynolds	$ -	$ 50,000	$ 50,000	0%
Other Grants:	Strowd Roses, Inc.	$ -	$ 5,000	$ -	-100%
Other Grants:	Crape Myrtle Festival	$ 6,500	$ 4,426	$ 5,000	13%
Other Grants:	Triangle Community Foundatior	$ 18,264		$ -	0
Other Grants:	Mead Family Foundation	$ 20,000	$ -	$ -	0
Other Grants:	John Snow, Inc.	$ 4,651	$ -	$ -	0
Other Grants:	Susan G. Komen	$ 765	$ -	$ -	0
Other Grants:	IME Becas	$ 7,230			
Other Grants:	Oak Foundation			$ 20,000	0
Other Grants:	New Grants		$ 10,854	$ 63,219	482%
Miscellaneous/Other Revenue		$ 1,186	$ 325	$ 325	0%
Please list 3 largest Miscellanous sources:					
Interests & Dividends	$ 202.20				
Fiscal Sponsorship	$ 984.00				
	$ -				
Total Agency Revenue		**$ 769,185**	**$ 722,881**	**$ 772,698**	**7%**
AGENCY EXPENSES					
Compensation		$ 619,060	$ 504,445	$ 554,262	10%

Rent & Utilities		$ 121,540	$ 113,796	$ 113,796	0%
Supplies & Equipment		$ 87,736	$ 85,024	$ 85,024	0%
Travel & Training		$ 7,637	$ 15,466	$ 15,466	0%
Other Expenses:		$ 9,981	$ 4,150	$ 4,150	0%
Please list 3 largest "Other Expenses":					
Dues & Subscriptions	$ 2,655.00				
Banking & Processing Fee	$ 3,478.00				
Outreach & Advertising	$ 3,848.00				
Total Agency Expenses		**$ 845,954**	**$ 722,881**	**$ 772,698**	**7%**
SURPLUS/(DEFICIT) FOR PERIOD:		**$ (76,769)**	**$ -**	**$ -**	**0**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: El Centro Hispano, Inc.

****Due to a reduction in funding, El Centro Hispano reduced staff time for some employees to .80 FTE beginning in FY 2014-15. El Centro Hispano plans to increase all staff to 1 FTE and provide a 2% cost of living increase in FY 2015-16.*

Position Titles *** = Position Vacant**	**Full Time Equivalent****	**Program Staff +**	**Actual 2013-14**	**Estimated 2014-15**	**Projected 2015-16**	**% Total Budget**	**If provided, indicate:** **(R) Retirement Plan** **(H) Health Plan**
President/CEO	1/.80/1	1	$56,600	$46,720	$59,568	6.4%	(R)
Grant Writer	.50	1	$23,128	$23,590	$24,062	3.3%	
Development and Human Resources Director	1/.80/1	1	$34,300	$28,800	$36,720	4%	(H) (R)
Administrative Assistant	1/.80/1	1	$16,903	$20,592	$26,255	2.8%	(H)
Carrboro-Chapel Hill Office Coordinator/Outreach Coordinator	1	1	$24,334	$26,520	$27,050	3.7%	(H)
Support Services Program Director	1	1	$13,123	N/A	N/A	N/A	
Community Specialist	1	1	$24,977	N/A	N/A	N/A	
Education Program Director	1/.80/1	1	$31,939	$26,410	$33,673	3.7%	(H)
Education Supervisor	1/.80/1	1	$27,078	$22,497	$28,684	3.1%	(H)
Community Organizing Program Director	1	1	$29,307	$33,012	$33,672	4.6%	(H) (R)
Community Organizer	1	1	$23,877	N/A	N/A	N/A	
Community Organizer	1	1	$2,653	N/A	N/A	N/A	
Health Program Director	1	1	$31,912	$33,012	$33,672	4.6%	(H)

Health Specialist	1	1	$25,900	$26,000	$26,520	3.6%	(H)
Volunteer Time	2.04						

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: El Futuro

Street Address: 136 E. Chapel Hill Street, Durham, NC 27701

Mailing Address: 136 E. Chapel Hill Street, Durham, NC 27701

Website Address: www.elfuturo-nc.org

Executive Director: D. Luke Smith, M.D.

Telephone: 919-688-7101 E-Mail: lsmith@elfuturo-nc.org

Contact Person: Jennifer Casanova

Telephone: 9119-688-7101 ext 607 E-Mail: jcasanova@elfuturo-nc.org

Fax: 919-688-7102 Federal ID Number: 80-0122334

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$ 27,500	$27,500
Summary of intended use of funds: Funds will be spent on mental health and substance abuse services for Orange County residents who are uninsured and for whom there are no other available services.		
Town of Chapel Hill	$6,000	$6,000
Summary of intended use of funds: Funds will be spent on mental health and substance abuse services for Chapel Hill residents who are uninsured and for whom there are no other available services.		
Town of Carrboro	$5,000	$5,000
Summary of intended use of funds: Funds will be spent on mental health and substance abuse services for Carrboro residents who are uninsured and for whom there are no other available services.		

Executive Director

1/22/15
Date

Board Chair

1/22/15
Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:

El Futuro was incorporated in November 2004 and patients were first seen in November 2005. Since its formation, El Futuro has been committed to helping those in the Latino community of Orange County who have mental health and substance abuse problems (behavioral health disorders).

   b. Years in Operation:

El Futuro has been in operation for over 10 years.

   c. Mission or Vision Statement (if applicable):

Our mission is to strengthen the whole community by providing and advancing bilingual and culturally informed behavioral health treatment for underserved Spanish speaking individuals and families. We do this by providing 1) high impact (evidence based) clinical services; 2) training for professionals who work with this population; and 3) prevention, education and outreach in the community.

   d. Brief History of Agency:

El Futuro is a unique place where the Latino community is welcomed and receives specialized mental health and substance abuse treatment delivered in a way that honors each individual and empowers the Latino community. El Futuro is considered a pioneer and leader in North Carolina's mental health sector. We are known not only for our commitment to providing behavioral health services to members of the Latino community, but for doing so in a caring, respectful and culturally sensitive way. Many of those we help have experienced sexual abuse, physical abuse, human trafficking, migration trauma and many other traumas associated with poverty and immigration. In fact, 57% of all those who come to us for help endorse having suffered a traumatic event. Forty-five percent report domestic violence.

El Futuro's multidisciplinary team includes clinically trained social workers, child psychologists, child and adolescent psychiatrists, substance abuse counselors and a marriage and family therapist. Our bilingual staff provides informed and culturally sensitive treatment that is designed to provide lasting care not only for the individual but for the entire family.

Because we provide such a unique and needed service, individuals come from throughout the region to find help at one of our clinics. We have grown to establish not only our clinic in Carrboro but also clinics in Siler City and Durham. We do not seek a quick fix solution but rather work towards long-term sustainable changes that will help individuals

feel better (clinical improvement) and function better (socially, physically, occupationally, scholastically and in the home setting). At El Futuro we work to fulfill our name by offering a hopeful future or "El Futuro" for youth and their families.

Statistics from calendar year 2014:

- 1,605 people served with 9,802 sessions of psychiatry and therapy treatment; averaging 6-7 visits per person
- Of these, 296 were from Orange County.
- 99% of people served were financially needy per Federal Poverty Level guidelines.
- We closely monitor our services to ensure quality.

- 82% demonstrated clinical improvement or maintained their symptoms(less depressed, anxious, psychotic, improved behavior, less substance use, etc.)
- 87% had improved or maintained functioning (socially, physically, occupationally, academically, in home)
- In surveys of our former clients, 96% of respondents reported feeling helped, respected and indicated they would recommend El Futuro's services to friends or family.

In 2014, El Futuro received the state's highest honor for nonprofits from the N.C. Center for Nonprofits - the Nonprofit Sector Stewardship Award.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Latino immigrant families face trauma and issues related to deportation, immigration, and acculturation, contributing to behavioral health illnesses. Latino clients have traditionally been disproportionately underserved by the state's public mental health system as compared to other population groups. Based upon Census data and rates of behavioral illness in the Latino population, about 1,983 Latinos needed care in Orange County in 2011. We can estimate that 40% or 793 would have utilized care if it was accessible to them. During that year, El Futuro was able to provide service to more than 220 individuals.

The 2014 - 2016 Orange County Board of Health Strategic Plan specified increasing capacity of available mental health and substance abuse services as well as increasing access to those services. Additionally, the plan underscored the importance of and need for childhood mental health services as a special area of focus. In addition to already having few available behavioral health options for the Latino community, in the last several years funding has essentially dried up to provide care and our county has not made meaningful progress towards these goals. Cardinal Innovations is the Managed Care Organization (MCO) that acts as a state agent to plan and fund services for the uninsured of Orange County who have behavioral health disorders. Cardinal Innovations replaced OPC Area Program in April 2012 and subsequently denied any services to individuals who could not prove citizenship. This was a dramatic change from the

previous policy of OPC. Consequently, mental health providers have stopped providing services or severely limited their programs for Spanish speaking residents. El Futuro has not changed and so has increasingly become the go-to safety net provider. We routinely receive referrals from most all other human service agencies, UNC, the police department and sheriff, schools, DSS, and primary care providers. To say we are the only show in town just about captures the reality of the situation.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Cardinal Innovations is now following federal law and changed their policy to allow people with mental health needs that do not have a social security number to potentially receive services. But, Cardinal continues to allocate limited (inadequate) funding to serve the needs of undocumented immigrants. Effectively, while they say they no longer exclude services for undocumented immigrants, they have not provided any real resources to serve this population. The financial impact on El Futuro over the last three years of Cardinal Innovation's policy and control of funding has been a loss of well over $150,000. Our work in Orange County must further adapt to this limited funding. For this reason, we have discontinued our outpatient clinic formerly located in the IFC building. So that we are targeting children and families who are most at-risk, we selectively target them in settings where we can have the most impact. We have increasingly based our work in Orange County in schools and primary care clinics in order to accomplish this.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

El Futuro is a small agency that leverages limited resources for a big impact in peoples' lives. We are committed to building a sustainable program through a diverse funding mix. Municipal, county and state funding comprises 20% of our funding. We leverage those funds to raise contributions and grant revenue (10% and 20% of agency revenue, respectively). Just over 40% of our funding comes from reimbursements through client fees, Medicaid, Medicare and state funding for the uninsured. As available funding for the uninsured has decreased over the last several years we have worked hard to grow contributions and grant revenue. We also have increasingly partnered with the schools and primary care providers to establish contracts that reimburse us for work provided in those environments. However, since many providers have stopped serving this population due to funding cuts by Cardinal Innovations, El Futuro has become the main safety net provider for the Latino community when it comes to mental health and substance abuse services. Now more than ever, funding from the Town of Chapel Hill, Town of Carrboro and Orange County is critically important in helping us provide these needed services.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

Over the last ten years of providing clinical services to Orange County, Chapel Hill and Carrboro residents, El Futuro has been able to build strong relationships with outside agencies to accomplish and enhance our program goals. Through open communication and collaboration, these community partners work with us daily:

- **Chapel Hill-Carrboro City Schools and Orange County Schools -** We have grown our work in the schools. We provide informative parent nights, work with school teachers and staff daily to address behavior problems, emotional issues kids are having, and work to support families. We offer treatment groups for high-risk students and family members.
- **Crisis Counseling Agencies and Programs -** The Compass Center, Orange County Rape Crisis Center, Chapel Hill Police Crisis Unit, Chapel Hill Police Department Crisis Unit - individuals present to these agencies that provide crisis counseling and often find the person suffering from mental health or substance abuse disorders. They in turn call El Futuro to provide the needed services for Spanish speaking Latino victims.
- **Piedmont Health Services** - We provide treatment to individuals at the Prospect Hill and Carrboro Community Health Centers. Because many people present to their primary doctor with mental health and substance abuse issues and because many feel a bond of trust with providers at those centers, we have adapted our services to help individuals and families on-site when the problems are present and individuals are ready for treatment.
- **Cardinal Innovations Managed Care Organization (MCO)** - while Cardinal Innovations does not provide support to individuals unless they provide proof of citizenship, they do manage Medicaid funding and provide reimbursement for those who can prove citizenship and so we contract to provide those services.
- **Allied Behavioral Health Organizations:** UNC Hospital and Medical School, the Department of Psychiatry "Center for Excellence", Freedom House, and the Mental Health America Pro Bono Counseling Network are several organizations who provide services in our community who work with El Futuro to help Latino Spanish speaking individuals get the level of care they need.
- **El Centro Hispano** is a trusted partner we routinely collaborate with to help reduce the stigma of mental illness in the Latino community and El Centro refers many people to El Futuro for help.

Additionally, El Futuro is a part of the **Family Success Alliance Council** that was formed over the last year.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

El Futuro is committed to serving the Latino minority in Orange County. Ninety-eight percent of our clients identify as Latino or Hispanic. Latino immigrants traditionally rely on family, social networks and non-traditional informal services; as a result, El Futuro

strives to be a working liaison with these groups and strengthen the connection for affected individuals who are suffering. Traditional methods of outreach often have little meaningful penetration. By using narrative stories, personal testimony, picture story materials, and relationship-centered communication, we deliver messages that are received and understood. We work hard to "meet people where they are at" by offering help at schools, in primary care settings and other community locations where they feel most comfortable.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition	X	X	X	X
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
El Futuro will serve 260 Latino Orange County community members through our Orange County Clinical Services Program.	Outpatient mental health and substance abuse treatment services included psychiatric care and psychotherapy, evaluations, crisis interventions, and individual and family based treatment. We rely on fundamentally sound and time-proven strategies of providing care to individuals who are suffering from mental health and addiction illness. Our outpatient therapy and psychiatry services have consistently proven to be effective in this high risk population and we constantly push ourselves to be culturally sensitive, practical, and relevant in our approaches. All of our work is offered by clinicians who are bicultural and bilingual.	We served 293 individuals from Orange County during 2013-14.	Number of individuals served and demographics of each individual was gathered from the El Futuro electronic medical record kept for each person who received treatment.

70% of individuals served will experience an improvement or stabilization in clinical symptoms such as depression, anxiety and PTSD.		87 % of individuals served experienced an improvement or stabilization in clinical symptoms such as depression, anxiety and PTSD.	Clinical improvement was measured using tools such as the Child Behavior Checklist and the Pediatric Symptom Checklist.
60% of individuals served will experience an improvement or stabilization in functional indicators, such as the ability to work, take care of the home, attend school and maintain healthy relationships.		82% of individuals surveyed experienced an improvement or stabilization in functional indicators: able to work, take care of the home, attend school and maintain healthy relationships.	Functional improvement was measured by social, physical and childcare/school/occupational indicators.
90% of clients served will express satisfaction with the services they received at El Futuro and state they were helped with their presenting problem.		99% of clients surveyed expressed satisfaction with the services they received at El Futuro, and state they were helped with their presenting problem.	Satisfaction in treatment services was measured by a comprehensive survey.

If program(s) did not meet its stated goal(s), please explain:

N/A

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
El Futuro will serve 225 Latino Orange County community members through our Orange County Clinical Services Program.	Outpatient mental health and substance abuse treatment services included psychiatric care and psychotherapy, evaluations, crisis interventions, and individual and family based treatment. We rely on fundamentally sound and time-proven strategies of providing care to individuals who are suffering from mental health and addiction illness. Our outpatient therapy and psychiatry services have consistently proven to be effective in this high risk population and we constantly push ourselves to be culturally sensitive, practical, and relevant in our approaches. All of our work is offered by clinicians who are bicultural and bilingual.	We anticipate meeting our goal of at least 225 individuals served by year end.	Number of individuals served and demographics of each individual was gathered from the El Futuro electronic medical record kept for each person who received treatment.
70% of individuals served will experience an improvement or stabilization in clinical symptoms such as depression, anxiety and PTSD.		At least 70% of individuals served will experience an improvement or stabilization in clinical symptoms.	Clinical improvement was measured using tools such as the Child Behavior Checklist and the Pediatric Symptom Checklist.

60% of individuals served will experience an improvement or stabilization in functional indicators, such as the ability to work, take care of the home, attend school and maintain healthy relationships.		At least 60% of individuals surveyed will experience an improvement or stabilization in functional indicators.	Functional improvement was measured by social, physical and childcare/school/occupational indicators.
90% of clients served will express satisfaction with the services they received at El Futuro and state they were helped with their presenting problem.		At least 90% of clients surveyed will express satisfaction with the services they receive at El Futuro, and state they are helped with their presenting problem.	Satisfaction in treatment services was measured by a comprehensive survey.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: El Futuro, Inc.

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 43,943	$ 50,000	$ 52,000	4%
Program Generated Revenue (fees)	$ 191,465	$ 175,000	$ 185,000	6%
Local Government Grants:				
Orange County	$ 27,500	$ 27,500	$ 27,500	0%
Town of Chapel Hill	$ 5,000	$ 6,000	$ 6,000	0%
Town of Carrboro	$ 5,000	$ 5,000	$ 5,000	0%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 18,459	$ 18,459	$ 20,000	8%
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 91,147	$ 90,000	$ 95,000	6%
Please list 3 largest Miscellanous sources:				
Orange County ABC $ 22,000.00				
AHEC $ 15,600.00				
PCORI $ 14,692.00				
Total Program Revenue	**$ 382,514**	**$ 371,959**	**$ 390,500**	**5%**
PROGRAM EXPENSES				
Compensation	$ 279,692	$ 265,000	$ 280,000	6%
Rent & Utilities	$ 24,100	$ 24,500	$ 25,750	5%

Supplies & Equipment		$ 16,217	$ 17,500	$ 18,500	6%
Travel & Training		$ 1,200	$ 1,800	$ 2,100	17%
Other Expenses:		$ 61,305	$ 63,159	$ 64,150	2%
Please list3 largest"OtherExpenses":					
Contract clinical work	$ 32,440.00				
Insurance	$ 5,995.00				
Accounting/auditing	$ 4,305.00				
Total Program Expenses		**$ 382,514**	**$ 371,959**	**$ 390,500**	**5%**
SURPLUS/(DEFICIT) FOR PERIOD:		$ -	$ -	$ -	0

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]:

The El Futuro Clinical Services Program provides bilingual and culturally appropriate mental health and substance abuse treatment. A unit of service is defined as an assessment/evaluation or session of psychiatry or psychotherapy treatment along with associated targeted case management.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	1,893	1,893	$382,514	$202
Estimated FY14-15	1,615	1,615	$371,959	$230
Projected FY15-16	1,696	1,696	$390,500	$230

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	117	100	105	Durham City			
Female	176	150	158	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	0			Wake County			
Caucasian	5	4	4	Town of Chapel Hill	164	140	147
Hispanic	288	246	258	Town of Carrboro	75	64	67
Other	1	1	1	Orange County	54	46	48
3. **Age**				Other (specify)			
0-5 Years	2	2	2				
6-18 Years	122	104	109	Per cent of clients at, or below, federal poverty level	98% below 200% poverty level	95%	95%
19-50 Years	152	130	136				
51+ Years	17	15	15				
Unknown	0	0	1	***TOTAL # OF CLIENTS SERVED***	293	250	263

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: El Futuro, Inc.

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 131,829	$ 140,000	$ 150,000	7%
Agency Generated Revenue (fees)	$ 574,396	$ 650,000	$ 672,500	3%
Local Government Grants:				
Orange County	$ 27,500	$ 27,500	$ 27,500	0%
Town of Chapel Hill	$ 5,000	$ 5,000	$ 5,000	0%
Town of Carrboro	$ 5,000	$ 5,000	$ 5,000	0%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 18,459	$ 18,459	$ 20,000	8%
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 512,862	$ 500,000	$ 600,000	20%
Please list 3 largest Miscellanous sources:				
Alliance Behavioral Health $ 61,815.00				
PCORI $ 52,318.00				
AHEC $ 42,000.00				
Total Agency Revenue	**$ 1,275,046**	**$ 1,345,959**	**$ 1,480,000**	**10%**
AGENCY EXPENSES				
Compensation	$ 932,307	$ 900,000	$ 984,000	9%
Rent & Utilities	$ 107,910	$ 115,000	$ 125,000	9%

Supplies & Equipment		$ 54,056	$ 55,000	$ 60,000	9%
Travel & Training		$ 16,976	$ 16,000	$ 17,000	6%
Other Expenses:		$ 128,200	$ 259,959	$ 294,000	13%
Please list 3 largest "Other Expenses":					
Contract clinical work	$ 90,857.00				
Insurance	$ 19,984.00				
Accounting/auditing	$ 14,350.00				
Total Agency Expenses		**$ 1,239,449**	**$ 1,345,959**	**$ 1,480,000**	**10%**
SURPLUS/(DEFICIT) FOR PERIOD:		**$ 35,597**	**$ -**	**$ -**	**0**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: El Futuro

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	0.50	30%	52,605	52,605	52,605		(H)
Psychiatrist	0.50	30%	100,000	100,000	100,000		(H)
4 Support Staff	1.00	30%	259,197	258,000	265,000		(H)
1 Office Assistant	1.00	80%	40,884	40,884	42,000		(H)
1 Licensed Clinical Social Worker	1.00	60%	46,127	48,537	50,000		(H)
1 Licensed Clinical Social Worker	1.00	70%	55,668	28,125	57,000		(H)
1 Licensed Clinical Social Worker	0.40	100%	15,120	12,500	16,500		
1 Office Assistant	1.00	10%	34,000	39,857	41,000		(H)
4 Licensed Professional Counselors	1.00	0%	210,677	197,498	210,000		(H)
1 Support Staff	1.00	40%	48,035	49,000	50,000		(H)
2 Licensed Substance Abuse Counselors	0.75	20%	69,994	72,994	75,000		(H)
1 Licensed Clinical Social Worker	0.50	50%	0	0	24,895		

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.

- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **EmPOWERment, Inc.**

Street Address: 109 N. Graham Street, Suite 200, Chapel Hill, NC 28516

Mailing Address: same

Website Address: www.empowermentinc-nc.org

Executive Director: Delores Bailey

Telephone: 919-967-8779 E-Mail: empowermentincnc@gmail.com

Contact Person: La Tanya Davis, Property Manager

Telephone: 919-967-8779 E-Mail: lddavis67@gmail.com

Fax: 919-967-0710 Federal ID Number: 56-1965772

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	**$20,000.00**	**$ 20,000.00**
Summary of intended use of funds: With funding provided through the Human Services Grant, EmPOWERment, Inc. has created a one-stop shop for affordable rental programs and services. EmPOWERment, Inc. is the primary provider of much needed affordable rentals in Orange County. Local agencies such as Social Services, the Interfaith Council, Community Empowerment Fund, and Housing for New Hope and area churches are able to refer individuals and/or families that are in need of a safe, clean and affordable place to live. This fiscal cycle the affordable rental program will increase its services to include more Housing Choice voucher holders, veterans, more individuals transitioning from homelessness, senior and disabled populations. The property manager position is responsible for the management of 46 rental units throughout Orange County. These units are made available for families and individuals at income levels that range from moderate to low-low.		
Town of Chapel Hill	**$13,500.00**	**$15,000.00**
Summary of intended use of funds: With funding provided through the Human Services Grant, EmPOWERment, Inc. has created a one-stop shop for affordable rental programs and services. EmPOWERment, Inc. is the primary provider of much needed affordable rentals in Orange County. Local agencies such as Social Services, the Interfaith Council, Community Empowerment Fund, and Housing for New Hope and area churches are able to refer individuals and/or families that are in need of a safe, clean and affordable place to live. This fiscal cycle the affordable rental program will increase its services to include more Housing Choice voucher holders, veterans, more individuals transitioning from homelessness, senior and disabled populations. The property manager position is responsible for the management of 46 rental units throughout Orange County. These units		

are made available for families and individuals at income levels that range from moderate to low-low.		
Town of Carrboro	**$8,000.00**	**$8,000.00**
Summary of intended use of funds: With funding provided through the Human Services grant, EmPOWERment, Inc. has created a one-stop shop for affordable rental programs and services. EmPOWERment, Inc. is the primary provider of much needed affordable rentals in Orange County. Local agencies such as Social Services, the Interfaith Council, Community Empowerment Fund, and Housing for New Hope and area churches are able to refer individuals and/or families that are in need of a safe, clean and affordable place to live. This fiscal cycle the affordable rental program will increase its services to include more Housing Choice voucher holders, veterans, more individuals transitioning from homelessness, senior and disabled populations. The property manager position is responsible for the management of 46 rental units throughout Orange County. These units are made available for families and individuals at income levels that range from moderate to low-low.		

Delores Bailey
Executive Director

1/22/15
Date

Thomas J. Esthimer
Board Chair

1-22-15
Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:
      March 27, 1996

   b. Years in Operation:

      18

   c. Mission or Vision Statement (if applicable):
      The mission of EmPOWERment, Inc. is to empower people and communities to determine their own destinies through affordable housing, community organizing and grassroots economic development.

   d. Brief History of Agency:

      EmPOWERment Inc. is a 501 (c) 3, nonprofit, community development corporation that promotes community building, problem solving and social action to build shared vision and power for positive community change. The organization was founded in March 1996 by residents of the working class neighborhoods of Chapel Hill and Carrboro and has expanded its services throughout Orange and Chatham counties. EmPOWERment Inc's primary fields of focus are providing affordable housing for homeownership and rental, community advocacy through community organizing, and economic development, through our small business incubator.

      Our mission is accomplished through the following programs: homebuyers' education and counseling; production of affordable housing; business supportive services; community organizing; summer youth employment; and efficient management of affordable rental properties

      Our property manager advertises properties, manages them and handles evictions, turnovers and client screenings. Tenants are able to call or visit one location for their apartment concerns. The assistance requested in this proposal will help to pay the salary and benefits for this position and some property management expenses (e.g. advertising, apartment turnover expenses court expenses, etc.).

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. **Describe the identified community need(s) the Program(s) funded will address.**

Affordable rentals have become a crucial issue in all of Orange County in recent years. There has been a considerable rise in senior, homeless, veteran, disabled, and displaced citizens. Property owners are under particular strain to maintain homeownership as property values increase and commercial development projects around our targeted neighborhoods escalate. The shift in the economy has forced many families to re-think home ownership at this time and search for affordable renting. Although the increase in student housing is driving up the cost of rentals, EmPOWERment, Inc. continues to be the main source for traditional affordable rentals in Orange County.

In the past year there have been a number of changes to the Housing Choice voucher program. More landlords have made the decision not to accept vouchers, which has increased the demand for EmPOWERment, Inc. units. Families earning 60-80% AMI are being drastically affected. This funding allows EmPOWERment, Inc. to continue to manage affordable rentals and also to accept vouchers from qualified renters.

The uniqueness of the EI Affordable Rental Program allows us to offer "second chance" opportunities to many potential tenants. Our mission is to always provide clean, safe and secure, affordable housing to as many individuals/families as possible.

3. **Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.**

EmPOWERment, Inc. is aggressively seeking to acquire additional rental units to address the ever increasing need for affordable properties, which will increase revenue stream. Our goal is to acquire at least two properties per year. We are constantly seeking privately owned homes to manage.

EmPOWERment, Inc. has already initiated and hopes to expend a collaboration with the Housing Counselor on staff to assist struggling and delinquent rental tenants. The Housing Counselor assists rental tenants in developing payment plans and financial budgets, as needed. The Property Manager is taking additional classes that cement her rental counseling. Together they counsel current and potential rental clients.

The program is actively applying for housing funds from financial institutions and private organizations.

4. **Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.**

On-Going Initiatives:

Each unit is charged a monthly management fee by the property owner under a separate Memorandum of Understanding agreements with EmPOWERment, Inc.

Funding by local governments will continue to be requested.

Community service workers are a considerable help to the EmPOWERment, Inc. staff. We are able to help them earn their service hours while cutting back on some of our labor costs for maintaining the units.

EmPOWERment, Inc. continues to apply for HOME funds to purchase additional units to increase affordable rental inventory.

We continue to look for support from local businesses such as Lowe's, Sherwin Williams, and Wells Fargo for maintenance and upkeep of our apartments.

New Sources:

EmPOWERment, Inc. is applying for funds to purchase additional units through:
North Carolina Community Development Initiative
State Employees Credit Union

EmPOWERment, Inc. is developing collaborative relationships with new vendors, such as Home Depot, to renovate and improve existing units. We are also currently conducting research to develop a Veteran Housing Program spreadsheet to assist homeless veterans in Orange County. We have been in contact with the Durham VA, as well as the Orange County VSO, Betsy Corbett.

In 2015-16 we will conduct research to develop a housing spreadsheet that identifies basic information about homeless veterans in Orange County. This information will be used to assist veterans in accessing their benefits. We have been in contact with the Durham Veterans Administration as well as the Orange County VSO, Betsey Crockett.

5. **Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)**

- EmPOWERment Inc. collaborates with Social Services, Habitat for Humanity, Community Home Trust, Interfaith Council, Housing for New Hope, Club Nova, UNC Chapel Hill School of Medicine Department of Psychiatry and Community Empowerment Fund to help place qualified residents in affordable rental units. We provide a range of services that

include: assisting with acquiring rental housing, securing utility services and transitioning into home ownership.

- We are partners with Project Homeless Connect providing counseling services when possible and making homeless persons who are ready for apartment living a priority. We work diligently with case workers to help some of these tenants secure rent or utility deposits. EmPOWERment, Inc. continues to assist families in transitioning from various states of homelessness into permanent housing. In this effort we worked closely with Housing for New Hope and Social Services on projects such as the Rapid Re-Housing Program and Orange County Partnership.

- We work constantly with the Police Department, our neighborhood Watch Program and with UNC students and administrators to address the needs of underserved individuals in our community through program assistance and information sharing.

- EmPOWERment, Inc. continues to work with the TABLE program. This collaboration allows elementary age children of our residents to participate in TABLE's weekend backpack food program.

- We continue to collaborate with Justice United to bring light to neighborhood issues that may require Town Council attention. In conjunction with Justice United, UNC Chapel Hill School of Law Clinic and the Orange County Department of Housing, Human Rights and Community Development, we have participated in discussion with landlords about the conditions of their units and what's needed for improvements.

- EmPOWERment, Inc. continues to collaborate with Chapel of the Cross Church and local developers to provide free gently used furniture and appliances to low income families.

- We have partnerships with local churches and faith based organizations to provide temporary financial assistance to residents in need. In early 2015 the i3Cares Foundation awarded EmPOWERment, Inc. a donation to establish an emergency assistance program. The fund will provide assistance with rent and utilities when tenants are experiencing financial hardships.

- We continue to partner with Community Empowerment Fund to transition homeless individuals into permanent housing through "home sharing" as housemates where possible.

6. **How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?**

EmPOWERment's, Inc. targeted neighborhoods are those which are traditionally African American, emerging Latino and low wealth. Our community outreach involves grassroots organizing primarily through our Monthly Community Outreach Meeting. We stay connected to the residents by handing out flyers door-to-door to inform them about the upcoming neighborhood events. The events that we sponsor include block parties, initiatives targeting student engagement in the neighborhood and Rogers Road back to school project. We are members of Orange County Justice United which addresses issues such as affordable housing, tenants' rights, living wage and the basic needs of the underserved populations throughout Orange County.

We work closely with the following agencies that serve a diverse clientele:

Project Connect
Department of Social Services
Housing for New Hope
The Interfaith Council
The Orange County Public Schools
Community Empowerment Fund
Mental Health Carolina Outreach
Triangle Family Services
Orange County Justice United
Local Churches

7. **Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).**

Category	Youth	Adult	Older Adults	Persons with Disability
Education (Housing Counseling)		X	X	X
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing	X	X	X	X
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Maintain low 95% occupancy rate.	Work closely with housing partners such as: DSS, IFC, and Housing for New Hope, as well as new media technology.	Goal met. We reached record number for occupancy rate of 98.6%.	Data was collected each month and charted on units' occupancy rates.
Improve rent collection rate to 90%.	Property manager sends out late notices to remind tenants of late rents. 2014 tenants 30 days delinquent are encouraged to sign up for counseling and budget sessions with EI housing counselor.	Goal met for collecting rents on time at 91.3%.	Data was collected and charted each month on rents collected on time.
Increase rental inventory by 2.	EmPOWERment will continue to market to private owners and request HOME funds to increase number of affordable rental stock.	Goal reached of acquiring 2 rental units (116 Cole Street, 505 Edwards)	Total number of units was charted for new units acquired each month.
Turn over for apartments done in less than 30 days	The use of community service individuals and volunteers help to clean and service units to ensure a timely turnaround time for upcoming tenants.	Met goal of 100%.	Maintained spreadsheet with number of days units were off market for rental.
Complete annual housing quality service inspections	Property manager, along with volunteers, schedule once a year inspections of all rental units.	100% of units inspected.	Property manager, along with volunteers, charted number of units inspected each quarter.
Create a more systematic system to calculate number of people served through the agency.	Create uniform spreadsheet to document number of people served.	Goal met. Improve evaluation tool based on industry standards.	Data was collected at end of each month and entered into spreadsheet for totals.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Increase affordable rental stock by 2.	Empowerment will continue to market to private owners	Add 2 new units this funding year.	Maintain spreadsheet with total number of affordable rental units
Provide housing for 2 families threatened to be homeless:	EmPOWERment will continue to work with Housing Choice, Housing for New Hope, Community Empowerment fund, DSS, Interfaith, & Club Nova	Goal is to place at least 2 families in EmPOWERment units.	Chart data of how many families threatened by homelessness or threatened by homelessness.
Maintain low 95% occupancy rate	Continue to work with agencies such as: DSS, IFC, Housing for New Hope, and marketing with new media technology.	Maintain 92% or less vacancy rate	Monthly reports charting vacancy rates
Collaboration with property manager & housing counselor for tenants facing financial difficulties	Property manager will refer rental tenants to housing counselor for assistance when 30 days delinquent.	Assist in developing budgeting goals.	Using Quickbooks to alert when tenants are 30 days delinquent.
Complete annual housing inspections	Property Manager, along with volunteers, schedule once a year inspection of all rental units.	Continue to utilize evaluation tool to document inspections.	Chart data on spreadsheet.
85% of the current and potential tenants will receive counseling	Property Manager and Housing Counselor will provide finance /budget counseling	New Goal	Documentation will be maintained with tenant records.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: EmPOWERment, INC

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)	$ 298,245	$ 307,192	$ 316,408	3%
Local Government Grants:				
Orange County	$ 15,000	$ 20,000	$ 20,000	0%
Town of Chapel Hill	$ 13,500	$ 13,500	$ 13,500	0%
Town of Carrboro	$ 6,000	$ 8,000	$ 10,000	25%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 332,745**	**$ 348,692**	**$ 359,908**	**3%**
PROGRAM EXPENSES				
Compensation	$ 52,755	$ 54,338	$ 55,967	3%
Rent & Utilities	$ 18,459	$ 19,012	$ 19,583	3%
Supplies & Equipment	$ 46,956	$ 48,364	$ 49,816	3%
Travel & Training				0
Other Expenses:	$ 63,149	$ 65,043	$ 66,995	3%
Please list 3 largest "Other Expenses":				
HOA Dues $ 31,682.00				
Management Fees $ 28,890.00				
Property Taxes $ 1,519.00				
Total Program Expenses	**$ 181,319**	**$ 186,757**	**$ 192,361**	**3%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 151,426**	**$ 161,935**	**$ 167,547**	**3%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: Number of individuals served.

*Program cost does not include mortgage expenses for dwellings. Mortgages are included in agency budget per Tonya Walton.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	516	516 (exceeded estimate by 95 units)	181,319	351
Estimated FY14-15	542	542	186757	344
Projected FY15-16	569	569	192361	338

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	187	196	205	Durham City			
Female	329	345	362	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	347	364	382	Wake County			
Caucasian	119	125	131	Town of Chapel Hill	375	394	413
Hispanic	44	46	49	Town of Carrboro	125	131	138
Other	6	6	7	Orange County	16	17	18
3. **Age**				Other (specify)			
0-5 Years	101	106	111				
6-18 Years	121	127	133	Per cent of clients at, or below, federal poverty level	90%	94%	99%
19-50 Years	184	193	203				
51+ Years	110	116	121		516	541	
Unknown				***TOTAL # OF CLIENTS SERVED***			569

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: EmPOWERment, INC

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 14,781	$ 15,224	$ 15,681	3%
Agency Generated Revenue (fees)	$ 54,340	$ 55,970	$ 57,649	3%
Local Government Grants:				
Orange County	$ 15,000	$ 20,000	$ 20,000	0%
Town of Chapel Hill	$ 40,500	$ 40,500	$ 40,500	0%
Town of Carrboro	$ 6,000	$ 8,000	$ 10,000	25%
Other Local: Triangle Community Foundatior	$ 1,392			0
Other Local: Community Grant	$ 365			0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government	$ 54,598	$ 78,000		-100%
Federal Government				0
Other Grants: The Intiative	$ 27,000			0
Other Grants:				0
Miscellaneous/Other Revenue	$ 391,762	$ 403,515	$ 415,620	3%
Please list 3 largest Miscellanous sources:				
Rental Income $ 298,245.00				
MBC Income $ 57,703.00				
Career Explorers $ 27,655.00				
Total Agency Revenue	**$ 605,738**	**$ 621,209**	**$ 559,450**	**-10%**
AGENCY EXPENSES				
Compensation	$ 239,855	$ 247,051	$ 197,002	-20%
Rent & Utilities	$ 162,710	$ 167,591	$ 172,619	3%
Supplies & Equipment	$ 16,757	$ 17,259	$ 17,776	3%
Travel & Training	$ 1,294	$ 1,333	$ 1,373	3%
Other Expenses:	$ 156,319	$ 161,009	$ 165,839	3%
Please list 3 largest "Other Expenses":				
Rental Property $ 128,564.00				
Audit $ 5,900.00				
Community Organizer $ 4,996.00				
Total Agency Expenses	**$ 576,935**	**$ 594,243**	**$ 554,609**	**-7%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 28,803**	**$ 26,966**	**$ 4,841**	**-82%**

Section VI.

Comparative Budget for Entire Agency
(Excel file)

Agencies must still send a copy of the MS Excel file with their electronic application, even if they choose to embed the Excel table, on this page. The MS Excel file can be found here.

1. Please complete a Comparative Budget Excel Form **for the entire agency.** This budget form is required, even if the figures match the Program Budget Form(s).

2. If the agency's finances experienced significant changes that you would like to explain, please use the space below.

ADDITIONAL NOTES FROM EMPOWERMENT

A. Section IV : Program Statistics and Costs

We used "Total Program Expenses" from Agency Budget as Total Program Cost on Page 7.

B. Comparative Budget For Entire Agency

*2015-16 Compensation goes down because we will lose North Carolina Finance Agency funding meaning we lose the Housing Counselor position and Housing Counselor.

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: EmPOWERment Inc.

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Property Manager	1.0	1.0	52,755.00	1.0	1.0	22	H
Executive Director	1.0						H
Housing Counselor	1.0						
Director of Community Programming	.75						
Finance Staff (Vacant)	.5						
Intake Specialist	.5						
Volunteer Staff 4000/1960=2.0	2.0	2.0		2.0	2.0		

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside AgencyFunding Application
July 1, 2015through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Fairview Community Watch**

Street Address: 555 Homemont Ave., Hillsborough, NC 27278

Mailing Address: Same

Website Address: N/A

Executive Director: Dorothy N. Johnson

Telephone: 919-732-5429 E-Mail: johnson555v@nc.rr.com

Contact Person: Dorothy N. Johnson

Telephone: 919-732-5429 E-Mail: johnson555v@nc.rr.com

Fax: Federal ID Number: 45-4546721

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$ 2000.00	$4,000.00
Summary of intended use of funds: Monies will be used to hire monitors that would support park activities for the Fairview Community Park during the period from June – September 2015.		
Town of Chapel Hill	$	$
Summary of intended use of funds: N/A		
Town of Carrboro	$	$
Summary of intended use of funds: N/A		

Dorothy N. Johnson

Executive Director

March 31, 2015

Date

Board Chair

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:

      July 24, 2014

   b. Years in Operation:
      Since early 1990s

   c. Mission or Vision Statement (if applicable):

      Making the Fairview Community a safe, healthy, fair and enjoyable place to live.

   d. Brief History of Agency:

      Fairview Community Watch is a volunteer neighborhood organization serving Hillsborough. It is the only organized group in this historic, formerly mostly African American and poor, community in Hillsborough built for the African American mill workers in the early 20th Century. The neighborhoods that Fairview Community Watch serves are comprised of over four hundred residents.

      Over the past several years, Fairview Community Watch has worked with the Police Department along with other neighborhood groups to clean up the community. After the hard work of twenty years, the community is safe, quiet, and 98% drug free.

      Fairview Community Watch helped establish Fairview Park, a beautiful park where families can go play and enjoy a safe space together. This park opened in April of 2011.

      Fairview Community Watch is a volunteer neighborhood organization serving Fairview residents as well as others in the broader Hillsborough community. It is the only organized group in this historic, formerly mostly African American and poor, community in Hillsborough built for the African American mill workers in the early 20th Century. The neighborhoods that Fairview community Watch serves are comprised of over four hundred residents, including a growing population of Latino families.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFICPROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

   Park monitors are needed to provide an adult presence for assuring park safety, to distribute sports equipment and games to families visiting the park, and to organize community activities for residents and visitors to the park.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

The program will continue as it has for the past three years, with plans for adding regularly scheduled family-focused activities June through September 2015.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

Initially the park monitoring was supported by a Self Development of People grant and then later from donations from churches, individuals, and county government. There are no on-going sources of funding for this program. Donations must be sought each year.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencieswhich accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)
   - Coordinated with Parks and Rec for assistance with equipment purchases
   - Worked with Orange Tennis Club for free tennis lessons
   - In close collaboration with the Hillsborough Police Department for safety backup support.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the resultsof the Program(s) to be funded?

We hire our monitors and assistants from the community which consists of African American and Latino members.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X	X	X
Health and Nutrition	X	X	X	X
Job Training				
Sports and Arts Activities	X	X	X	x
Pre-School Activities				
After-School Activities (summer)	x			
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Adult monitoring to promote park safety	Adult monitors are present in the park during specified hours during the week.	Monitors were present 4 days/week June – August.	Employee time sheets were checked.
To distribute sports equipment and games to families visiting the park.	Monitors distributed and engaged kids in activities.	Equipment and games were distributed to an average of 4-5 families/day.	There were checklists and forms for checking out equipment and games.
Fairview Forward Fun Day	Food and activities for community members.	Approximately 200 plus people were in attendance.	Observation and count of people attending.
Basketball Tournament	Organized for 2 aged groups (youth and teens)	Approximately 30 kids participated. Trophies were given out and each participant was given a certificate.	Tournament signup sheets and personal observation.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Adult monitoring to promote park safety	Adult monitors are present in the park during specified hours during the week.	Monitors were present 4 days/week June – August.	Employee time sheets were checked.
To distribute sports equipment and games to families visiting the park.	Monitors distributed and engaged kids in activities.	Equipment and games were distributed to an average of 4-5 families/day.	There were checklists and forms for checking out equipment and games.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Fairview Community Watch

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 3,360	$ 1,210	$ 500	-59%
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County				0
Town of Chapel Hill				0
Town of Carrboro				0
Other Local: County Commissioners matchin		$ 2,000		-100%
Other Local: County Commissioners Grant			$ 4,000	0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: SDOP -funds remaining from 20	$ 855			0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
remaining funds from 2013 $ 747.00				
$ -				
$ -				
Total Program Revenue	**$ 4,215**	**$ 3,210**	**$ 4,500**	**40%**
PROGRAM EXPENSES				
Compensation	$ 3,223	$ 3,138	$ 3,667	17%
Rent & Utilities	$ 20		$ 80	0
Supplies & Equipment	$ 225		$ 550	0
Travel & Training				0
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				

Total Program Expenses	$ 3,468	$ 3,138	$ 4,297	37%
SURPLUS/(DEFICIT) FOR PERIOD:	$ 747	$ 72	$ 203	182%

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]:

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost÷ Total Program Units that Met Goal
Actual FY13-14	1	1		
Estimated FY14-15	1	1		
Projected FY15-16	1	1	$4,000.00	

Defining a Unit of Service[+]

- *In a brief statement, define one unit of service for each program*
  Example:A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelteror the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	N/A	N/A	N/A	Durham City			
Female	N/A	N/A	N/A	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	N/A	N/A	N/A	Wake County			
Caucasian	N/A	N/A	N/A	Town of Chapel Hill			
Hispanic	N/A	N/A	N/A	Town of Carrboro			
Other	N/A	N/A	N/A	Orange County			
3. **Age**				Other (specify)			
0-5 Years	N/A	N/A	N/A				
6-18 Years	N/A	N/A	N/A	Per cent of clients at, or below, federal poverty level			
19-50 Years	N/A	N/A	N/A				
51+ Years	N/A	N/A	N/A				
Unknown	N/A	N/A	N/A	***TOTAL # OF CLIENTS SERVED***			

Section VII: Schedule of Positions

Please include **all**paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined.(i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Adult Park Monitor	N/A						
Adult Park Monitor	N/A						
Youth Park Monitor	N/A						
Youth Park Monitor	N/A						

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Fairview Community Watch Park Monitors Program Budget2015

Monitors and Assistants: 8 weeks at 18 hours/week, Monthly Family Fun Events, and final Fairview Forward Celebration

Funded positions/activities	Description	Total
Lead Monitor	$15/hr @ 144 hours June - Aug	$2160
Assistant Monitor	$8/hr @144 hours June - Aug	$1152
Hours Supervisor	$25/week for 8 weeks	$ 200
Sub-total		$3,512
Fairview Forward Celebration		
Monitor hours	5 hours each (lead monitor @ $15/hr + 2 assistants @ $8/hr)	$155
Food and supplies	Food and paper products/games materials	$250
Rent	Shelter fee	$ 20
Sub-total		$425
Family Fun Nights (monthly)		
Food and supplies	Food and paper products/games materials	$300
Rent	Shelter fee	$ 60
Sub-total		$360
Total budget		**$4,297**

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Farmer Foodshare**

Street Address: 105 Hood St, Durham NC 27701

Mailing Address: PO Box 2873, Chapel Hill, NC 27515

Website Address: www.farmerfoodshare.org

Executive Director: Gini Bell

Telephone: 919.360.6358 E-Mail: gini@farmerfoodshare.org

Contact Person: Gini Bell

Telephone: 919.360.6358 E-Mail: gini@farmerfoodshare.org

Fax: Federal ID Number: 27-3717889

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$5,000	$10,000
Summary of intended use of funds: We are requesting funds to support programs we operate in Orange County: **Donation Stations** and **Farm to Pantry**. **Donation Stations** connect local produce to local hunger relief organizations through donations from farmers' market shoppers and farmers. **Farm to Pantry** provides matching and mini grants to local organizations that serve the hungry to purchase fresh food from local farms for meal preparation and distribution to the hungry.		
Town of Chapel Hill	$1,000	$5,000
Summary of intended use of funds: We are requesting funds to support two programs we operate in Chapel Hill: **Donation Station Program** and **Farm to Pantry**. The Chapel Hill **Donation Station** connects local produce to local organizations serving at risk community members, like the IFC and Club Nova, through donations from farmers' market shoppers and farmers. **Farm to Pantry** provides matching and mini grants to Chapel Hill organizations that serve the hungry to purchase fresh food from local farms for meal preparation and distribution to the hungry. Some Chapel Hill partners we currently work with include PORCH, IFC, and Meals on Wheels.		
Town of Carrboro	$1,000	$5,000

Summary of intended use of funds:

We are requesting funds to support two programs we operate in Carrboro: **Donation Station Program** and **Farm to Pantry**. The Carrboro **Donation Station** connects local produce to local organizations serving at risk community members, like the IFC, Human Rights Center, TABLE, and PORCH, through donations from farmers' market shoppers and farmers. **Farm to Pantry** provides matching and mini grants to Carrboro organizations that serve the hungry to purchase fresh food from local farms for meal preparation and distribution to the hungry. Some Carrboro partners we currently work with for Farm to Pantry include PORCH, IFC's Homestart, TABLE, and Club Nova.

Executive Director	Board Chair
Date	Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:
   Operating since 2009, incorporated in 2010

   b. Years in Operation:
   5

   c. Mission or Vision Statement (if applicable):

   Farmer Foodshare connects people who grow food with people who need food in ways that are economically sustainable and socially just. We believe that everyone has a right to healthy fresh food, and farmers deserve to make a fair wage- a system where everyone wins.

   d. Brief History of Agency:
   Farmer Foodshare is a nonprofit social services agency that seeks to build strong community food systems by connecting farm fresh food with agencies that serve the hungry. We were formed by the farmers and shoppers of Carrboro Farmers' Market as an effort to get a consistent and appropriate supply of fresh food to agencies feeding the hungry in our community, like the IFC, TABLE, PORCH, Human Rights Center of Carrboro and Chapel Hill, Central Elementary School in Hillsborough, Friends of the DSS, Community Empowerment Fund and any others in the community that need to have the healthiest possible food in their programs. Since founding, the program has been asked to serve every farmers market in Orange County, as well as seven additional counties – and provides fresh food for over 16 social services agencies in Orange County.

We work hard to ensure that the farmers, many of whom struggle financially themselves, are also compensated for the food they provide, either through shoppers buying food from the farms and then donating it through our Donation Station Program, or through securing supplemental financial resources (such as matching grants we provide through our Farm to Pantry program) to purchase consistent amounts of appropriate food for our agency clients. Farmer Foodshare has a wholesale produce market to broker, collect, and deliver produce from local farmers to local non-profit buyers at wholesale costs.

In 2014 Farmer Foodshare spent $140,000 in new money with small-scale local farms purchasing fresh food for low-income members of our community through our Farm to Pantry and Donation Station efforts. Our programs reach over 20,000 North Carolinians over the course of the year, including more than 2000 families in Orange County.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Both Donation Stations (Program 1) and Farm to Pantry (Program 2) address hunger and malnutrition in our communities while supporting the local farm economy.

Both programs seek to address high hunger rates and low access to healthy food in Orange County. The USDA defines food insecurity as "limited or uncertain access to adequate food." According to Feeding America's Map the Meal Study, in the United States 1 in 6 adults and 1 in 5 children are food insecure. Although North Carolina is the 8th largest agricultural producer in the country, food insecurity in North Carolina is higher than the national average, with 1 in 5 adults and 1 in 4 children suffering from food insecurity. Sadly, pockets within Orange County fall into even higher rates of food insecurity.

We believe the solution to hunger and malnutrition lies in increasing system change that provides consistent access to fresh food, to which both programs 1 and 2 contribute. By addressing hunger and malnutrition we can strike a blow at related chronic system level public health problems as well, like childhood obesity and type II diabetes. The Food and Agriculture Organization of the United Nations recently declared that one solution to world hunger is through strengthening local producer markets. Both program 1 and 2 strengthen markets for local farmers while helping to strike a blow at hunger and malnutrition in our community.

The agencies and pantries served through program 1 and 2 provide direct services to people at risk for hunger and malnutrition in our communities. These agencies work hard to provide resources to their clients. However, most of the food that they provide is canned or shelf-stable. This food often is high in sodium, sugar or other additives and is

insufficient by itself as a full meal. Both programs work in deep collaboration with our social service agency clients to ensure that they can provide a regular supply of local farm fresh food to their end users. This helps strengthen the health of local residents, particularly people facing diet-related diseases, such as obesity, diabetes and heart disease.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

   Program 1: Donation Stations are farmers' market based and are operationally developed, but the individual costs to run and maintain the Donation Stations are dependent on support from local communities in which they operate. 100% of cash donations at market go to purchasing food to donate. Donation Stations have been developed to run largely on volunteer power and donated supplies, but there are still costs associated with running and coordinating stations, namely training for markets and volunteers, reporting and record keeping, and supplies and materials for operating the Donation Stations. We are seeking funding to help support the financial reality of operating Donation Stations so that community donations can continue to 100% support local hunger.

   Program 2: Farm to Pantry relies on partner agencies allocating part of their budget for fresh food purchases and on outside grant funding supplementing agency-buying power. In these tough economic times we have found that agencies are still deeply committed to providing quality fresh food to their clients, but not necessarily able to dip into their limited budgets to meet demand. We are seeking funds to procure food for local agencies to more steadily supplement their client needs, rather than exclusively relying on small donations at market and gleaning. This will allow us to support both the agencies and the limited resource local farms much more effectively and sustainably.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

   Program 1: Donation Stations operate across eight NC counties using a local, grassroots approach to run individual stations and connect produce collected at each station with a local agency. We are seeking regular local sponsorships from churches or businesses and local funding from town and county funding to support individual Donation Stations. We regularly get in kind donations from the markets and market community and expect this to continue.

   Program 2: Farm to Pantry is funded by corporate and town funders. Some funding streams recur annually and others do not. As demand for fresh produce has grown, we have had to continually seek new funding streams to meet the need. This year we received several corporate contributions and new foundation contributions to provide regular and consistent fresh food to our partners. With these funds we are able to provide matching and mini grants to partners to buy food from local farmers through our wholesale market, a small scale aggregation and distribution system where produce is purchased in bulk.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

Farmer Foodshare works collaboratively in all of our efforts. We believe that food is a "system, not a silo", and that approaches to ending hunger and food insecurity must be taken collaboratively in partnership. Our Donation Station Program (Program 1) does not provide food directly to individuals, but rather works with agencies within the community to distribute fresh produce to their networks of individuals in need. This way we are able to both support existing efforts, and keep our overhead costs low. Additionally, our partner agencies come to the farmers market where they engage with our volunteers, the farmers, and the community while picking up food donations. We have a regular dialogue with partners to provide support like recipes and fresh food safety information, to helping source the right kinds of produce in the right amounts. When requested, we also connect our agency partners with cooking demonstrations, volunteers to help with food prep and packing, and support in purchasing cold storage.

In Orange County we work in deep partnership with the following agencies, both through donations (program 1) and food purchasing (program 2):

- Amigas en Salud (Program 1 and 2)
- Camp Chestnut Ridge (Program 2)
- Central Elementary School families in dire need (as identified by the school social worker) (Program 1)
- Chapel of the Cross (Program 2)
- Charles House (Program 2)
- Child Care Services Association of Chapel Hill (Program 2)
- Club Nova (Program 1 and 2)
- Community Nutrition Partnership (Program 2)
- Friends of the DSS (Program 1)
- Human Rights Center of Carrboro and Chapel Hill (Program 1)
- IFC (Program 2)
- Meals on Wheels of Chapel Hill (Program 2)
- PORCH (Program 1 and 2)
- TABLE (Program 1 and 2)

Program 1 (Donation Stations) operate regularly at the following farmers' markets in Orange County:

- Carrboro Farmers' Market
- Chapel Hill Farmers' Market
- Eno River Farmers' Market
- Hillsborough Farmers' Market
- Southern Village Farmers' Market

Additionally, Program 1 and Program 2 partner with a community of over 200 farmers from the farmers' markets and other beginning/new farmers - not all of which are Orange County based- to provide food purchased at wholesale and food donated at market.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

(Both Programs 1 and 2)

We work with a range of agencies across the county, which distribute the fresh food we connect them with to a diverse demographic. We intentionally partner with agencies that support the most urgent hunger and lowest income populations. We annually verify the demographics our partner agencies serve, and work to ensure that the voices of our clients are heard and represented in our program planning. We are a community owned and operated group – and we believe that is the key to our continued presence in the community.

When sourcing food from local farmers, we are also intentionally diverse. We work with farmers who have been left out of "the system", specifically with USDA defined "Limited Resource, Socially Disadvantaged and Beginning" farmers. These are farmers that are not eligible for traditional farm support and subsidies, yet who produce an enormous amount of healthy food in our communities. We believe that it is important to help both farmers who have been left out of the system, as well as individuals and agencies that do not have access to resources. We believe that if we can introduce these groups to one another – the farmers, the agencies, and the individual recipients, that the Orange County network of community services and relationships will be strengthened. So far, we have seen this to be the case – where farmers who formerly knew nothing about hunger in our county, suddenly began growing food to donate. Other farmers provide special items at a deep discount, because they know it will go to help feed the children at TABLE, or the mentally ill adults at Club Nova. And most partner agencies that want to buy additional fresh food begin to buy from local farmers and keep their dollars in county.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition	X	X	X	X
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program 1 Goals (Donation Station)	Program Activities	Actual Results for FY 13-14	Evaluation Method
Ensure that fresh produce is regularly purchased and collected to donate from local farmers' markets	Donation Stations are able to operate successfully every week, collecting donations of fresh produce and spending cash donations on produce at local markets. Specific activities pursued: 1. Appropriate level of volunteers are trained and recruited by staff and volunteer network 2. Donation Station supplies are well stocked and in good condition Advanced meetings between Market managers and Agency representatives have taken place, and roles and responsibilities agreed upon	1. $14,100.21 in donations spent at Orange County farmers markets, in increase from $11,410 in spending the previous year. 2. Stations operated at Orange County markets every week that markets ran, including an added mid-week market at the Chapel Hill Farmers Market.	Verify weekly records kept at donation Station that produce was collected and purchased with cash donations. Report back to market managers and out to the community. Compare contribution amounts annually with those of previous years.
Ensure that the pantries and social service agencies have access to a regular and consistent supply of healthy, local food to their clients	With volunteer and staff coordination, an agency representative regularly comes to their local market to pick up fresh food donations collected at the weekly Donation Station. Agency communicates about types and quantities of produce most needed.	Fresh food was consistently integrated into local pantry and social service agency distribution, where it was received by low-income community members at risk for hunger through the Human Rights Center (51 weeks), TABLE (30 weeks), Homestart (20 weeks), Club Nova (51 weeks), Amigas en Salud (20 weeks), Friends of the DSS (51 weeks) and Central Elementary families (40 weeks).	Donation Station Coordinator follows up regularly with agencies to ensure smooth handoff of produce, verify distribution and use by agency, and collect feedback and stories from produce.

Increase capacity of Agency to handle fresh produce and recipients to use produce.	1. Make produce storage, usage, and recipes available to agency partners Verify that agency has appropriate storage facilities, or help agency increase storage capacity.	Cooking demos or informational recipes and fact sheets were provided for every Donation Station recipient this year. Community engagement events and regular check ins were put in place to ensure consistent feedback.	Have agency representative and agency recipients (when possible) provide feedback, both anecdotally and through surveys, to determine what has helped and what could be improved.
Stated Program 2 Goals (Farm to Pantry)	**Program Activities**	**Actual Results for FY 13-14**	**Evaluation Method**
Increase the healthfulness of pantry and social services agencies food outreach	1. Assess their fresh food needs and current budget. 2. Create a personalized "menu" of food items. 3. Find a local (preferably Orange County, or a farm that sells food at an Orange County Farmers Market) farm or mix of farms that can supply this pantry. 4. If the pantry has funds to "match", that is the first and best option, as it will stretch the dollars furthest. If they do not, then we can provide funds directly. Coordinate the order and delivery of fresh produce form the farm to pantry through the POP Market	A regular flow of farm fresh food goes to partner pantries and agencies, increasing the health of some of the county's most vulnerable residents. Last year total agency spending amounted to $36,378. This year saw $82,490 in total spending, a 227% increase.	Compare the amount of fresh food being used by the agency before participating in the Farm to Pantry program and the amount of fresh food being used by the agency during the Farm to Pantry program.
Strengthen local producer market	Purchase food through local farmers using our POP Food Market (access-oriented small scale food aggregator) to find the right farm/food for partner agencies.	We spent $4278 dollars in Orange County grant funding to incentivize increased buying, resulting in an overall increase from $31,607 to $70,279 spent with local farmers last year an increase of 222%.	Check records at the end of the project to measure new dollars spent with local farmers.
Increase capacity of Agency to handle fresh produce and recipients to use produce.	1. Make produce storage, usage, and recipes available to agency partners through our Food Ambassadors program Verify that agency has appropriate storage facilities, or help agency increase storage capacity.	End of year surveys could not be completed with every individual due to limitations of agency tracking. We did complete surveys with each agency, and when possible with individuals through conversation.	Use evaluations to have recipients self assess their comfort with fresh food. Report resources that have been shared with agencies.

Agency partners make a policy change to incorporate more fresh food in their programming	We create an advanced agreement with agency partners that they will continue to support fresh food after the initial funding is spent. Agency partners work with us to secure new funding for continued provision of fresh food from family farms in their programs, or allocate existing funds within their budgets for fresh food.	Each agency commits to adding fresh food into their programs at an increased level of that prior to their participation in the Farm to Pantry program. Last year total agency spending amounted to $36,378. This year saw $82,490 in total spending, a 227% increase.	Compare the amount of fresh food being used by the agency before participating in the Farm to Pantry program and the amount of fresh food being used by the agency after the initial funds from Farm to Pantry program have ended.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program 1 Goals (Donation Stations)	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Ensure that fresh produce is regularly purchased and collected to donate from local farmers' markets	Donation Stations are able to operate successfully every week, collecting donations of fresh produce and spending cash donations on produce at local markets. Specific activities pursued: 1. Appropriate level of volunteers are trained and recruited by staff and volunteer network 2. Donation Station supplies are well stocked and in good condition 3. Advanced meetings between Market managers and Agency representatives have taken place, and roles and responsibilities agreed upon	1. Increase dollars spent at local farmers' market, strengthening local producer markets 2. Increase awareness of local need amongst the Farmers market community	Verify weekly records kept at donation Station that produce was collected and purchased with cash donations. Report back to market managers and out to the community. Compare contribution amounts annually with those of previous years.
Ensure that the pantries and social service agencies have access to a regular and consistent supply of healthy, local food to their clients	With volunteer and staff coordination, an agency representative regularly comes to their local market to pick up fresh food donations collected at the weekly Donation Station. Agency communicates about types and quantities of produce most needed.	Fresh food is consistently integrated into local pantry and social service agency distribution, where it is received by low-income community members at risk for hunger.	Donation Station Coordinator follows up regularly with agencies to ensure smooth handoff of produce, verify distribution and use by agency, and collect feedback and stories from produce.
Increase capacity of Agency to handle fresh produce and recipients to use produce.	1. Make produce storage, usage, and recipes available to agency partners 2. Verify that agency has appropriate storage facilities, or help agency increase storage	Fresh food will be safely and successfully integrated into food distribution; recipients will have success using and enjoying produce.	Have agency representative and agency recipients (when possible) provide feedback, both anecdotally and through surveys, to determine what has helped and what could be improved.

	capacity.		
Stated Program 2 Goals (Farm to Pantry)	**Program Activities**	**Anticipated Results for FY 14-15**	**Evaluation Method**
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Increase the healthfulness of pantry and social services agencies food outreach	1. Assess their fresh food needs and current budget. 2. Create a personalized "menu" of food items. 3. Find a local (preferably Orange County, or a farm that sells food at an Orange County Farmers Market) farm or mix of farms that can supply this pantry. 4. If the pantry has funds to "match", that is the first and best option, as it will stretch the dollars furthest. If they do not, then we can provide funds directly. 5. Coordinate the order and delivery of fresh produce form the farm to pantry through the POP Market	A regular flow of farm fresh food goes to partner pantries and agencies, increasing the health of some of the county's most vulnerable residents.	Compare the amount of fresh food being used by the agency before participating in the Farm to Pantry program and the amount of fresh food being used by the agency during the Farm to Pantry program.
Strengthen local producer market	Purchase food through local farmers using our POP Food Market (access-oriented small scale food aggregator) to find the right farm/food for partner agencies.	Increase the economic health of some of the county's most vulnerable local businesses.	Check records at the end of the project to measure new dollars spent with local farmers.
Increase capacity of Agency to handle fresh produce and recipients to use produce.	1. Make produce storage, usage, and recipes available to agency partners through our Food Ambassadors program Verify that agency has appropriate storage facilities, or help agency increase storage capacity.	Fresh food will be safely and successfully integrated into food distribution; recipients will have success using and enjoying produce.	Use evaluations to have recipients self assess their comfort with fresh food. Report resources that have been shared with agencies.

Agency partners make a policy change to incorporate more fresh food in their programming	We create an advanced agreement with agency partners that they will continue to support fresh food after the initial funding is spent. Agency partners work with us to secure new funding for continued provision of fresh food from family farms in their programs, or allocate existing funds within their budgets for fresh food.	Each agency commits to adding fresh food into their programs at an increased level of that prior to their participation in the Farm to Pantry program.	Compare the amount of fresh food being used by the agency before participating in the Farm to Pantry program and the amount of fresh food being used by the agency after the initial funds from Farm to Pantry program have ended.

Section III. Program Information

AGENCY NAME: **Farmer Foodshare**
Program 1 Budget Worksheet

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$19,300	$19,400	$20,000	3%
Program Generated Revenue (fees)	$-	$-	$2,050	0
Local Government Grants:				
Orange County	$2,000	$5,000	$5,000	0%
Town of Chapel Hill	$1,000	$5,000	$5,000	0%
Town of Carrboro	$1,000	$5,000	$5,000	0%
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Private Foundation	$25,000	$10,000	$10,000	0%
Other Grants:				0
Miscellaneous/Other Revenue		$10,000	$10,500	5%
Please list 3 largest Miscellanous sources:				
sponsorships and business support $-		$10,000	$10,500	
Total Program Revenue	**$ 48,300**	**$ 54,400**	**$ 57,550**	**6%**
PROGRAM EXPENSES				
Compensation	$33,971	$37,500	$40,000	7%
Rent & Utilities	$1,800	$2,500	$2,500	0%
Supplies & Equipment	$5,995	$6,000	$6,000	0%
Travel & Training	$4,212	$5,500	$6,000	9%
Other Expenses:	$2,300	$2,900	$3,050	5%
Please list 3 largest "Other Expenses":				
Bookkeeping $-	$1,000	$1,200	$1,300	
Insurance $-	$850	$950	$1,000	
Volunteer recognition $-	$450	$750	$750	
Total Program Expenses	**$ 48,278**	**$ 54,400**	**$ 57,550**	**6%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$22**	**$-**	**$-**	**0**

Section III. Program Information
Program 2 Budget Worksheet

AGENCY NAME: **Farmer Foodshare**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)	$2,000	$2,500	$2,500	0%
Local Government Grants:				
Orange County	$3,000	$5,000	$5,000	0%
Town of Chapel Hill	$-	$-	$-	0
Town of Carrboro	$-	$-	$-	0
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:	$14,000	$15,000	$15,000	0%
Other Grants:				0
Miscellaneous/Other Revenue	$-	$-	$-	0
Total Program Revenue	**$ 19,000**	**$ 22,500**	**$ 22,500**	**0%**
PROGRAM EXPENSES				
Compensation	$2,000	$2,100	$2,200	5%
Rent & Utilities	$2,400	$2,500	$2,600	4%
Supplies & Equipment	$1,500	$1,500	$1,500	0%
Travel & Training	$1,000	$1,000	$1,000	0%
Other Expenses:	$12,000	$15,000	$15,000	0%
Matching grants for partners	$12,000	$15,000	$15,000	
Total Program Expenses	**$ 18,900**	**$ 22,100**	**$ 22,300**	**1%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$100**	**$400**	**$200**	**-50%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Program 1 unit of service**[+]: A Donation Station operating on a weekly basis during the farmers' market season (an average of 40 weeks per year).

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	24 Donation Stations	24 Donation Stations	48,278	$2011
Estimated FY14-15	28 Donation Stations	28 Donation Stations	$54,400	$1943
Projected FY15-16	35 Donation Stations	35 Donation Stations	$57,550	$1644

2. **Program 2 unit of service**[+]: One agency that serves people at risk of hunger provides fresh food in their distribution 50% of the time they serve clients.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	15 Agencies	15 Agencies	$18900	$1260 (This is agency wide over the course of the year. Per person cost averages ~$1.00 per person per distribution.)
Estimated FY14-15	20 Agencies total (Increased to 9 Orange County agencies)	20 agencies	$22100	$1105 (This is agency wide over the course of the year. Per person cost averages ~$1.00 per person per distribution.)
Projected FY16-17	25 Agencies total (Increased to 12 Orange County agencies)	25 agencies	$22300	$892 (This is agency wide over the course of the year. Per person cost averages ~$1.00 per person per distribution.)

Section V: Program Beneficiary Demographics

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Donation Stations, Program 1

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	7040	7750	9300	Durham City	X	X	X
Female	14960	17000	20700	Durham County	X	X	X
2. **Ethnicity**				Raleigh City	X	X	X
African-American	9900	11250	13500	Wake County	X	X	X
Caucasian	5940	6750	12000	Town of Chapel Hill	X	X	X
Hispanic	5060	5750	6900	Town of Carrboro	X	X	X
Other	1100	1250	1500	Orange County	X	X	X
3. **Age**				Other (specify)	Chatham, Guilford, Mecklenburg, Cleveland, and Person Counties	Watagua, Rockingham, Buncom, Forsyth, in addition to previous counties	Previously mentioned counties
0-5 Years	220	250	300				
6-18 Years	5940	6750	8100	Per cent of clients at, or below, federal poverty level	83%	85%	85%
19-50 Years	14520	16500	19800				
51+ Years	1540	1750	2100				
Unknown				***TOTAL # OF CLIENTS SERVED***	22,000	25000	30000

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Farm to Pantry, Program 2

Client characteristics	Actual 2013- 14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013- 14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	2986	3237	3561	Durham City	X	X	X
Female	5348	6013	6614	Durham County	X	X	X
2. **Ethnicity**				Raleigh City	X	X	X
African-American	3917	4348	4782	Wake County	X	X	X
Caucasian	1666	1850	2035	Town of Chapel Hill	X	X	X
Hispanic	1917	2127	2339	Town of Carrboro	X	X	X
Other	833	925	1018	Orange County	X	X	X
3. **Age**				Other (specify)	Chatham County	Chatham County	Chatham County
0-5 Years		2000	2200				
6-18 Years	1559	2000	2200	Per cent of clients at, or below, federal poverty level	95%	95%	95%
19-50 Years	3025	5050	5555				
51+ Years		200	220				
Unknown	3750			***TOTAL # OF CLIENTS SERVED***	8334	9250	10200

Comparative Budget for Entire Agency

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Farmer Foodshare**

AGENCY REVENUE		Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations		$61,425	$70,000	$80,000	14%
Agency Generated Revenue (fees)		$14,531	$18,000	$30,000	67%
Local Government Grants:					
Orange County		$5,000	$10,000	$10,000	0%
Town of Chapel Hill		$-	$5,000	$5,000	0%
Town of Carrboro		$-	$5,000	$5,000	0%
Other Local:	Durham County	$-	$-		0
	If more than 3 sources, please provide a separate list.				
Non-Local Government Grants					
Triangle United Way		$-	$-		0
State Government		$-	$25,000		-100%
Federal Government		$-	$5,000	$17,000	240%
Miscellaneous/Other Revenue		$359,822	$305,000	$305,000	0%
Please list 3 largest Miscellanous sources:					
Foundation Grants	$-	$238,953	$150,000	$130,000	
In Kind Donations	$-	$70,150	$80,000	$90,000	
Corporate Donations	$-	$50,719	$75,000	$85,000	
Total Agency Revenue		**$ 440,778**	**$ 443,000**	**$ 452,000**	**2%**
AGENCY EXPENSES					

Compensation		$216,237	$225,000	$230,000	2%
Rent & Utilities		$21,889	$22,000	$22,000	0%
Supplies & Equipment		$13,775	$14,000	$15,000	7%
Travel & Training		$13,533	$14,500	$15,000	3%
Other Expenses:		$161,593	$165,000	$170,000	3%
Please list 3 largest "Other Expenses":					
Food Purchases	$66,736		$65,000	$65,000	
professional services	$23,146		$15,000	$15,000	
In Kind Donations	$70,150		$80,000	$90,000	
Total Agency Expenses		**$ 427,027**	**$ 440,500**	**$ 452,000**	**3%**
SURPLUS/(DEFICIT) FOR PERIOD:		**$13,751**	**$2,500**		**$-**

Section VII: Schedule of Positions

Agency Name: Farmer Foodshare

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual ** 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1	10% (P1), 10% (P2)	55,000	55,000	56,000	16%	R,H

Community Relations Manager	1	10% P1, 5% P2	39,000	39,000	39,000	11.4%	R,H
Donation Station Manager	.75	100% P1	25,400	34,000	34,000	9.9%	R,H
POP Market Manager	1	100% P2	35,000	33,000	33,000	9.6%	R,H
POP Market Assistant	.25	100% P2	6,775	12,480	12,480	2%	R
Donation Station Intern	.2	100% P1	N/A	N/A	N/A	N/A	N/A
Donation Station Intern	.2	100% P1	N/A	N/A	N/A	N/A	N/A
POP Market Intern	.2	100% P2	N/A	N/A	N/A	N/A	N/A
Volunteer Hours (~200 people)	3.25	95% P1, 5% P2	N/A	N/A	N/A	N/A	N/A

** Does not include fringe, base salary only.

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Freedom House Recovery Center, Inc.

Street Address: 104 New Stateside Drive Chapel Hill, NC 27516

Mailing Address: 104 New Stateside Drive Chapel Hill, NC 27516

Website Address: www.freedomhouserecovery.org

Executive Director: Patricia E. Hussey

Telephone: 919-942-2803 E-Mail: Trish.h@fhrecovery.org

Contact Person: Anne-Marie Vanaman

Telephone: 919-942-2803 E-Mail: Annemarie.v@fhrecovery.org

Fax: 919-942-2126 Federal ID Number: 56-1082674

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$29,000	$30,000
Summary of intended use of funds: *We are asking for funding from the Orange County Government to support the day-to-day services in (1) our residential rehab programs, and (2) to support the Facility Based Crisis and Detox Center.*		
Town of Chapel Hill	$17,000	$18,000
Summary of intended use of funds: *We are requesting funding from the Town of Chapel Hill to support day-to-day residential programming needs (i.e. staffing, facility costs, supplies and equipment) in the Alvis Women's House and Men's Transitional House.*		
Town of Carrboro	$8,000	$9,000
Summary of intended use of funds: *We are asking support from the Town of Carrboro for day-to-day services in the Alvis and Men's Halfway Houses. These funds will be used to help support: (1) facility costs, and (2) patient/client supplies (educational and non-prescription medical supplies).*		

Executive Director

1/22/2015
Date

Board Chair

1/22/2015
Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 1974

   b. Years in Operation: 41

   c. Mission or Vision Statement (if applicable):
   Our mission is to promote, enhance and support recovery for men, women and children affected by substance abuse and mental illness by using a holistic, person-centered approach. Our expertise and broad array of treatment services stabilize, nurture and enhance the personal growth and development of those we serve so that they can recover to live rich, full lives.

Brief History of Agency:

Since 1974, our mission, "*to promote, enhance, and support recovery from the diseases of addiction and mental illness*" reflects our commitment to a person-centered, strength-based approach to services, and our dedication to the enhancement of personal growth and development of all those we serve. Our philosophy is one of respect for and recognition of the individuality of each person in our programs. For instance, LifeSkills Education, our community intervention program, addresses the full-range of needs that people bring with them as they enter treatment, such as issues of recovery, education, vocation and housing.

Freedom House Recovery Center has consistently grown to address the critical and changing community needs of those affected by addiction and mental illness by expanding our services through innovative programs and partnerships. Through continued collaboration with community agencies and families, we work to ensure that people remain in their communities.

Currently our services include detoxification, mobile crisis management and facility-based crisis services, short and long-term residential rehabilitation/halfway houses, intensive outpatient, aftercare, psychiatric evaluation and medication management, integrated primary health care, and community intervention support. We serve clients of all ages, regardless of their ability to pay.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

   Nearly a million people have addiction problems in North Carolina and three times as many are affected by another person's drinking and drug use. This ripple effect can

negatively affect the mental, physical and financial health of families struggling to cope with and care for a loved one with an addiction and/or mental illness.

Thousands of people in Orange County are touched by the diseases of alcoholism, drug addiction, and mental illness. There are more than 59,572 adolescent and adult residents are affected by alcohol drug abuse/addiction (Alcohol/Drug Council of NC). Substance abuse costs Orange County residents over $195 million every year. Additionally, mental illness afflicts 24% of North Carolina's population and costs the state $4.8 billion (28,000 of these are Orange County residents).

According to County Health Rankings and Roadmaps, Orange County citizens report 3.1 poor mental health days per month and 16% report they drink excessively, higher than the state average (University of Wisconsin Population Health Institute). North Carolina has a goal to reduce the number of poor mental health days to 2.8 per month by 2020 (Healthy NC 2020).

The last several years have been devastating for low-income North Carolinians in need of health care, especially those suffering from mental illness and /or substance addiction. As communities and agencies work to provide the best care for the mentally ill and addicted, as well as work toward improved health outcomes at the county and state level, the NC Mental Health system continues to be in transition. Two landmark decisions were made recently that impacted our agency, (1) the Governor's Office refused a large percentage of the Medicaid matching expansion funding from the Federal Government, and (2) the Federal government slashed block grant funding by more than 10% (funding that impacts programs for women, including crisis services.)

Although the state has a goal to reduce the rate of mental-health visits to emergency departments by 2020, reduced funding levels have led to fewer services for this vulnerable population and in turn to crowded emergency rooms. Recently, the Centers for Disease Control reported that nearly 10% of all Emergency Department visits in North Carolina list mental illness as a diagnosis. The national average is 5%.

Research shows that substance abuse is directly connected with indigence, unemployment, adolescent pregnancy, school dropout, crime, chronic illness and death. Freedom House breaks this downward spiral by providing these people with help and hope through our treatment services.

#1 ***Chapel Hill Residential Rehab Programs***. Freedom House addresses the above community needs and works to provide effective, economical community services that break the cycle of poverty, addiction and illness by providing residential rehab treatment to men and women whose addiction and/or mental illness have left them homeless, disenfranchised, and without work. In FY 2013-2014 this program served 112 individuals. This long- term treatment program has given the support needed for these men and women to find strong recovery and re-enter their lives with jobs and housing, and more importantly, with a sustaining recovery from addiction and/or mental illness.

#2. ***Facility-Based Crisis and Detox Program***. This program is generally the first step toward wellness and recovery for people, and it meets the community's need for immediate response to crises for over 2,186 men and women over the age of 18 in

FY2013-2014. Instead of going to the local Emergency Department or being incarcerated, crisis services provide the urgent treatment needed. During a stay in the crisis/detox unit, our doctors, nurses, and clinicians are able to assess the person's needs, and make thoughtful and informed decisions, together with the individual, as to the next step in their treatment. This process has reduced the number of recidivists into the treatment field significantly.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

The NC Mental Health system continues to be in transition, and is heading toward a system where 3 MCOs will be overseeing the resources for the entire State. Our Orange County services are now under Cardinal Innovations MCO, who partnered with 2 additional LMEs to become one of the largest Managed Care Organizations in the State. Two landmark decisions were made recently that impacted our agency and all others as well, (1) the Governor's Office refused a large percentage of the Medicaid matching expansion funding from the Federal Government, and (2) the Federal government slashed block grant funding by more than 10% (funding that impacts programs for women, including crisis services).

On the plus side, Cardinal Innovations MCO awarded Freedom House Outpatient Clinic programs the Community Comprehensive Clinic (CCC) status in Orange and Person counties with higher service rates for psychiatric services, and this will help make outpatient services to the many indigent clients we serve more sustainable. We also moved to an Open Access Model of care in the outpatient clinic and crisis walk-in programs, which necessitated the hiring of additional psychiatric and clinical staff.

Our licensed halfway houses are funded at a very low State rate that does not cover the cost of running the programs, making it difficult to sustain these critical treatment/housing programs which have a higher rate of success than other programs in the state and nation.

We have joined with UNC Hospitals in a partnership project grant that provides additional, much needed crisis funding, as we support a smooth transition of clients from the hospital into the crisis unit, where they are then case managed to a strong continuum of care and rates of ED usage are reduced. Other service expansions to meet the needs in our community include expanded outpatient services for children and adolescents.

Continued change and transition has challenged our agency to strive for successful outcomes for people through incorporation of Integrated Care, Evidence Based Practices and creative, holistic approaches to care. Our goal for 2015-2016 is to continue to focus on strengthening of our comprehensive array of services in order to meet the increased need in our community for mental health and substance abuse treatment services.

Our board continues to focus on raising the remainder of the cost to pay for the Crisis and Detox facility that was built in 2009. In 2014, this mortgage was refinanced to a

more favorable term, and with continued fundraising efforts, we will work to have this mortgage paid off in the near future.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

   A. ***Residential Rehab Programs (CH Men's House and Maggie Alvis Women's House)*** – Most of the funding for these programs comes from (1) the NC Division of Mental Health, Developmental Disability, and Substance Abuse State IPRS dollars. We also receive the following funding: (2) Orange Vocational Rehab support for individual residents, (3) minimal room and board payments from those residents who have found jobs and are working. This service is not a Medicaid billable service, so there are no funds from that source, (4) United Way of the Greater Triangle also supports these programs, and (5) we receive much needed funding from the County of Orange and Towns of Chapel Hill and Carrboro, through this grant process. Funding sources 1 through 4 are firm for the upcoming fiscal year, unless the Federal and State governments make additional cuts in funding. We hope that we will also receive continued funding from the County of Orange and Towns of Chapel Hill and Carrboro. We were able to meet budget with the above supports this year and last year, and hopefully we will be successful in meeting this goal in the upcoming fiscal year of 2015-16 as well.

   B. ***Facility Based Crisis and Detox services*** are historically underfunded by State IPRS dollars, as well as Medicaid. The requirements of the Service Definitions that oversee these types of licensed programs exceed the billing rate for the service. We have been able historically to meet budget with the various funding sources, including grants, public donations, funding from County of Orange, Towns of Chapel Hill and Carrboro, and even minimal third party payment (private insurance). Funding is tight for crisis services, and every dollar we receive is critical in maintaining crisis services.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

   Collaboration within our community is a high priority to us as it enhances the services that we are able to provide to our clients, and we have been fortunate to build strong relationships with many community agencies. We have a long history of working closely with OPC COC (Cardinal Innovations), DSS, TASC, the Courts, and Vocational Rehabilitation, as well as El Futuro, Alcoholics and Narcotics Anonymous, Orange Comprehensive Health Services, Orange County Health Department, Red Cross, Alternative Sentencing, Orange County Literacy Council, IFC, Orange Chatham Justice Partnership, UNC Hospitals, Food Bank, Rape Crisis, the Compass Center, and the Police and Sheriff's Departments. Collaboration strengthens opportunities for individuals that we serve to build a strong connection with the community that will create a bridge to wellness and recovery. Some of our collaboration efforts include:

   - **Job Links and the Orange site of Durham Community College:** to help individuals with their GED.
   - **Orange Vocational Rehabilitation:** to provide job trainings skills.

- **Orange County Health Department and Carolina Health Net:** to refer indigent clients to a medical home, as well as to provide primary health care to indigent clients within our Freedom House Integrated Care Clinic.
- **Local police and Sheriff's departments CIT (Community Intervention Training)** project: to train law officers to understand more fully how to work with individuals in our community who are chronically mentally ill or addicted.
- **Orange Rape Crisis:** to provide the needed support for women who come to us with recent and historical sexual abuse.
- **UNC Hospitals:** to provide integrated care for patients with mental illness and/or substance abuse disorders who are in need of continued recovery treatment and care. The goals of the partnership are: (1) to provide continuity of care and improved outcomes for patients, including low-income and indigent patients and reduce ED usage and readmission rates at UNC Hospitals.
- **Community Care of North Carolina:** work closely with CCNC to become a designated Access to Care Clinic for low-income and indigent individuals and families.
- **Interfaith Council:** to provide behavioral health care to their homeless clients.
- **Interfaith Food Shuttle:** to provide fresh and healthy food for our residential clients.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Last year, Freedom House served more clients and more than 56% of the 10,454 clients served at Freedom House were minorities. We have a strong commitment to diversity and value the differences in the individuals we serve, and are committed to an emphasis of racial and cultural diversity in (1) the development of programming, (2) staff training, and (3) the assurance that staff makeup reflects the cultural and ethnic makeup of our program community. All staff are required to attend cultural sensitivity trainings. Our staff includes seven bilingual counselors, all either licensed or certified. We provide Spanish-language materials; community outreach to referral sources; and Spanish-language individual and group treatment. In addition, we contract with an Interpreting Service that provides bi-lingual clinicians when needed. We partner with OPC COC to provide treatment services to the Burmese immigrants who live in our community. Our Consumer Advisory Committee has a diverse membership. In house client rights meetings, house governance, client forums, and satisfaction surveys are ways that client voices are heard. We value their input.

Minority Clients served in FY2013-2014 in all Freedom House Programs:

Race/Ethnicity	Total
African American	5,372
Hispanic	352
Asian	37
Native American	14
Other-Bi-Racial/Burmese	79
Total	**5,854**

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X	X	X
Health and Nutrition	X	X	X	X
Job Training		X	X	
Sports and Arts Activities	X	X	X	
Pre-School Activities				
After-School Activities				
Mentoring	X	X	X	X
Transportation	X	X	X	X
Housing		X	X	
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.
Program Name: Chapel Hill Residential Rehab Programs

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
95 men and women will receive long-term (3-6 months) recovery and community support services	Staff worked with stakeholders and community partners (UNC Hospitals, OPC LME, the Court system, Drug Treatment Court, Family Court, IFC shelter, etc.) to identify referrals for individuals in our community who need long-term halfway house services.	We provided services to 112 men and women and maintained a 98% utilization rate in our Halfway Houses in Chapel Hill.*	We evaluated outcomes using the NCTOPPS tool and AlphaFlex EMR software to track outcomes electronically.
70% of all clients will graduate from the program and re-enter the community and/or family.	Staff developed a Person-Centered Plan for each individual, with a goal of self-sufficiency and sobriety upon graduation.	72% of clients graduated from the program, another 10% successfully discharged to ADATC or other appropriate level of care.	Clinical staff regularly monitored the case planning activities of each client during their stay in the program.
54% of clients who graduate will secure housing upon discharge.	Staff developed a Person-Centered Plan for each individual, with a goal of self-sufficiency and sobriety upon graduation.	54% of clients who graduated secured housing upon discharge.	Follow up surveys and a 3-month follow-up plan were used to gain this information regarding housing.
55% of clients will find employment while in our programs.	Staff developed a Person-Centered Plan for each individual, with a goal of self-sufficiency and sobriety upon graduation.	65% of clients will find paid employment while in our programs.	Stable employment was measured through participants' attainment of paid employment.

If program(s) did not meet its stated goal(s), please explain:

* The number served during FY13-14 was higher than normal as we were looking to care for shorter term residents who were working to remain stable while waiting for much longer-term permanent housing. This is a population that will often relapse during times of waiting for services.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
98 men and women will receive long-term (3-6 months) recovery and community support services	Staff will work with stakeholders and community partners (UNC Hospitals, OPC LME, the Court system, Drug Treatment Court, Family Court, IFC shelter, etc.) to identify referrals for individuals in our community who need long-term halfway house services.	We anticipate providing services to 98 men and women and maintaining a 98% utilization rate in our Halfway Houses in Chapel Hill.	We will evaluate outcomes using the NCTOPPS tool and AlphaFlex EMR software to track outcomes electronically.
79% of all clients will graduate from the program and re-enter the community and/or family.	Staff will develop a Person-Centered Plan for each individual, with a goal of self-sufficiency and sobriety upon graduation.	Of the 79% of clients who graduate from the program, another 10% will successfully discharge to ADATC or other appropriate level of care.	Clinical staff will regularly monitor the case planning activities of each client during their stay in the program.
60% of clients who graduate will secure housing upon discharge.	Staff will develop a Person-Centered Plan for each individual, with a goal of self-sufficiency and sobriety upon graduation.	60% of clients who graduate will secure housing upon discharge.	Follow up surveys and a 3-month follow-up plan were used to gain this information regarding housing.
65% of clients will find employment while in our programs.	Staff will develop a Person-Centered Plan for each individual, with a goal of self-sufficiency and sobriety upon graduation.	65% of clients will find paid employment while in our programs.	Stable employment will be measured through participants' attainment of paid employment.

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Program Name: Chapel Hill Facility-Based Crisis and Detox Program

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Provide services to 2,000 men and women in need of addiction and mental health treatment, in order to break the cycle of addicted behavior.	Crisis Unit provided services during the fiscal year to all referrals from the community that meet admission criteria for this service.	We served 2,186 clients in Crisis Unit in FY13-14.	We used our electronic medical record system to track these numbers.
Provide treatment planning to refer 100% of those served to the next appropriate level of care.	Crisis staff will begin discharge planning with each client in the crisis unit, using motivational interviewing techniques to incentivize clients to move into the next appropriate level of care.	Crisis Staff provided treatment and discharge planning for 100% of all clients served in the crisis unit. 85% of these clients in the next level of care as referred.	We tracked this information and flow of client services using our AlphaFlex electronic medical record system.
Divert 86% of those referred to the crisis unit from our local hospital emergency rooms and expensive State hospitals.	Freedom House Crisis Care Coordinators worked with UNC ER staff, individuals, and our doctors and clinicians to admit difficult cases into the crisis unit, diverting them from the local or State hospitals.	Our diversion rate during fiscal year 2013-14 was 88%. Diverting referrals to our local crisis unit instead of high cost State and local hospitals, not only saves money, but it also provides a stronger continuum of care for individuals as they discharge from the crisis unit and into longer term care.	Care Coordinators tracked all referrals and their outcomes using a "referral tracking log".

If program(s) did not meet its stated goal(s), please explain:

FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.
Program Name: Chapel Hill Facility-Based Crisis and Detox Program

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Provide services to 2,050 men and women in need of addiction and mental health treatment, in order to break the cycle of addicted behavior.	Crisis Unit will provide services during the fiscal year to all referrals from the community that meet admission criteria for this service.	We anticipate seeing an increase from the previous fiscal year in clients served in our Crisis Unit in FY15-16.	We will use our electronic medical record system to track these numbers.
Provide treatment planning to refer 100% of those served to the next appropriate level of care.	Crisis staff will begin discharge planning with each client in the crisis unit, using motivational interviewing techniques to incentivize clients to move into the next appropriate level of care.	Crisis Staff will provide treatment and discharge planning for 100% of all clients served in the crisis unit. We anticipate seeing 85% of these clients in the next level of care as referred.	We will track this information and flow of client services using our AlphaFlex electronic medical record system.
Divert 88% of those referred to the crisis unit from our local hospital emergency rooms and expensive State hospitals.	Freedom House Crisis Care Coordinators will work with UNC ER staff, individuals, and our doctors and clinicians to admit difficult cases into the crisis unit, diverting them from the local or State hospitals.	We anticipate maintaining this rate at 88% as our partnership with UNC Hospitals continues. Diverting referrals to our local crisis unit instead of high cost State and local hospitals, not only saves money, but it also provides a stronger continuum of care for individuals as they discharge from the crisis unit and into longer term care.	Care Coordinators will track all referrals and their outcomes using a "referral tracking log".

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Freedom House Recovery Center Chapel Hill Residential Rehab Programs**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 4,478	$ 10,000	$ 10,500	5%
Program Generated Revenue (fees)	$ 24,110	$ 32,500	$ 33,000	2%
Local Government Grants:				
Orange County	$ 14,500	$ 14,500	$ 15,000	3%
Town of Chapel Hill	$ 6,000	$ 12,000	$ 12,000	0%
Town of Carrboro	$ 5,000	$ 5,000	$ 5,000	0%
Other Local: Cardinal Innovations	$ 232,252	$ 184,655	$ 187,890	2%
Other Local: CASP Funding	$ 125,440	$ 125,400	$ 125,400	0%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 20,407	$ 23,220	$ 23,200	0%
Community Churches		$ 6,300	$ 6,800	8%
Local Foundations		$ 6,500	$ 6,500	0%
Other Grants: Duke DGIN grant		$ 5,000	$ 5,000	0%
Other				0
Miscellaneous/Other Revenue		$ 24,000	$ 24,500	2%
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 432,187**	**$ 449,075**	**$ 454,790**	**1%**
PROGRAM EXPENSES				
Compensation	$ 257,943	$ 273,904	$ 278,064	2%
Rent & Utilities	$ 19,802	$ 19,951	$ 18,900	-5%
Supplies & Equipment	$ 121,830	$ 124,200	$ 126,800	2%
Travel & Training	$ 16,500	$ 14,360	$ 14,426	0%
Other Expenses:	$ 16,112	$ 16,660	$ 16,600	0%
Please list 3 largest "Other Expenses":				
Insurance and Bonding $ 4,499.00				
Interest $ 7,110.00				
License Fees $ 2,503.00				
Total Program Expenses	**$ 432,187**	**$ 449,075**	**$ 454,790**	**1%**
SURPLUS/(DEFICIT) FOR PERIOD:	$ -	$ -	$ -	0

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Freedom House Recovery Center Facility-Based Crisis & Detox Program**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 2,343	$ 14,000	$ 14,000	0%
Program Generated Revenue (fees)	$ 20,339	$ 63,500	$ 65,000	2%
Local Government Grants:				
Orange County	$ 14,500	$ 14,500	$ 15,000	3%
Town of Chapel Hill	$ 12,000	$ 12,200	$ 13,000	7%
Town of Carrboro	$ 3,000	$ 3,000	$ 4,000	33%
Other Local: Cardinal Innovations	$ 1,173,671	$ 1,298,500	$ 1,301,900	0%
Other Local: Sandhills LME	$ 78,330	$ 47,499	$ 47,500	0%
Other Local: Alliance MCO	$ 111,567	$ 49,600	$ 52,284	5%
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 14,900	$ 14,900	$ 14,900	0%
CASP	$ 350,000	$ 354,850	$ 352,700	-1%
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 1,780,650**	**$ 1,872,549**	**$ 1,880,284**	**0%**
PROGRAM EXPENSES				
Compensation	$ 1,569,423	$ 1,604,258	$ 1,612,164	0%
Rent & Utilities	$ 82,043	$ 82,850	$ 83,500	1%
Supplies & Equipment	$ 98,393	$ 98,700	$ 98,800	0%
Travel & Training	$ 8,400	$ 8,500	$ 8,700	2%
Other Expenses:	$ 80,605	$ 78,241	$ 77,120	-1%
Please list 3 largest "Other Expenses":				
Mortgage $ 80,605.00				
$ -				
$ -				
Total Program Expenses	**$ 1,838,864**	**$ 1,872,549**	**$ 1,880,284**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (58,214)**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: One unit of service in the residential Chapel Hill Residential Rehab Programs is bed day (24 hours of service).

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	7,600	7,265	$465,970	$64.14
Estimated FY14-15	7,600	7,288	$474,970	$64.84
Projected FY15-16	7,600	7,315	$484,060	$66.17

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

Define one unit of service[+]: One unit of service in the Facility-Based Crisis/Detox Program is a bed day (24 hours of service).

Defining a Unit of Service[+]

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	7,665	7,635	$1,709,400	$223.89
Estimated FY14-15	7,665	7,644	$1,814,900	$237.43
Projected FY15-16	7,665	7,652	$1,831,500	$239.35

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Chapel Hill Residential Rehab Programs

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	54	44	44	Durham City			
Female	58	54	55	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	54	45	46	Wake County			
Caucasian	45	46	46	Town of Chapel Hill	35	29	30
Hispanic	13	5	5	Town of Carrboro	29	26	26
Other		2	2	Orange County	37	32	32
3. **Age**				Other (specify)	11	11	11
0-5 Years							
6-18 Years	2	2	2	Per cent of clients at, or below, federal poverty level (Person, Chatham, Casewell, Alamance, Vance, Warren)	82%	77%	77%
19-50 Years	101	84	85				
51+ Years	9	12	12				
Unknown				***TOTAL # OF CLIENTS SERVED***	112	98	99

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Chapel Hill Facility-Based Crisis and Detox Programs

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	1,132	1,121	1,162	Durham City			
Female	1,054	929	1,063	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	1,086	1,018	1,132	Wake County			
Caucasian	1,069	1,002	1,051	Town of Chapel Hill	664	625	672
Hispanic	28	28	36	Town of Carrboro	679	635	685
Other	3	2	6	Orange County	724	680	744
3. **Age**				Other (Person, Chatham, Caswell, Alamance,Vance,Warren)	119	110	124
0-5 Years							
6-18 Years	36	32	43	Per cent of clients at, or below, federal poverty level	79%	78%	79%
19-50 Years	1,478	1,424	1,498				
51+ Years	672	594	684				
Unknown				***TOTAL # OF CLIENTS SERVED***	2,186	2,050	2,225

Section VI.

Comparative Budget for Entire Agency
(Excel file)

Agencies must still send a copy of the MS Excel file with their electronic application, even if they choose to embed the Excel table, on this page. The MS Excel file can be found here.

1. Please complete a Comparative Budget Excel Form **for the entire agency.** This budget form is required, even if the figures match the Program Budget Form(s).

2. If the agency's finances experienced significant changes that you would like to explain, please use the space below.

   You will see from the agency budget document that for the first time in many years, we had a significant deficit at the end of the year. Below are details that impacted this loss. Fortunately, we had built a reserve that will help to carry us over. Our Board of Directors plan to both build this reserve to its required amount and meet budget during 2014-15. In addition, we expanded to include several new programs that will result in additional funding, including two day treatment programs and a new outpatient clinic in Warren County.

   There have been significant changes in our agency structure, and hence our agency budget. As the State Mental Health system has morphed and changed, all provider agencies have been challenged to change as well. In addition, there are many more requirements of this new Mental Health system that required additional lead staff. During 2014-15, we have added additional lead staff as we have grown to the extent that we could no longer provide the necessary operations and administrative oversight without additional leadership. The new positions that were added to agency included: (1) an HR Director; (2) a Chief Operating Officer, (3) an Associate Clinical Director, and (4) a full time QI Director.

   The growth last year also required significant renovation to our outpatient clinic spaces – a one time expense.

   We also had to make the decision to move to a more appropriate Financial/GL system to accommodate the size of the agency – a costly and time consuming effort.

   The State requires that all agencies have an electronic health record system, which we had incorporated already, but we had to invest in building it to work with the programs and size of the agency now. Another one time expense.

   On the agency budget, you'll also see in FYs 2014-15 and 2015-16 a small surplus the we can hopefully achieve in order to help "reconstitute" our reserves.

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Freedom House Recovery Center**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 44,094	$ 77,150	$ 95,000	23%
Agency Generated Revenue (fees)	$ 231,659	$ 549,300	$ 550,340	0%
Local Government Grants:				
Orange County	$ 29,000	$ 29,000	$ 30,000	3%
Town of Chapel Hill	$ 17,000	$ 17,000	$ 18,000	6%
Town of Carrboro	$ 8,000	$ 8,000	$ 9,000	13%
Other Local: MCO Contracts	$ 9,153,730	$ 11,868,550	$ 12,702,704	7%
Other Local: TECS Grant	$ 140,185	$ 206,600	$ 245,000	19%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 44,187	$ 44,187	$ 44,187	0%
State Government	$ 696,000	$ 700,000	$ 700,000	0%
Federal Government				0
Other Grants: Kate B. Reynolds	$ 401,500	$ 246,100	$ 246,100	0%
Other Grants:	$ 7,500	$ 40,000	$ 45,000	13%
Miscellaneous/Other Revenue	$ 3,677	$ 5,750	$ 6,900	20%
Please list 3 largest Miscellanous sources:				
Interest Income $ 2,013.00				
Gains $ 1,664.00				
$ -				
Total Agency Revenue	**$10,776,532**	**$13,791,637**	**$14,692,231**	**7%**
AGENCY EXPENSES				
Compensation	$ 9,776,932	$12,180,237	$13,069,731	7%
Rent & Utilities	$ 321,700	$ 294,600	$ 298,000	1%
Supplies & Equipment	$ 1,234,580	$ 1,059,500	$ 1,062,200	0%
Travel & Training	$ 75,674	$ 68,000	$ 70,000	3%
Other Expenses:	$ 189,300	$ 189,300	$ 192,300	2%
Please list 3 largest "Other Expenses":				
Mortgages $ 174,300.00				
Total Agency Expenses	**$11,598,186**	**$13,791,637**	**$14,692,231**	**7%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (821,654)**	**$ -**	**$ -**	**0**

Salary Schedule 2015-2016					
Freedom House Recovery Center					
Position Title and/or Employee Name *=Position Vacant	**Full Time Equiv. Current Yr**	**2013/2014 Actual**	**2014/2015 Proposed**	**2015/2016 Proposed**	**Retirement Health/Tax Totals**
Executive Director	1 FTE	150,000.00	150,000.00	154,000.00	X
QI Director	1 FTE	-	62,000.00	63,000.00	X
Clinical Director	1 FTE	74,000.00	76,000.00	78,000.00	X
Chief Operating Office	1 FTE	17,000.00	90,000.00	90,000.00	X
Associate Clinical Director	1 FTE	-	33,000.00	66,000.00	X
HR Director	1 FTE	63,670.00	75,999.00	75,999.00	X
HR Administrative Support	1 FTE	15,665.00	33,575.00	35,000.00	X
Director of Facility Mgt	.75 FTE	47,000.00	48,750.00	49,750.00	X
Development Director	1 FTE	45,252.00	48,533.00	49,500.00	X
Administrative Asst*	1 FTE	29,000.00	34,000.00	35,000.00	X
Acount Manager/CFO	1 FTE	-	56,250.00	75,000.00	X
Accountant Support	1 FTE	38,000.00	40,000.00	40,000.00	X
Billing Specialist	3 FTE	111,199.00	116,200.00	116,200.00	X
Food Coord	2 FTE	48,000.00	61,500.00	63,000.00	X
Maintenance	1.5 FTE	26,000.00	42,000.00	45,000.00	X
TOTAL		**664,786.00**	**967,807.00**	**1,035,449.00**	
		59,297.00	**76,045.00**	**826,564.00**	**Payroll Txs**
		11,065.00	**15,065.00**	**18,608.00**	**Benefits**
		735,148.00	**1,058,917.00**	**1,880,621.00**	**Total**
Chapel Hill Programs					
Facillity Based Crisis/Non/Hospital Medical Detox					
Staff Psychiatrists/NPs	1.5 FTE	268,800.00	268,800.00	269,900.00	X
Program Director	1 FTE	64,000.00	68,000.00	71,006.00	X
Nursing Staff	4 FTEs	222,600.00	225,500.00	225,700.00	X
Qualified Prof	6.5 FTEs	434,900.00	435,900.00	436,000.00	X
UM Staff/Intake	1.75 FTE	57,000.00	59,000.00	59,000.00	X
Care Coordinators	2 FTEs	72,000.00	114,000.00	116,000.00	X
Health Care Coun	6 FTEs	254,480.00	256,900.00	258,400.00	X
TOTAL		**1,373,780.00**	**1,428,100.00**	**1,436,006.00**	
		124,630.00	**101,908.00**	**101,908.00**	**Payroll Txs**
		71,013.00	**74,250.00**	**74,250.00**	**Benefits**
		1,569,423.00	**1,604,258.00**	**1,612,164.00**	**Total**
CH Residential Halfway Houses (Alvi sand Men's)					
Program Directors	2FTE	72,000.00	72,000.00	72,000.00	X

HCC		4.5 FTE	148,000.00	150,000.00	153,000.00	X
PRN Staff			26,160.00	26,160.00	27,200.00	
	TOTAL		**246,160.00**	**248,160.00**	**252,200.00**	
			5,662.00	**10,864.00**	**10,924.00**	**Payroll Txs**
			6,121.00	**14,880.00**	**14,940.00**	**Benefits**
			257,943.00	**273,904.00**	**278,064.00**	**Total**
Chapel Hill Outpatient Clinic/Chatham Clinic						
Director of Outpatient Clinics		.5 FTE	33,000.00	33,500.00	33,500.00	X
Receptionist/Screening		1 FTE	36,000.00	37,000.00	37,500.00	X
Psychiatrist/NP		1.3 FTE	169,000.00	169,000.00	170,000.00	X
Professional Clinical		.5 FTE	24,945.00	25,200.00	25,900.00	
Nurse		.5 FTE	28,500.00	28,500.00	28,500.00	X
Comm. Intervention		10 FTE	492,735.00	495,500.00	496,700.00	X
QPs/Licensed		9 FTE	501,000.00	502,500.00	513,400.00	X
			1,285,180.00	**1,291,200.00**	**1,305,500.00**	
			105,328.00	**106,210.00**	**106,540.00**	**Payroll Txs**
			96,756.00	**96,923.00**	**97,230.00**	**Benefits**
			1,487,264.00	**1,494,333.00**	**1,509,270.00**	**Total**
Person Counseling Center/Caswell Clinic						
Receptionist/Screening		1 FTE	34,000.00	34,000.00	35,500.00	X
Office Manager		1 FTE	37,500.00	37,500.00	38,000.00	X
UM Staff/Intake		1 FTE	37,500.00	37,500.00	38,500.00	X
Psychiatrist		.75 FTE	85,000.00	85,000.00	85,000.00	
Program Director		.5FTE	33,000.00	33,500.00	34,000.00	X
Nurse Practitioner		1 FTE	90,500.00	91,500.00	92,500.00	X
Comm. Intervention		9 FTE	491,350.00	493,500.00	494,500.00	X
QPs/Licensed		6FTE	494,460.00	495,800.00	495,900.00	X
			1,303,310.00	**1,308,300.00**	**1,313,900.00**	
			105,007.00	**84,825.00**	**84,825.00**	**Payroll Txs**
			106,328.00	**97,596.00**	**97,596.00**	**Benefits**
			1,514,645.00	**1,490,721.00**	**1,496,321.00**	**Total**
FiveCounty Programs						
			331,151.00	**334,500.00**	**335,800.00**	**Salaries**
			17,336.00	**18,400.00**	**19,300.00**	**Payroll Txs**
			33,075.00	**34,500.00**	**34,896.00**	**Benefits**
			381,562.00	**387,400.00**	**389,996.00**	**Total**
Durham Programs						
Durham Center Access/ Mobile Crisis/Walk-in Crisis						

			2,751,656.00	4,837,042.00	4,855,534.00	Salaries
			215,650.00	215,850.00	215,850.00	Payroll Txs
			146,025.00	148,025.00	148,025.00	Benefits
			3,113,331.00	5,200,917.00	5,219,409.00	Total
Durham Halfway Houses						
			325,591.00	326,690.00	328,850.00	Salaries
			30,638.00	30,710.00	30,950.00	Payroll Txs
			33,904.00	34,516.00	35,516.00	Benefits
			390,133.00	391,916.00	395,316.00	Total
SABIOS						
	(Added Director)		203,959.00	232,136.00	242,136.00	
			15,554.00	24,011.00	24,520.00	Payroll Txs
			7,970.00	21,724.00	21,914.00	Benefits
			227,483.00	277,871.00	288,570.00	Total
TOTAL			$ 9,676,932.00	$ 12,180,237.00	$ 13,069,731.00	
			*Includes Professional Medical and clinical)			
Volunteer Hours = 3924						
Calculate a Full Time Equivalent for all recorded volunteer hours using the following: Total Volunteer Hours = Volunteer FTE						
				1942		

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00 PM

Agency Name: Guiding Lights

Street Address: 3724 National Drive, Suite 130, Raleigh NC 27612-4824

Mailing Address: 3724 National Drive, Suite 130, Raleigh NC 27612-4824

Website Address: www.guidinglightsnc.org

Executive Director: Nicole M. Bruno

Telephone: 919-371-2062 E-Mail: nicole@guidinglightsnc.org

Contact Person: Nicole M. Bruno

Telephone: 919-371-2062 E-Mail: Nicole@guidinglightsnc.org

Fax: 919-747-4256 Federal ID Number: 80-0555761

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$0	$7,500
Summary of intended use of funds: To support a Care Coordination and Support (CC&S) Service in collaboration with the nonprofit Charles House Center for Caregiving, to serve family caregivers in Orange County seeking information, training, and assistance in providing care for loved ones.		
Town of Chapel Hill	$0	$3,000
Summary of intended use of funds: To support the services of the joint Care Coordination and Support (CC&S) Service within the Charles House Center for Caregiving to caregiving families in Chapel Hill.		
Town of Carrboro	$0	$3,000
Summary of intended use of funds: To support the services of the joint Care Coordination and Support (CC&S) Service within the Charles House Center for Caregiving to caregiving families in Carrboro.		

Nicole Bruno
Executive Director

Marcia Jarrell
Board Chair

Date

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 1/25/2010

   b. Years in Operation: 4.5 years

   c. Mission or Vision Statement (if applicable):

      Mission: To be *the* comprehensive caregiver support center for family and professional caregiving in the Triangle.
      Vision: To assist family and professional caregivers to obtain relevant, timely and comprehensive information from the premiere caregiving organization in the Triangle.

   d. Brief History of Agency:

      Guiding Lights was founded in 2010 by Nicole Bruno (Executive Director) and Julie Falconer (Dementia Care Specialist, formerly Director of Programs) and has grown quickly over the past four years in response to strong demand for its services. It now serves an average of 265 caregivers each month and reaches thousands of others annually through its extensive community outreach and education initiatives. Guiding Lights serves the entire Triangle area, and is particularly growing its outreach throughout Orange County. With respect to the latter, Guiding Lights is a partner in the Chatham-Orange Counties Community Resources Connection, and a member of the SHARP Committee. It makes regular presentations at the Orange County Department of Social Services, works collaboratively with the Orange County Department on Aging, and receives support through a grant from Carolina Meadows to conduct targeted outreach in Orange County. Since 2011 has also reached Orange County residents through a weekly radio show on Chapel Hill station WCHL, hosted by Guiding Lights Executive Director Nicole Bruno (http://guidinglightsnc.org/caring-connections-show.php). Nicole is also now the Caregiver Correspondent on a weekly radio show on WPTF, which airs throughout the Triangle and beyond.

      Guiding Lights has also developed strong community partnerships and close relationships to the local healthcare industry, including in Orange County. Many professionals now utilize Guiding Lights as an extension of their case management department. A number of Orange County professionals, including some from the UNC Healthcare system, have provided input for Guiding Lights' educational DVDs. Guiding Lights also cohosts two Triangle Caregivers Conference, held annually in Durham and Raleigh, both serving Orange County residents.

      Guiding Lights has recently entered a management services agreement with Transitions LifeCare that implements an innovative model for creating efficiencies between two non-profit organizations with similar missions and audiences, providing increased financial stability for Guiding Lights, and significantly expanding its reach, including in Chapel Hill and Carrboro. In

addition, Guiding Lights has formed a collaboration with Charles House Association to jointly staff a position in Chapel Hill beginning in Spring 2015 to provide Guiding Lights' Care Coordination and Support Service to Orange County. Guiding Lights is also exploring the possibility of expanding the Triangle Caregivers Conference, to host an additional conference in Chapel Hill in June, 2016.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

The need is great and increasing, as the older population increases in size. In North Carolina, there are more than 1.3 million people over the age of 65. In five years the state will have more residents over 60 than under 18 years.

Most older adults require caregiving assistance at some point - more than two thirds (68%) of seniors eventually become cognitively impaired or need assistance with at least two basic activities of daily living, such as bathing, dressing, or walking (AARP, 2003). **The vast majority of long-term care (78%) is provided at home or in community settings, by family members and friends**. (National Alliance for Caregiving/AARP, 2009).

Family caregivers keep older adults out of institutions. Having a family member available to help reduces the likelihood of living in an institution by 86% (U. S. Administration on Aging, 2000). As a result, only 4% of older adults live in nursing homes or assisted living facilities. Even among the oldest adults, those 85 years old and above, only 15.4% live in nursing homes. All in all, at present more than 840,000 caregivers provide 900 million caregiving hours per year in North Carolina.

Most caregivers are ill-prepared for their role and provide care with little or no support (National Alliance for Caregiving & AARP, 2004; Alzheimer's Association & National Alliance for Caregiving, 2004; Family Caregiver Alliance, 2006). To complicate matters, the caregiving role "has dramatically expanded to include performing medical/nursing tasks of the kind and complexity once provided only in hospitals" (AARP, 2012).

Guiding Lights was founded in response to these large and ever-increasing needs, and in particular to support family caregivers who struggle from lack of information and skills due to a lack of support from healthcare services whose primary emphasis is on the care receiver.

The program for which Guiding Lights requests funding, the Care Consultation and Support Service is unique; no other agency in this area offers this type of information and referral service that is integrated with individualized care planning. The closest community equivalent is offered by private Geriatric Care Managers, who charge $75-150/hour, in contrast to our free service. Other agencies, including senior centers, often provide lists of resources but do not offer care planning, specific recommendations of vetted service providers, and assistance in connecting to providers. For-profit elder care placement agencies help families with placements, but work on commission and often

steer clients to facilities that pay the highest commissions, sometimes $3,500 per person or more.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

   Guiding Lights has operated the Care Coordination and Support (CC&S) Service since 2010. Beginning in April, 2015, Guiding Lights will open a satellite office in Orange County, at the Charles House Association's new facility on the Carol Woods Retirement Community campus. This branch of Guiding Lights' CC&S service will serve Orange County, including Chapel Hill and Carrboro. Charles House and Guiding Lights will jointly fund a staff position, with 50% of this person's time devoted to the CC&S Service. Through this collaboration, and in partnership with Carol Woods Retirement Community, Guiding Lights also plans to bring its dementia care training program to Orange County, and is exploring the expansion of its Nurse Aide (NA1) Training Program training as well.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

   The CC&S Service is provided free of charge. Revenue to run the program comes from foundation and government grants, fundraising, and corporate partnerships. These are ongoing sources, although we continue to seek out new grant sources. Guiding Lights is seeking funds through the Orange County Outside Funding program for the first time.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)
   - Charles House Association will provide space at its new offices at Carol Woods Retirement Community in Chapel Hill.
   - Guiding Lights works with 300 high quality local service providers that it has personally researched and vetted. In doing so, it collaborates with businesses that provide services including residential care providers, in-home care, care coordination specialists, financial and legal assistance, insurance, coaching and support, sources of health information, medical equipment, and home maintenance/adjustments, and much more. Approximately 70% of Guiding Lights' vetted vendors serve Orange County.
   - The work that Guiding Lights does in the community is well respected, and financial support from organizations that serve older adults continues to grow across the Triangle area, including in Orange County.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

   Of the clients served by the CC&S Service, currently 12% are African-American and 3% are Hispanic.

   Guiding Lights is part of a taskforce whose aim is to reach more minority caregivers, particularly in Durham and Orange County. The taskforce is led by the Transitions LifeCare Community Engagement staff person.

7. Place an “X” in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition		X	X	X
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing		X	X	X
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
1. 90% of clients will report high levels of satisfaction with the CC&S Service.	1. Referral Specialists provide a free referral and consultation service. Caregivers may call or drop in Monday- Friday 10 am to 5 pm, as well as by appointment on Saturday from 9 am to 12 pm. Referral Specialists: (1) create individualized care plans, based on an assessment of the client's individual needs, desires, and financial resources; and (2) identify and connect clients to affordable providers that are carefully researched and vetted to ensure the highest quality services. Service providers include: residential care providers, in-home care, care coordination specialists, financial and legal assistance, insurance, coaching and support, sources of health information, medical equipment, and home maintenance/adjustments. Guiding Lights follows up by telephone at 3, 5, 7, 14, 30 and 60 days to check in, provide emotional support and assist proactively to identify additional needs.	1. High client satisfaction, with 98% of clients reporting they were very satisfied with the CC&S Service and 90% stating that Guiding Lights provided better solutions compared to other agencies that they had called. Every request from clients was successfully met and every caregiving problem solved.	1. Guiding Lights conducted follow up surveys at 2 time points. (1) At 2 weeks, clients are asked to complete a brief online or paper survey rating their satisfaction with the information they received about Guiding Lights' programs, the quality of customer service, the specific solutions they were given, and their overall experience as a client. (2) At one month, a clients rate the appropriateness of the referrals and their satisfaction with the vendors.

2. The CC&S Service will reach individuals of all income levels, and particularly reach those providing care to the elderly.	2. The CC&S Service is offered free of charge and Referral Specialists conduct the necessary research to find affordable options that are high quality. They also will seek donated services whenever necessary. These have included free respite care, medical equipment, an air conditioning unit, reduced prices for medications, etc.	2. All requests for assistance were filled, and in 2013-2014, 38% of care receivers were on Medicaid, indicating that these individuals come from low income households. Approxiimatley 90% of caregivers served provided care to a family member over the age of 55.	2. Guiding Lights tracks the clients it serves and their demographic information.
3. The CC&S Service will continue to grow its reach to more caregiving families.	3. The Community Outreach Specialist and Executive Director conduct ongoing outreach, including community presentations and meeting with service providers.	3. Total number of clients served: 3,188 Number of clients per month: 265 Number of vetted providers: 290 These represent increases of 15% in the number of clients served, and 32% in the number of vetted providers.	3. Guiding Lights tracks activities of the CC&S Service.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2015-16 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
1. 90% of clients will report high levels of satisfaction with the CC&S Service.	1. Referral Specialists provide a free referral and consultation service. Caregivers may call or drop in Monday- Friday 10 am to 5 pm, as well as by appointment on Saturday from 9 am to 12 pm. Referral Specialists: (1) create individualized care plans, based on an assessment of the client's individual needs, desires, and financial resources; and (2) identify and connect clients to affordable providers that are carefully researched and vetted to ensure the highest quality services. Service providers include: residential care providers, in-home care, care coordination specialists, financial and legal assistance, insurance, coaching and support, sources of health information, medical equipment, and home maintenance/adjustments. Guiding Lights follows up by telephone at 3, 5, 7, 14, 30 and 60 days to check in, provide emotional support and assist proactively to identify additional needs.	1. At least 90% of clients will report being very satisfied with the CC&S Service and will state that Guiding Lights provided better solutions compared to other agencies that they had called. Every request from clients will be successfully met and every caregiving problem solved.	1. Guiding Lights will conduct follow up surveys at 2 time points. (1) At 2 weeks, clients will be asked to complete a brief online or paper survey rating their satisfaction with the information they received about Guiding Lights' programs, the quality of customer service, the specific solutions they were given, and their overall experience as a client. (2) At one month, a clients will rate the appropriateness of the referrals and their satisfaction with the vendors.
2. At least one third of CC&S Service clients will be providing care for low income individuals, and 90% will provide care to the elderly.	2. The CC&S Service will be offered free of charge and Referral Specialists will conduct the necessary research to find affordable options that are high quality. They also will seek donated services whenever necessary.	2. All requests for assistance will be filled, and at least 25% of care receivers will be from low income households. Approxiimatley 90% of caregivers served will provide care to a family member over the age of 55.	2. Guiding Lights will track the clients it serves and their demographic information.

3. The CC&S Service will continue to grow its reach to more caregiving families.	3. The Community Outreach Specialist and Executive Director will conduct ongoing outreach, including community presentations and meetings with service providers.	3. The number of clients served will increase by 10% to 3,500.	3. Guiding Lights will track activities of the CC&S Service.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Guiding Lights

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 3,600	$ 4,000	$ 4,400	10%
Program Generated Revenue (fees)	$ 42,000	$ 55,000	$ 63,000	15%
Local Government Grants:				
Orange County	$ -	$ -		0
Town of Chapel Hill	$ -	$ -		0
Town of Carrboro	$ -	$ -		0
Other Local: City of Raleigh	$ 4,000	$ -	$ 5,000	0
Other Local:	$ -	$ -		0
Other Local:	$ -	$ -		0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -	$ -	$ -	0
State Government	$ -	$ -	$ -	0
Federal Government	$ -	$ -	$ -	0
Other Grants: Oak Foundation	$ 20,000	$ 20,000	$ 20,000	0%
Other Grants: M D Biddle, Eisai, Carol Woods,Rex Healthca	$ 6,500	$ 12,500	$ 16,500	32%
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
Total Program Revenue	**$ 76,100**	**$ 91,500**	**$ 108,900**	**19%**
PROGRAM EXPENSES				
Compensation	$ 36,514	$ 53,320	$ 65,200	22%
Rent & Utilities	$ 23,901	$ 22,828	$ 26,232	15%
Supplies & Equipment	$ 367	$ 1,000	$ 3,820	282%
Travel & Training	$ 80	$ 180	$ 200	11%
Other Expenses:	$ 13,717	$ 12,300	$ 11,913	-3%
Please list 3 largest "Other Expenses":				
Contractual Services $ 11,113.00				
Advertising $ 800.00				
$ -				
Total Program Expenses	**$ 74,579**	**$ 89,628**	**$ 107,365**	**20%**

SURPLUS/(DEFICIT) FOR PERIOD:	**$ 1,521**	**$ 1,872**	**$ 1,535**	**-18%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: One consultation involving staff time (up to 60 min.), including time spent with client, identifying appropriate resources/services, tracking service delivery, etc. NOTE: Every caregiver who contacted Guiding Lights received the requested assistance.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	3188	3188	$74,579	$23.39
Estimated FY14-15	3347	3347	$89,628	$26.78
Projected FY15-16	3515	3515	$107,365	$30.54

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Care Coordination and Support Service

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	574	603	633	Durham City	636	557	700
Female	2614	2744	2882	Durham County	104	169	115
2. **Ethnicity**				Raleigh City	1370	1419	1510
African-American	383	402	423	Wake County	350	368	404
Caucasian	2710	2845	2988	Town of Chapel Hill	178	250	263
Hispanic	64	67	71	Town of Carrboro	79	125	140
Other	31	33	34	Orange County	94	150	162
3. **Age**				Other (specify) (Harnett, Johnston, out of state, etc.)	377	309	221
0-5 Years	0	0	0				
6-18 Years	0	0	0	Per cent of clients at, or below, federal poverty level	38%	38%	38%
19-50 Years	1307	1424	1550				
51+ Years	1581	1690	1750				
Unknown	300	233	215	***TOTAL # OF CLIENTS SERVED***	3188	3347	3515

Section VI.

Comparative Budget for Entire Agency
(Excel file)

Agencies must still send a copy of the MS Excel file with their electronic application, even if they choose to embed the Excel table, on this page. The MS Excel file can be found here.

1. Please complete a Comparative Budget Excel Form **for the entire agency.** This budget form is required, even if the figures match the Program Budget Form(s).

2. If the agency's finances experienced significant changes that you would like to explain, please use the space below.

Notes:
The Executive Director moved from part-time to full-time in August, 2014. The Charles House CC&S Staff position is expected to begin in April, 2015. The Nurse Assistant Training Program was not fully launched until Fall, 2014.

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: GUIDING LIGHTS

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 18,135	$ 18,779	$ 23,620	26%
Agency Generated Revenue (fees)	$ 113,475	$ 116,880	$ 150,425	29%
Local Government Grants:				
Orange County	$ -	$ -	$ 7,500	0
Town of Chapel Hill	$ -	$ -	$ 3,000	0
Town of Carrboro	$ -	$ -	$ 3,000	0
Other Local: City of Raleigh	$ 993	$ 5,000	$ 31,400	528%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -	$ -	$ -	0
State Government	$ -	$ -	$ -	0
Federal Government	$ -	$ -	$ -	0
Other Grants: Oak Fndtn	$ 75,000	$ 80,000	$ 99,500	24%
Other Grants: Carol Woods, Rex Healthcare, Eisai, Whole Foods, Carolina Meadows, AFA, and, for 15-16, others in prep	$ 15,000	$ 10,700	$ 41,300	286%
Miscellaneous/Other Revenue	$ 11	$ 11	$ 11	0%
Please list 3 largest Miscellanous sources:				
In kind/investment income/year $ 11.00				
$ -				
$ -				
Total Agency Revenue	**$ 222,614**	**$ 231,370**	**$ 359,756**	**55%**
AGENCY EXPENSES				
Compensation	$ 92,110	$ 114,100	$ 139,315	22%
Rent & Utilities	$ 26,083	$ 22,828	$ 28,757	26%
Supplies & Equipment	$ 1,803	$ 4,761	$ 3,604	-24%
Travel & Training	$ 188	$ 2,500	$ 7,230	189%
Other Expenses:	$ 87,636	$ 86,564	$ 111,384	29%
Please list 3 largest "Other Expenses":				
Contracted Services $ 28,460.00				
Fundraising $ 65,714.49				
Program Fees $ 18,210.00				
Total Agency Expenses	**$ 207,821**	**$ 230,753**	**$ 290,291**	**26%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 14,793**	**$ 617**	**$ 69,465**	**11159%**

FY 2015-16 Comparative Agency Budget
Revised 9/29/2014

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Guiding Lights

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director (moved to full time in 2014-2015)	1.00	9%	$ 28,626.02	$ 45,720.00	$ 45,720.00	12.7 %	H
Referral Specialist	.625	100%	$ 19,419.00	$20,079.00	$20,681.00	5.74%	No
Program Support Specialist	.375	100%	$ 9,001.00	$ 10,219.00	$10,526.00	2.93%	No
Community Outreach Specialist	.25	75%	$ 8,093.00	$ 10,198.00	$10,504.00	2.91%	No
Charles House CC&S Staff (new in 2014-2015)	.50	100%	-	$4,200.00	$22,500.00	6.25%	No
Dementia Care Specialist	.09	0%	$ 19,452.00	$ 11,654.00	$ 9,900.00	2.75%	No
Nurse Assistant (NA1) Training Program Coordinator	.08	0%	$ 66.90	$ 6,239.00	$ 6,426.00	1.79%	No
Nurse Assistant (NA1) Training Program Nurse Instructor	.42	0%	0	$ 9,990.00	$ 10,290.00	2.86%	No
Awakening Program Mentor	.125	0%	$4,980.00	$ 4,841.00	$ 4,730.00	1.31%	No

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Habitat for Humanity, Orange County, NC, Inc.

Street Address: 88 Vilcom Center Drive, Suite L110, Chapel Hill, NC 27514

Mailing Address: 88 Vilcom Center Drive, Suite L110, Chapel Hill, NC 27514

Website Address: www.orangehabitat.org

Executive Director: Susan Levy

Telephone: (919) 932-7077 E-Mail: info@orangehabitat.org

Contact Person: Susan Levy, Executive Director

Telephone: (919) 932-7077 ext. 211 E-Mail: slevy@orangehabitat.org

Fax: (919) 932-7079 Federal ID Number: 58-1603427

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$20,000	$25,000
Summary of intended use of funds: Habitat is seeking $25,000 to assist with funding its A Brush with Kindness program. Habitat will serve 15-18 low and very low-income homeowners in Orange County who are in need of exterior repairs on their homes.		
Town of Chapel Hill	$4,000	$5,000
Summary of intended use of funds: Habitat is seeking $5,000 to assist with funding its A Brush with Kindness program. Habitat will serve 5 low and very low-income homeowners in Chapel Hill. Funds will also be used to support continued community development within the Rogers Road neighborhood.		
Town of Carrboro	$2,000	$5,000
Summary of intended use of funds: Habitat is seeking $5,000 to assist with funding its A Brush with Kindness program. Habitat will serve 1-2 low and very low-income homeowners in Carrboro who are in need of exterior repairs on their homes.		

Susan Levy
Executive Director

Board Chair

1/23/2015
Date

1/23/2015
Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

    a. Date of Incorporation: April 13, 1984

    b. Years in Operation: 30

    c. Mission or Vision Statement (if applicable):

Mission statement: Habitat for Humanity of Orange County changes lives by bringing together God's people and resources to help families in need build and own quality affordable homes in safe and supportive communities.

Vision statement: Everyone in Orange County has a decent place to live.

    d. Brief History of Agency:

Habitat for Humanity of Orange County is a local nonprofit organization affiliated with Habitat for Humanity International (HFHI). Habitat provides affordable homeownership opportunities for families who live and/or work in Orange County, earn between 30% and 60% of the area median income (AMI), and live in substandard housing. Habitat also provides exterior and critical home repairs to low-wealth homeowners through its A Brush with Kindness program, launched in 2010. Habitat is committed to strengthening the neighborhoods where it builds, not only by building or repairing affordable homes, but also by developing relationships and supporting other neighborhood improvement initiatives identified by neighborhood residents.

Habitat was incorporated in 1984, and completed its first home in 1987. Since that first home, Habitat has built almost 250 affordable homes throughout the county. Through its new home construction program, Habitat uses donations and volunteer labor to construct energy-efficient, green-certified, high-quality homes, and then sells those homes to qualifying families. The buyers receive an affordable mortgage, which they pay back over 30 years. Mortgage payments are recycled to build future homes. Homebuyers are required to contribute 325 hours of sweat equity toward the construction of their own and other Habitat homes. Habitat retains the right of first refusal to repurchase a Habitat home if the owner wishes to sell. Habitat uses deferred-payment second mortgages and equity sharing to ensure that the community's investment of funds and labor will continue to benefit low-income families if the original buyer sells the home.

A Brush with Kindness (ABWK) is a Habitat program which addresses the ongoing need for exterior repairs and beautification in the communities where Habitat builds. ABWK is an important aspect of Habitat's affordable housing programs because it offers low-cost assistance to homeowners living in deteriorating or unsafe homes, improving their quality of life and the quality of life of all of the residents in the neighborhood. Habitat has completed 48 ABWK projects since launching the program in FY 2009-10.

In carrying out its affordable housing and community strengthening activities, Habitat seeks to educate and empower its homebuyers through a series of relevant workshops and one-on-one trainings. Habitat also strives to educate the broader community about the crisis in affordable

housing by introducing and involving hundreds of new volunteers from all walks of life into its work each year. Habitat promotes the positive value of diversity by uniting people of varied economic, religious, social, and racial backgrounds to work together toward a common goal—building and repairing decent homes in partnership with families in need.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Habitat will continue to address the county's priority need for affordable homeownership for low and very low-income renters through its new home construction program. However, Habitat's experience working with residents in the communities where it builds new homes has helped to identify an underserved need among low-income homeowners, especially those who are elderly or disabled. Habitat has had direct experience with low-income families in Orange County who are struggling to maintain the exterior of their homes, and who need modifications to their homes so that they can continue to live in and enjoy them. Rot, peeling paint, sagging gutters, broken doors, unsafe porches, yard waste, and lack of accessibility impact the safety, livability, and value of individual homes in neighborhoods like Fairview, Rogers Road, Northside, and Pine Knolls, as well as in more rural areas of the county like Efland.

Habitat launched A Brush with Kindness (ABWK) as a pilot program in 2009 with two projects in Hillsborough. When Habitat formalized the program in 2010, it also created an informal Advisory Committee, inviting other repair program providers to meet to share information and referrals for repairs within the county. The services Habitat provides through ABWK complement those provided by JOCCA, Rebuilding Together of the Triangle, and Orange County's Urgent Repair and Rehab programs. All of these agencies provide referrals to Habitat's ABWK program, and Habitat refers clients to them. To date, Habitat has received a total of 124 applications: 3 in 2009, 2 in 2010, 13 in 2011, 24 in 2012, 55 in 2013, and 27 in 2014. In 2014 over 90% of the Orange County residents who applied to the program were elderly and/or disabled. Overall, 30% of applicants come through agency referrals, and the remaining 70% come through targeted neighborhood marketing and word of mouth.

When Habitat expanded the ABWK program to the Rogers Road community, it utilized Success Measures, a data collection tool developed by NeighborWorks, to conduct a parcel observation survey of the Rogers Road community. Through this survey, Habitat identified 20 homes in need of minor exterior repairs such as yard clean up, siding repair, deck repair/replacement, handrail additions, gutter maintenance, and painting. Habitat developed a strategy to market the ABWK program specifically to these households, and to encourage participation among those who qualify. Of those 20 homes, Habitat has received 12 applications and completed 11 ABWK projects to date.

In 2012, Habitat was asked by the Town of Chapel Hill to implement ABWK in the Northside/Pine Knolls neighborhoods on a pilot basis. Since that time, Habitat has completed a total of 15 repairs in both neighborhoods. Habitat completed four ABWK projects in Northside and five in Pine Knolls in 2014, as part of an ongoing retention strategy to help existing homeowners stay in their homes, while also increasing the attractiveness of the neighborhood.

Habitat will continue to market the program and complete exterior repair projects in both of these neighborhoods in FY 2015-16. There are currently two additional repairs scheduled for completion in Northside before the end of this fiscal year.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Habitat is projected to complete 18 ABWK projects in FY 2014-15. Based on the continuing demand for this program, Habitat plans to complete at least the same number of projects in FY 2015-16. In FY 2014-15, Habitat responded to the rapid expansion of the program (a 50% increase in FY 2013-2104 over the number of projects completed in FY 2012-13) by adding a new position through the Johnson Service Corps. The Corps Member serves as Habitat's Community Outreach Coordinator. The Coordinator supports the ABWK program by distributing applications in targeted ABWK communities, creating marketing materials, taking before and after photographs of eligible homes, gathering volunteer data, managing program statistics, acting as liaison to the Blue Ribbon Youth Leadership Institute volunteers, and engaging local faith congregations to support ABWK as volunteers and donors. This position or its equivalent is necessary to maintain the current level of service of 15-18 projects per year. In order to expand beyond this level, Habitat would need to add additional staff. Habitat's Board of Directors and staff are working on an updated strategic plan and considering whether or not to further increase staff capacity to enable the organization to take on more projects and/or expand the scope of services to include additional types of repairs beyond what is currently offered.

Operationally, Habitat will continue to focus the ABWK program in the Fairview neighborhood in Hillsborough, in the Northside/Pine Knolls neighborhood in Chapel Hill, and in Efland, where Habitat is currently building new homes in the Tinnin Woods subdivision. Habitat expects to serve fewer households in the Rogers Road community in the upcoming year. As a result of thorough marketing and canvassing over the past several years, all residents who applied and qualified for the program in that neighborhood have been served.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

Habitat was awarded $25,000 in Community Development Block Grant funding by the Town of Chapel Hill to complete an additional five ABWK projects in Northside/Pine Knolls in FY 2014-15. Habitat also received $2,000 in Outside Agency Funding from the Town of Carrboro for one ABWK project in FY 2014-15. Habitat will again seek funding for FY 2015-16 to serve at least one household in Carrboro.

In addition to the FY 2015-16 Community Development Block Grant funding that Habitat will apply for, and the Outside Agency Funding from the Town of Carrboro, Habitat continues to reach out to faith-based partners to sponsor ABWK projects with funds and volunteers. One faith congregation, newhope church, has committed to three ABWK projects in 2015. They previously funded and provided volunteers for five projects in Northside and Pine Knolls. Habitat will also apply for funding from the Thrivent Builds Exterior Repairs program for 1-2 ABWK projects this fiscal year. The program provides up to $2,500 per ABWK project. If successful, Habitat will apply again for the same number of projects for FY 2015-16.

Habitat also markets the program to individual donors, and this fiscal year, received a gift of $7,500 from an anonymous donor to sponsor a collaboration between Habitat's ABWK program and the Blue Ribbon Youth Leadership Institute (YLI). In addition to financially supporting the ABWK program, the donor will provide scholarships for up to ten YLI students who complete 50 hours of volunteer service working on ABWK or other Habitat projects.

Habitat also receives minimal income from the clients served by ABWK, who pay the cost of materials, either through an affordable zero-interest loan or a discounted upfront fee. The cost to clients is pro-rated based on their income.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- To strengthen ABWK, Habitat created and implemented the ABWK Advisory Committee. Individuals from JOCCA, the Town of Chapel Hill Planning Department, the Orange County Housing and Community Development Department, faith congregations, and Rebuilding Together of the Triangle meet periodically to gain a greater understanding of the scope of programs and services offered by each, and to develop a more effective system of client referrals.

- Habitat staff and volunteers work with established leaders in the neighborhoods they serve, and also strive to identify and nurture new leaders, providing support and training as needed. Habitat's commitment to strengthening neighborhoods includes a variety of trainings and workshops that promote leadership specifically for the youth and adults who reside there. Collaborative efforts that began several years ago with both the Rogers-Eubanks Neighborhood Association (RENA) and the Fairview Community Watch enhance the overall quality of life in each neighborhood, and also serve to spread the word about ABWK and ensure that residents who could benefit from the program are identified and referred. Collaborative efforts in the Rogers Road community have engaged representatives from the Department on Aging, Piedmont Health Services, St. Paul AME Church, RENA, Justice United, Habitat's Youth United program, Blue Ribbon Mentor Advocates, and the UNC Habitat Campus Chapter.

- The local faith and business communities continue to provide funds and volunteer labor to support both ABWK and Habitat's new home construction program.

- When Habitat expanded ABWK to the Northside/Pine Knolls neighborhoods, the Jackson Center was instrumental in introducing Habitat to key residents of that community, helping to market the program, and identifying potentially qualified families. In addition, Habitat's Executive Director participated as a member of a resource group assembled by Self-Help Credit Union and the Jackson Center, which worked with residents to develop a variety of strategies to address complex issues affecting their neighborhood.

- Habitat coordinates with the Blue Ribbon Youth Leadership Institute to provide volunteer opportunities for high school students who can apply for a scholarship to assist with higher education if they complete 50 hours of service with Habitat, primarily on ABWK projects. The funding for the scholarship program is provided by an anonymous donor.

- Habitat is a member of the Orange County Affordable Housing Coalition, a group of housing providers and advocates who are working together to increase resources for the full range of

housing needs in Orange County, including home repair. Habitat's Executive Director currently chairs the Coalition.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Habitat strives to achieve ethnic and minority diversity in its Board of Directors (see attached list), staff, committees, Advisory Board, and partnerships through active and ongoing recruitment efforts. In marketing its volunteer opportunities, Habitat contacts faith congregations, community organizations, and businesses that serve and employ diverse racial and ethnic groups. Habitat is intentional about making ABWK applications available in high-traffic areas, such as Orange Congregations in Mission, the Inter-Faith Council, Orange County Social Services, Chapel Hill-Carrboro Meals on Wheels, the Jackson Center, the RENA Center, and numerous churches throughout the county.

Habitat has been building homes in the Rogers Road community in Chapel Hill and the Fairview community in Hillsborough, both historically African-American communities, for more than a decade. The applicants that have been approved over the years for homes in these two neighborhoods have been racially and ethnically diverse. Habitat also provides translators at application sessions, trainings, meetings, and community events to accommodate non-English speakers.

Habitat has also reached out to the residents of the Rogers Road and Fairview communities to educate them about its homeownership and ABWK programs, and participates in community events and meetings. These outreach efforts by Habitat in the neighborhoods where it builds help create trusting relationships within those communities, and increase the probability that residents will apply and refer others to the ABWK program.

Engaging volunteers to complete ABWK projects provides Habitat with an effective vehicle for bringing together diverse groups and individuals to work toward a common goal. Habitat's volunteers are of diverse racial, cultural, faith, generational, and socioeconomic backgrounds.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing		x	x	x
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
12-15 homes will be selected for exterior repairs in Orange County	Advertise program, process applications, recruit volunteers, perform specific exterior home repairs	17 homes were repaired (above goal)	Repairs completed within the fiscal year were counted.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2015-16 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
15-18 homes will be selected for exterior repairs in Orange County	Advertise program, process applications, recruit volunteers, perform specific exterior home repairs	15-18 homes repaired	Repairs completed within the fiscal year will be counted

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Habitat for Humanity of Orange County**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)	$ 83,650	$ 94,103	$ 92,366	-2%
Local Government Grants:				
Orange County	$ 20,000	$ 20,000	$ 25,000	25%
Town of Chapel Hill	$ 4,000	$ 4,000	$ 5,000	25%
Town of Carrboro		$ 2,000	$ 5,000	150%
Other Local: Chapel Hill Housing Trust Fund	$ 25,000	$ 25,000	$ 25,000	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 132,650**	**$ 145,103**	**$ 152,366**	**5%**
PROGRAM EXPENSES				
Compensation	$ 91,126	$ 99,617	$ 105,040	5%
Rent & Utilities	$ 7,680	$ 8,325	$ 8,586	3%
Supplies & Equipment	$ 9,258	$ 10,089	$ 10,362	3%
Travel & Training	$ 1,260	$ 2,072	$ 2,128	3%
Other Expenses:	$ 23,326	$ 25,000	$ 26,250	5%
Please list 3 largest "Other Expenses": 2014-15				
Cost of Construction $ 25,000.00				
$ -				
$ -				
Total Program Expenses	**$ 132,650**	**$ 145,103**	**$ 152,366**	**5%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: Individual household member living in a home that has been repaired through Habitat's A Brush with Kindness program.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	21	21	$132,650	$6,317
Estimated FY14-15	30	30	$145,103	$4,837
Projected FY15-16	30	30	$152,366	$5,079

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: A Brush with Kindness

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	8	14	14	Durham City	0	0	0
Female	13	16	16	Durham County	0	0	0
2. **Ethnicity**				Raleigh City	0	0	0
African-American	21	29	29	Wake County	0	0	0
Caucasian	0	1	1	Town of Chapel Hill	20	17	17
Hispanic	0	0	0	Town of Carrboro	0	1	1
Other	0	0	0	Orange County	1	12	12
3. **Age**				Other (specify)	0	0	0
0-5 Years	0	0	0				
6-18 Years	1	1	1	Per cent of clients at, or below, federal poverty level	20%	15%	15%
19-50 Years	2	6	6				
51+ Years	18	23	23				
Unknown	0	0	0	***TOTAL # OF CLIENTS SERVED***	21	30	30

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Habitat for Humanity of Orange County**

	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
PROGRAM REVENUE				
Private Donations				0
Program Generated Revenue (fees)	$ 971,561	$ 984,370	$ 1,015,200	3%
Local Government Grants:				
Orange County	$ 20,000	$ 20,000	$ 25,000	25%
Town of Chapel Hill	$ 4,000	$ 4,000	$ 5,000	25%
Town of Carrboro		$ 2,000	$ 5,000	150%
Other Local: Chapel Hill Housing Trust Fund	$ 25,000	$ 25,000	$ 25,000	0%
Other Local: OC HOME/Bond Funds	$ 261,592	$ 359,304	$ 215,000	-40%
Other Local: Other CH/OC Funds	$ 34,500	$ 66,000	$ 65,000	-2%
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 5,280	$ 5,612	$ 5,800	3%
State Government				0
Federal Government				0
Other Grants: Stewards Fund, Rambus, Kirby, others	$ 326,000	$ 286,000	$ 275,000	-4%
Other Grants:				0
Miscellaneous/Other Revenue	$ 1,471,154	$ 1,517,500	$ 1,198,100	-21%
Please list 3 largest Miscellanous sources: 2014-15				
Mortgage Payments $ 535,000				
NCHFA $ 430,000				
New Market Tax Credits $ 275,000				
Total Program Revenue	**$ 3,119,087**	**$ 3,269,786**	**$ 2,834,100**	**-13%**
PROGRAM EXPENSES				
Compensation	$ 942,627	$ 1,034,297	$ 1,065,326	3%
Rent & Utilities	$ 79,448	$ 86,397	$ 88,837	3%
Supplies & Equipment	$ 101,340	$ 102,257	$ 104,710	2%
Travel & Training	$ 13,039	$ 23,500	$ 23,970	2%
Other Expenses:	$ 1,893,233	$ 2,030,057	$ 1,533,715	-24%
Please list 3 largest "Other Expenses": 2014-15				
Construction & Land Costs $ 1,699,196				
Tithe to National Organization $ 49,500				
Work. Comp. & Directors Insurance $ 35,400				
Total Program Expenses	**$ 3,029,686**	**$ 3,276,508**	**$ 2,816,558**	**-14%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 89,401**	**$ (6,722)**	**$ 17,542**	**361%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Habitat for Humanity of Orange County

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1.0	3%	$77,920	$83,512	$86,017	3.1%	R, H
Development Director	1.0	0%	$16,646	$75,000	$77,250	2.7%	R, H
Construction Director	1.0	5%	$62,900	$64,896	$66,843	2.4%	R, H
Finance Director	0.8	1%	$59,167	$54,047	$56,650	2.0%	R, H
Family Services Director	1.0	15%	$26,339	$54,786	$56,430	2.0%	R, H
Construction Project Manager	1.0	1%	$55,691	$57,115	$53,560	1.9%	R, H
Associate Director of Development	1.0	0%	$59,083	$50,000	$51,500	1.8%	R, H
Assoc. Director of Administration	0.9	0%	$43,850	$45,487	$47,347	1.7%	R, H
Community Development Manager	1.0	95%	$40,500	$41,600	$42,848	1.5%	R, H
Partnership Manager	1.0	0%	$38,500	$40,743	$41,965	1.5%	R, H
3 Construction Site Supervisors	3.0	0%	$78,873	$115,467	$118,931	4.2%	R, H
Mortgage Program Manager	0.75	0%	$33,597	$32,580	$33,557	1.2%	R, H
Development Associate	1.0	0%	$29,235	$29,539	$30,425	1.1%	R, H
Volunteer/Youth Programs Coord.	1.0	1%	$30,500	$26,749	$28,840	1.0%	R, H
ABWK/Critical Repair Supervisor	0.7	100%	$21,722	$22,452	$23,126	0.8%	R, H
Volunteers	10.6	9%	$0	$0	$0	0.0%	

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: Total Volunteer Hours = Volunteer FTE
  1,960

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Historic Hillsborough Commission/Burwell School Historic Site**

Street Address: 319 North Churton Street

Mailing Address: P.O. Box 922, Hillsborough, NC 27278

Website Address: www.burwellschool.org

Executive Director: Rebecca Ryan

Telephone: (919)732-7451 E-Mail:director@burwellschool.org

Contact Person: Rebecca Ryan

Telephone: (919)732-7451 E-Mail: director@burwellschool.org

Fax: (919)644-7577 Federal ID Number: 56-0850838

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$7,000	$9,000
Summary of intended use of funds: The Historic Hillsborough Commission (HHC) preserves the historic buildings, landscape, and collections of the Burwell School Historic Site. The HHC requests funding for FY 15-16 to: 1) support the ongoing preservation and maintenance of the Burwell School Historic Site for the continued enjoyment and safety of its visitors.; 2) support dedicated staff attention and resources to maintain and improve the programming and interpretive materials on site as the music building undergoes physical restorations planned for FY 15-16.		
Town of Chapel Hill	$	$
Summary of intended use of funds:		
Town of Carrboro	$	$
Summary of intended use of funds:		

Executive Director

1/22/2015
Date

Board Chair

22 January, 2015
Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation and Years in Operation:

      The Historic Hillsborough Commission (HHC) is a statutory commission created by an act of the 1963 North Carolina General Assembly. Since 1965, the HHC has owned, operated, and preserved the Burwell School Historic Site.

      The Commission members are representatives from the local community and are appointed by the NC Governor for six-year terms. The Commission meets regularly through the year to support its mission through working committees. Commissioners contribute an aggregate of approximately 1,450 hours of volunteer effort annually to the welfare of the Burwell School Historic Site. In addition, the Commission employs a small but highly effective staff of individuals who carry out the day to day operations, create exhibits and implement all the programs offered through this historic property.

   b. Mission or Vision Statement (if applicable):

      The mission of the HHC is "to maintain and preserve the Burwell School Historic Site; to interpret the history of 19th century Hillsborough for the enrichment of the public; and to celebrate and promote the culture and heritage of Hillsborough and Orange County."

   c. Brief History of Agency:

      In 1965, repairs and renovations to the Burwell School Historic Site were carried out by the Historic Hillsborough Commission and community volunteers who recognized the property's significance. By 1972, The Burwell School Historic Site was listed individually on the National Register of Historic Places.

      The site was the location of one of the state's earliest female academies, The Burwell Academy for Young Ladies, and the home of influential antebellum and Civil War households. Today, the Burwell School Historic Site is a two-acre property, which contains the Burwell residence (ca. 1821, 1848), the original brick classroom building of Robert and Margaret Anna Burwell's Academy for Young Ladies, known as the Music Building (ca.1837), and a rare brick Necessary House (ca. 1837).

      During the antebellum era, the property was the home of The Rev. Robert and Margaret Anna Burwell, their twelve children and the enslaved members of their household. On July 17, 1837, the Burwell's opened their landmark school, The Burwell Academy for Young Ladies. For two decades (1837–1857), the Burwell School educated over 200 young women in an academically rigorous curriculum designed by Mrs. Burwell to make them "thorough scholars and useful members of society."

The Burwell property was also the girlhood home of Elizabeth Hobbes Keckly, who was enslaved in the Burwell household as a teenager. Mrs. Keckly went on to become a successful businesswoman, author, activist, educator, and the confidante of First Lady Mary Todd Lincoln. In 2003, The Burwell School Historic Site was enhanced by the addition of a North Carolina State Road Marker commemorating the life and work of Elizabeth Hobbes Keckly.

In addition to preserving the buildings and landscape of the Burwell School, the HHC also fulfills its mission by offering programs designed to meet the needs of both local residents and tourists. Free docent-guided tours focus on life at the Burwell School from 1835-1857 when it was home to the Burwell family, the enslaved members of their household, and the students at the Burwell's landmark school for young women. The guided tours also actively interpret the site's Civil War history (1861-1865).

Today, the Burwell School is a unique landmark in Historic Hillsborough that serves as a community gathering place, hosting lectures, exhibits, and concerts. The site regularly welcomes elementary and middle school students to participate in classes compatible with the NC curriculum standards. Additionally, HHC hosts a range of special events including: living history demonstrations, Last Friday events, Blues at Burwell, Handmade Parade lawn party, and literary events with local authors. The site is also rented for weddings, parties and meetings.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

The Historic Hillsborough Commission meets the community's need for an accessible and inclusive connection to Orange County's past. The historic buildings and landscape of the Burwell School Historic Site offer a glimpse into a different century, while also playing a contemporary role as a gathering place where people celebrate the area's culture. The Burwell School is the only historic site in the community that is open to the public, free of charge, on a regular basis, year-round. It is also one of the only historic sites in Orange County at which the interpretation of 19th century women's history and African-American history plays a central role. Through its stewardship of the Burwell School and its varied programming, the Historic Hillsborough Commission strengthens the community by bringing Orange County's history to life, and making the ties to our past tangible to our visitors and the community.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Aside from the new and improved operational actions specifically outlined in the procedural objectives and evaluation method sections of this proposal, there will be no significant operational or financial changes in the program proposed FY 2015-2016 funding.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

The Historic Hillsborough Commission has made long-term financial sustainability a foremost priority in its strategic plan. The plan includes four key funding strategies: 1) seeking operational and project-based funding from grant-making agencies, 2) increasing earned income from special event fees and site rental fees, 3) continuing its community capital campaign and 4) leveraging non-financial resources such as volunteer time and in-kind donations from the community.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

The Burwell School enjoys a rich tradition of collaboration with a variety of organizations and outside agencies to fulfill its mission to interpret the history of 19th century Hillsborough for the enrichment of the public. The following is a summary of these partnerships:

•Public schools, private schools, and homeschool students: During the last fiscal year, the heritage education programs of the Burwell School brought local history to life for over 1000 local students. These educational programs are administered in cooperation with the Orange County Historical Museum and the Alliance for Historic Hillsborough. The Burwell School collaborated and participated in quarterly History Fun Days, which allow students to visit four historic sites in Hillsborough. These programs are instrumental in providing educational outreach to Orange County's public schools, private schools, and homeschool students. The Burwell School additionally participated in four Family Fun Days in conjunction with the Alliance for Historic Hillsborough and other local groups over the summer of 2014.
•Girl Scout Troops: Through our partnership with the Girl Scouts of North Carolina Coastal Pines, the Burwell School Historic Site developed programming for Daisy, Brownie, Junior and Senior Girl Scout Troops levels. Over 50 girl scouts received their women's history badge from the Burwell School last fiscal year. Through these ventures, we encounter students and their parents from all backgrounds, ethnicities, and demographics. During our FY 2015-16, we will continue to expand these programs to make them more appealing and appropriate for middle and high school students.
•UNC-Chapel Hill, Wilson Library: Over the last several years, the Burwell School collaborated with professionals at the Wilson Round Library at UNC Chapel Hill to digitize all of the site's genealogical records and publish on our website, free of charge to the public, through the People of the Burwell School project. While funding for the

project ended in 2012, the work continues, supported by volunteers from the research committee of the HHC.
•Hillsborough Chamber of Commerce, Downtown Merchants Association: The Burwell School Historic Site participated in the Hillsborough Chamber of Commerce's Candlelight Christmas Tour. 125 visitors came to the BSHS during the tour.
•The Apprend Foundation, Crafting Freedom, Thomas Day Project: The Burwell School collaborated with the Apprend Foundation and other groups to produce an African-American Heritage Tour, with the support of the National Endowment for the Humanities. This driving tour spans the historic road routes in Orange and neighboring counties and leads to influential heritage sites. The Burwell School is a destination site on the tour. This program launched summer 2011, free of charge.
•Orange County Historical Museum: For the seventh year in a row, we hosted a "Colonial Kids' Day," which was formerly known as "Felicity Day," in cooperation with the Orange County Historical Museum. This event is directed towards elementary aged students who have an interest in early American history, costumed interpretation, and life as it was during the American colonial period.
•Hillsborough Garden Club: Each spring, the Burwell School's Spurgeon Garden is a part of the Spring Garden Tour organized by the Alliance for Historic Hillsborough and the Hillsborough Garden Club.
•Alliance for Historic Hillsborough: Our site collaborates with the AHH with tours, Colonial Kid's Day, History Fun Days, Living History Tea, and Heritage Education Programming.
•Hillsborough Arts Council: HHC is proud to be the culmination space for the Hillsborough's Art Council's bi-annual *Handmade Parade*. In 2014, we welcomed over 1,000 parade participants to our lawn for music, food and celebration.
•Music Maker Relief Foundation: In 2013, the Burwell School Historic Site launched a new community event, the *Blues at Burwell* summer concert series. For the last two summers, HHC has partnered with the Music Maker Relief Foundation, and featured a series of local and regional blues artists including Ironing Board Sam, Ben Payton and Big Ron Hunter. The series was so well received, we plan to repeat in summer 2015 and continue this partnership.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

The Burwell Homecoming event, held June 14, 2014, intentionally contacted and invited participation from the descendants of slaves and other minority populations that lived or worked at the Burwell property since 1821. Local residents Rosetta Moore and Judge Beverly Scarlett presented lectures on the education of African-Americans in Orange County and tracing slave genealogy. The HHC is hopeful to uncover new connections to minority descendants through research supported by this program.

In partnership with local African American churches and community organizations, The HHC recently launched a new initiative to build on the enthusiasm of the 150th anniversary of the Emancipation Proclamation. The initiative will highlight the Burwell property as the girlhood home of Elizabeth Hobbes Keckly, who was enslaved in the Burwell household as a teenager. Mrs. Keckly went on to become a successful businesswoman, author, activist, educator, and the confidante of First Lady Mary Todd Lincoln.

Over the last several years, The Burwell School collaborated on an African-American Heritage Tour with the Apprend Foundation, the National Endowment for the Humanities, and other local historic organizations associated with African-American Heritage in Orange and neighboring counties. This tour debuted in summer 2011 and is available free of charge. The online resources are available at www.craftingfreedom.org. The Burwell School Historic Site will partner with the Apprend Foundation this summer to participate in the Crafting Freedom Workshop. This week long class will attract educators from across the nation for a seminar on the North Carolina African-American experience during the era of slavery. Educators visit sites along the African-American Heritage Tour, stopping at the Burwell School Historic Site. This workshop provides educators with lesson plans, videos, student handouts as well as access to local historians and professors who delve into the expanding scholarship on 19th century black experience and discuss critical themes in African- American history to help educators relay their experiences to students in a classroom setting.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X	X	X
Health and Nutrition				
Job Training				
Sports and Arts Activities	X	X	X	X
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other (local history and culture)	X	X	X	X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart. **If more than one program is requesting funding, provide a separate chart for each program**.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Improve access to educational information and increase awareness of cultural programming by developing new content for the Burwell School website.	For FY 13-14 HHC proposed the following: "Staff will develop new educational and cultural content for the www.burwellschool.org website, making the history of the Burwell School accessible to Orange County residents and prospective visitors." "The HHC will complete a design and technical update to its website and drafted new educational and cultural content starting July 1, 2013. The new website will launch on February 1, 2014."	The technical changes to the website are complete, and the new content launched on February 1, 2014, achieving our goal to improve access to information and programming for our constituents. The website will help to increase visitation to 7,000 visitors during the grant period. The new website and educational content improves accessibility for Orange County residents and encourages them to visit the Burwell School to enjoy free cultural programming offered throughout the year.	HHC measures visitation to the new website using an analytics program to track visitor traffic and interest. Staff also tracks event participation by counting every visitor to the Burwell School Historic Site and keeping a daily visitation log.

If program(s) did not meet its stated goal(s), please explain:

B. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart. **If more than one program is requesting funding, provide a separate chart for each program**.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Create a network of living descendants of the residents of the Burwell property to promote shared heritage and develop a lasting connection with the Burwell School Historic Site and Orange County. The HHC will host a first of its kind event, *A Burwell Homecoming,* a gathering of descendants of anyone who lived on the property, 1821-1965.	For FY 13-14 HHC proposed the following: "HHC will host *A Burwell Homecoming* June 14, 2014. Staff and the volunteer research committee will locate and contact descendants of past residents of the site including students, the Burwell family, the Spurgeon family, the Collins family, and others who resided on the property." "Staff and the volunteer research committee will use the initial outreach efforts to develop an invitation list, create and print mailings, and develop a customized agenda for the day."	HHC hosted *A Burwell Homecoming* on June 14, 2014. The research committee of the HHC identified and contacted over 300 descendants though outreach efforts and 150 property descendants and friends attended the event and participated in the day-long seminar. HHC began tracking subsequent visits by descendants and continues to reach out to new descendants that are identified through the event and the outreach process.	HHC implemented new tracking procedures for *A Burwell Homecoming* and descendant network. Staff will track outreach efforts and attendance at the homecoming event.

If program(s) did not meet its stated goal(s), please explain:

_____

C. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart. **If more than one program is requesting funding, provide a separate chart for each program**.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Maintain and preserve the Burwell School Historic Site, which requires frequent improvements for the continued enjoyment and safety of its visitors.	Provide for the continued upkeep and maintenance of the historic house and outbuildings. Staff regularly evaluates and identifies appropriate maintenance and upkeep requirements to support the health and vitality of the historic site and its buildings. During the current fiscal year, maintenance needs have included: furnace repairs, tree removal and power washing exterior of main structure.	Each year, HHC hosts approximately 7,000 visitors who will benefit from the improved safety and maintenance of the Burwell School Historic Site. Proactive upkeep and maintenance of the landmark buildings and grounds is essential to interpreting the history of the Burwell School and welcoming Orange County residents and the surrounding community to educational and cultural events. In FY 13-14, HHC replaced the furnace to the main residence and added safety features to the landscape.	HHC measures the program results using existing tracking methods. Burwell School staff counts every visitor to the Burwell School Historic Site and keeps a daily record of visitor feedback on the improved facility safety and ongoing safety concerns.

If program(s) did not meet its stated goal(s), please explain:

_____

D. FY 2015-16 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Maintain and preserve the Burwell School Historic Site, as outlined in our mission statement. The buildings and grounds require frequent improvements for the continued safety of its visitors.	Staff and the HHC building and grounds committee regularly evaluates and identifies appropriate maintenance and upkeep requirements to support the health and vitality of the historic buildings and property. During the upcoming fiscal year, maintenance needs will include: HVAC repairs, tree removal and re-painting of two exterior porches of the main structure.	Each year, HHC hosts approximately 7,000 visitors who will benefit from the improved safety and maintenance of the Burwell School Historic Site. Proactive upkeep and maintenance of the landmark buildings and grounds is essential to interpreting the history of the Burwell School and welcoming Orange County residents and the surrounding community to educational and cultural events.	HHC will measure the program results using existing tracking methods. HHC staff counts every visitor to the Burwell School Historic Site and keeps a daily record of visitor feedback on the improved facility safety and ongoing safety concerns.
Continue Music Building restorations.	During the FY 14-15, the building received a new roof and reppointment to chimney's masonry. In FY 15-16, HHC will continue to restore the 1837 Music Building by repointing the exterior walls masonry and repairing interior plasterwork.	HHC anticipates completion of all restoration work to the Music Building.	Increased publicity of preservation efforts will bring visitors to the site. HHC will measure the program results using existing tracking methods.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Historic Hillsborough Comission

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 7,000	$ 7,000	$ 9,000	29%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	$ 7,000	$ 7,000	$ 9,000	29%
PROGRAM EXPENSES				
Compensation	$ 2,443	$ 2,500	$ 3,500	40%
Rent & Utilities	$ 2,064	$ 2,000	$ 2,500	25%
Supplies & Equipment	$ 459	$ 500	$ 500	0%
Travel & Training				0
Other Expenses:	$ 2,034	$ 2,000	$ 2,500	25%
Please list 3 largest "Other Expenses":				
Maintenance and Safety $ 2,034.00				
$ -				
$ -				
Total Program Expenses	$ 7,000	$ 7,000	$ 9,000	29%
SURPLUS/(DEFICIT) FOR PERIOD:	$ -	$ -	$ -	0

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: A visitor, event attendee or activity participant who engages with the community, educational or cultural heritage programming of the Burwell School Historic Site.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	7,152	7,152	$7,000	$0.98
Estimated FY14-15	7,000	7,000	$7,000	$1.00
Projected FY15-16	7,000	7,000	$9,000	$1.29

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**	Unknown	Unknown	Unknown
Male	44%	45%	45%	Durham City			
Female	56%	55%	55%	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	18%	20%	22%	Wake County			
Caucasian	74%	73%	71%	Town of Chapel Hill			
Hispanic	4%	4%	4%	Town of Carrboro			
Other	4%	3%	3%	Orange County			
3. **Age**				Other (specify)			
0-5 Years	6%	4%	4%				
6-18 Years	30%	32%	32%	Per cent of clients at, or below, federal poverty level			
19-50 Years	31%	32%	32%				
51+ Years	33%	32%	32%				
Unknown				***TOTAL # OF CLIENTS SERVED***	7,152	7,000	7,000

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Historic Hillsborough Commission**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 43,785	$ 39,500	$ 39,500	0%
Agency Generated Revenue (fees)	$ 8,559	$ 5,980	$ 5,000	-16%
Local Government Grants:				
Orange County	$ 7,000	$ 7,000	$ 9,000	29%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local: Town of Hillsborough Tourism E	$ 23,000	$ 19,500	$ 22,000	13%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: F.M. Kirby Foundation	$ 10,000	$ 10,000	$ 10,000	0%
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellaneous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 92,344**	**$ 81,980**	**$ 85,500**	**4%**
AGENCY EXPENSES				
Compensation	$ 46,684	$ 52,444	$ 52,444	0%
Utilities, Maintenance & Insurance	$ 21,403	$ 20,515	$ 21,906	7%
Supplies & Equipment	$ 5,388	$ 3,150	$ 3,150	0%
Travel & Training	$ -	$ -	$ -	0%
Other Expenses:	$ 21,216	$ 8,000	$ 8,000	0%
Please list 3 largest "Other Expenses":				
Professional Services	*$ 10,356*	*$ 2,500*	*$ 2,500*	
Fundraising Expenses	*$ 6,915*	*$ 4,500*	*$ 4,500*	
Miscellaneous	*$ 3,946*	*$ 1,000*	*$ 1,000*	
Total Agency Expenses	**$ 94,691**	**$ 84,109**	**$ 85,500**	**2%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (2,347)**	**$ (2,130)**	**$ -**	**100%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	0.8	0%					H
Weekday Docent	0.5	35%	$1,525	$2,000	$2,500	28%	
Weekend Docent	0.2	60%	$918	$500	$1,000	11%	
Volunteer Commissioners	2.0						

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Historical Foundation of Hillsborough and Orange County**

Street Address: 201 N. Churton Street, Hillsborough, NC 27278

Mailing Address: 201 N. Churton Street, Hillsborough, NC 27278

Website Address: www.orangeNChistory.org

Executive Director: Candace Midgett

Telephone: 919.732.2201 E-Mail: director@orangeNChistory.org

Contact Person: Candace Midgett

Telephone: 919.732.2201 E-Mail: director@orangeNChistory.org

Fax: N/A Federal ID Number: 56-0797289

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$6,000	$8,000
Summary of intended use of funds: Awarded funds would be used to support the operations of the Orange County Historical Museum, which is directed by the Historical Foundation of Hillsborough and Orange County. Awarded monies would be used to fund personnel expenses associated with the Museum's ongoing Heritage Education Programs and public education through offering exhibitions and maintaining collections.		
Town of Chapel Hill	$	$
Summary of intended use of funds:		
Town of Carrboro	$	$
Summary of intended use of funds:		

Executive Director

01. 23 2015

Date

Board Chair

1-23-2015

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: The Orange County Historical Museum was incorporated in 1983. The Historical Foundation of Hillsborough and Orange County was incorporated in 2007.

   b. Years in Operation: The Historical Foundation for Hillsborough and Orange County has been in operation for eight years, and the Orange County Historical Museum for fifty-eight.

   c. Mission or Vision Statement (if applicable): The mission of the Historical Foundation for Hillsborough and Orange County is to enlighten and engage our community and visitors from around the world by preserving and interpreting the history of Hillsborough and Orange County.

      Goals include:
      1. Operate the Orange County Historical Museum
      2. Collect, preserve, catalog, and house historic artifacts and documents relevant to Hillsborough and Orange County history
      3. Use collections as a tool for educating the public through outreach, including a exhibitions, public programs, publications, and special events
      4. Make historic documents, artifacts, photographs and other records available to researchers
      5. Provide support and assistance for historic preservation efforts in Hillsborough and Orange County

   d. Brief History of Agency: The Orange County Historical Museum opened in November 1957. The Museum was incorporated in 1983 when it moved to its present location at 201 N. Churton Street. In 2007, the Museum merged with the Hillsborough Historical Society to create the Historical Foundation of Hillsborough and Orange County, which continues the operation of the Museum.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). IF MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.
   Program 1: Heritage Education Programs. The Museum's Heritage Education

Programs provides school children a free, positive, interactive learning experience focusing on Orange County history. These programs are created for easy travel to the schools and provide children with an enriching educational experience that may otherwise be denied by school budget limitations and time constraints. The Museum uses feedback from participants to develop an array of programs to fill the needs of teachers, parents, and children. The Museum's programs have 14,057 children since 2008.

Programs include:
1. Three traveling trunks containing lesson plans, activities, and objects for teachers to incorporate into the classroom
2. Seven interactive programs covering the American Indians of Orange County, the Colonial Period, the Revolutionary War, the Civil War, and mill workers of Orange County
3. The Museum is also a part of "Teaching with Historic Hillsborough Sites" and participates in collaborative learning programs with the Alliance for Historic Hillsborough and the Burwell School

Program 2: Education through Exhibits. The Museum provides the community with a connection to the past by preserving the rich history of Orange County, one of the oldest counties in the state, and a center for American Indian, Colonial, antebellum, and twentieth-century history. The Orange County Historical Museum is the only historical museum in Orange County, and the only historical institution with a mission to preserve and interpret Orange County history. The Museum provides both permanent and temporary exhibits.

Program 3: Preserve and Make Accessible Orange County Artifacts: The Museum acts as a steward for the county's historical artifacts, offering security and preservation for its holdings. The Museum makes its collections and archives available to the public both physically and digitally. Museum staff members assist with and conduct research for the public. In addition, the Museum routinely seeks to conserve unique at-risk Orange County artifacts. In 2013, the Museum's Orange Guard Flag, the only known existing Civil War era flag from Orange County, was named one of North Carolina's Most Endangered Artifacts after the Museum applied for and received a grant from the National Endowment for the Humanities to have conservators examine the flag. With continued conservation efforts and research, the Museum will be in a unique position to educate citizens about the history of the Orange Guard.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Candace Midgett has recently taken on the role of Executive Director at the Museum. She will take on the same programmatic roles as our previous Executive Director. No other operational or financial changes are being considered at this time.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

Program 1: The Foundation anticipates support from the Orange County Outside Agency Grant, an ongoing source of funding for the Heritage Education Programs. With this grant, the Museum has been able to offer its Heritage Education Programs free of charge to Orange County schools since 2010. Feedback received in a 2013 survey of teachers who utilized our programs shows that the availability of free, quality interactive educational opportunities is valued. Many of the teachers stated that they intended to use these free programs in the future.

Program 2: The Foundation anticipates support from the Orange County Outside Agency Grant and the Hillsborough Tourism Board Grant, both of which being ongoing sources of funding for exhibit expenses.

Program 3: The Foundation will seek a grant from the Marion S. Covington Foundation to conserve the Orange Guard flag. The Foundation will also work with the North Carolina Preservation Consortium to raise funds to aid in collection conservation expenses. We are working with both organizations on an ongoing basis.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

Program 1:

- The Museum collaborates with the Burwell School and the Alliance for Historic Hillsborough to create and provide historical educational opportunities, such as History Fun Days and Colonial Kids Day.
- The Museum collaborates with teachers from Orange County, Chapel Hill-Carrboro, and Durham County schools to receive feedback and suggestions for improving and increasing participation in the Heritage Education Programs.

Program 2:

- The Museum collaborated with the Occoneechee Orange Historic Speedway Group to create an exhibition about the history of the Speedway and to provide a program featuring some of the individuals involved in that history.
- The Museum collaborates with various universities to offer students an opportunity to assist in the research and creation of both physical and digital exhibits, as well as the care and preservation of collections. This includes UNC Chapel Hill, UNC Greensboro, The College of William and Mary, and Western Carolina University.

Program 3:

- The Museum collaborates with the Hillsborough Branch of the Orange County Library to assist researchers with genealogical inquiries.

- The Museum works with UNC Greensboro and UNC Chapel Hill to educate and provide students with experience in collections management and conservation.
- The Museum collaborates with the Burwell School and the Alliance for Historic Hillsborough by loaning collections to aid community education on Orange County history.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Program 1: The Museum works with public schools in Orange County and provides programs to diverse audiences. The topics of the Heritage Education Programs cover an ethnically diverse population, including African Americans and American Indians. Programs have been provided to dual language classes, combined grade level classes, and special education classes. All of the Heritage Education Programs are developed to be flexible enough to serve the needs of any audience.

Program 2: The Museum is free of charge to the public and open Tuesday through Saturday from 11 a.m. to 4 p.m., with Sundays from 1 p.m. to 4 p.m. The Foundation makes a conscious effort to keep the Museum open as many hours as funding will allow. The Museum strives to create exhibits highlighting the different ethnic and minority groups of Orange County. For example, in 2014 the Museum highlighted the African American race car drivers in its exhibition *From Horses to Horsepower: The History of the Occoneechee Speedway.* These groups are also included in permanent exhibits documenting the history of the county. The Museum's blog last February highlighted some notable African American residents of Orange County, and worked with the Central High Reunion Committee to create a digital exhibit about the history of that segregated high school. The Museum also published a digital chapter from a thesis about early education efforts for African Americans in Orange County.

Program 3: The Museum houses and cares for artifacts that represent the diverse history of Orange County, including African American and American Indian populations. The Museum reaches out to leaders of these communities to accurately interpret their history. For example, the Museum continues to work with John Jefferies to analyze the construction methods and uses of Occaneechee Indian artifacts.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	x	x	x	x
Health and Nutrition				
Job Training				
Sports and Arts Activities	x	x	x	
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Provide 2,500 children with an interactive learning experience	**The Executive Director provides Heritage Education Programs and participates in collaborative events. Traveling Trunks are rented to teachers.**	**3,036 Orange County children were served by one of the Museum's Heritage Education Programs, Traveling Trunks or by attending a collaborative history event.**	**The Executive Director kept record of the number of children served.**

Program2:

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Provide 8200 visitors an educational opportunity through the Museum's exhibits and archives.	**Staff and volunteers will mount special exhibits and plan programs that make community history available to the public.**	**The Museum educated 8,610 visitors through the Museum's exhibits and archives.**	**Museum staff recorded the number of visitors to the Museum and Museum Programs.**

Program 3:

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Aid researchers with 25 inquiries utilizing archive.	**Staff assists researcher's inquiries by providing information held in the Museum's archives.**	**Staff assisted 31 researchers with a variety of historical topics, utilizing the Museum's archival collection.**	**Staff recorded the number of researchers assisted.**

If program(s) did not meet its stated goal(s), please explain:

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Program1:

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Serve at least 2,500 children by providing Heritage Education Programs, Traveling Trunks, or through Collaborative History Events.	**The Executive Director provides Heritage Education Programs, both in the classroom and at the Museum. The Executive Director rents Traveling Trunks to teachers and participates in collaborative history events.**	**The Museum anticipates at least 2,500 Orange County children will be served by one of the Museum's Heritage Education Programs**	**The Executive Director will keep record of the number of children served.**

Program2:

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
The Museum will educate 9,000 visitors with both permanent and special exhibits.	**Staff and volunteers will mount special exhibits and plan programs that make community history available to the public.**	**The Museum anticipates educating 9,000 visitors with exhibits and collections.**	**The Museum staff will record the number of visitors to the Museum and Museum Programs.**

Program 3:

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
The Museum will assist 25 researchers with their inquiries.	**Staff will assist researchers by providing information on history and collections that is housed in the Museum**	**The Museum will assist at least 25 researchers with their Orange County history related questions.**	**The Museum staff will record and track the number of researchers assisted, including the amount of time required to assist researchers.**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Historical Foundation of Hillsborough (Orange County Historical Museum)**

PROGRAM REVENUE: Program 1	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)	$ 150	$ 650	$ 650	0%
Local Government Grants:				
Orange County	$ 1,000	$ 2,000	$ 2,000	0%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 1,150**	**$ 2,650**	**$ 2,650**	**0%**
PROGRAM EXPENSES				
Compensation	$ 749	$ 2,000	$ 2,000	0%
Rent & Utilities				0
Supplies & Equipment	$ 98	$ 350	$ 350	0%
Travel & Training	$ 305	$ 300	$ 300	0%
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Program Expenses	**$ 1,152**	**$ 2,650**	**$ 2,650**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (2)**	**$ -**	**$ -**	**0**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Historical Foundation of Hillsborough (Orange County Historical Museum)**

PROGRAM REVENUE: Program 2	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 3,704	$ 3,384	$ 3,500	3%
Program Generated Revenue (fees)	$ 3,704	$ 3,383	$ 3,500	3%
Local Government Grants:				
Orange County	$ 1,000	$ 2,000	$ 4,000	100%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local: Hillsborough Tourism Board	$ 7,895	$ 6,000	$ 7,500	25%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 16,303**	**$ 14,767**	**$ 18,500**	**25%**
PROGRAM EXPENSES				
Compensation	$ 12,208	$ 12,572	$ 14,572	16%
Rent & Utilities				0
Supplies & Equipment	$ 500	$ 200	$ 500	150%
Travel & Training				0
Other Expenses:	$ 3,595	$ 1,995	$ 3,428	72%
Please list 3 largest "Other Expenses":				
Marketing $ 3,428.00				
$ -				
$ -				
Total Program Expenses	**$ 16,303**	**$ 14,767**	**$ 18,500**	**25%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Historical Foundation of Hillsborough (Orange County Historical Museum)**

PROGRAM REVENUE: Program 3	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 1,000	$ 727	$ 750	3%
Program Generated Revenue (fees)	$ 809			0
Local Government Grants:				
Orange County	$ 1,000	$ 2,000	$ 2,000	0%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local:				0
Other Local:				0
Other Local:				0
provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 2,809**	**$ 2,727**	**$ 2,750**	**1%**
PROGRAM EXPENSES				
Compensation	$ 2,163	$ 2,227	$ 2,250	1%
Rent & Utilities				0
Supplies & Equipment	$ 646	$ 500	$ 500	0%
Travel & Training				0
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Program Expenses	**$ 2,809**	**$ 2,727**	**$ 2,750**	**1%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (0)**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

Program1:

1) **Define one unit of service**[+]: One unit of service is equal to a staff person providing an interactive learning experience to one child

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost / Total Program Units that Met Goal
Actual FY13-14	3,036	3,036	$1,152	$0.38
Estimated FY14-15	2,500	2,500	$2,650	$1.06
Projected FY15-16	2,500	2,500	$2,650	$1.06

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Program 2:

2) **Define one unit of service**[+]: One unit of service is equal to the Orange County Historical Museum providing historical information to one visitor

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost / Total Program Units that Met Goal
Actual FY13-14	8,610	8,610	$16,303	$1.89
Estimated FY14-15	9,000	9,000	$14,767	$1.64
Projected FY15-16	9,000	9,000	$18,500	$2.05

Program 3:

1) **Define one unit of service**[+]: One unit of service is equal to the Orange County Historical Museum staff assisting one researcher with a historical inquiry requiring use of the Museum's collections and historical information.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost / Total Program Units that Met Goal
Actual FY13-14	31	31	$2,809	$90.61
Estimated FY14-15	25	25	$2,727	$109.08
Projected FY15-16	25	25	$2,750	$110

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Heritage Education

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	1054	1250	1250	Durham City			
Female	1110	1250	1250	Durham County	110	100	100/
2. **Ethnicity**				Raleigh City			
African-American	325	425	425	Wake County			
Caucasian	1395	1400	1400	Town of Chapel Hill	691	650	650
Hispanic	308	425	425	Town of Carrboro	82	75	75
Other	136	250	250	Orange County	1833	1675	1675
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years	2716	2500	2500	Per cent of clients at, or below, federal poverty level	unknown	unknown	Unknown
19-50 Years							
51+ Years					3,036/8610	2500/9000	2,500/9000
Unknown				***TOTAL # OF CLIENTS SERVED***			

*The Museum does not track demographics at collaborative historic education events and programs.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Exhibits and Museum Visitors

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male				Durham City	21	550	550
Female				Durham County	23	550	550
2. **Ethnicity**				Raleigh City	19	550	550
African-American				Wake County	27	550	550
Caucasian				Town of Chapel Hill	37	750	750
Hispanic				Town of Carrboro	13	750	750
Other				Orange County	74	1200	1200
3. **Age**				Other (specify)	318	4100	4100
0-5 Years							
6-18 Years				Per cent of clients at, or below, federal poverty level	unknown	unknown	Unknown
19-50 Years							
51+ Years					8610	9000	9000
Unknown				***TOTAL # OF CLIENTS SERVED***			

*The Museum does not capture statistics on gender, ethnicity, and age from visitors. The Museum gathers the above information from a voluntary visitor sign in sheet. These numbers do not reflect all of the visitors to the Museum.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Heritage Education/Exhibits and Museum Visitors

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male				Durham City			
Female				Durham County			
2. **Ethnicity**				Raleigh City			
African-American				Wake County			
Caucasian				Town of Chapel Hill			
Hispanic				Town of Carrboro			
Other				Orange County		20	20
3. **Age**				Other (specify)		5	5
0-5 Years							
6-18 Years				Per cent of clients at, or below, federal poverty level	unknown	unknown	unknown
19-50 Years							
51+ Years							
Unknown				***TOTAL # OF CLIENTS SERVED***	31	25	25

*The Museum has not tracked this information on researchers prior to 2014

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Historical Foundation of Hillsborough and Orange County**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 11,396	$ 4,800	$ 5,280	10%
Agency Generated Revenue (fees)	$ 5,606	$ 15,000	$ 16,500	10%
Local Government Grants:				
Orange County	$ 3,000	$ 6,000	$ 8,000	33%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local: Tourism Board	$ 23,000	$ 22,700	$ 25,000	10%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 26,006	$ 13,700	$ 16,500	20%
Please list 3 largest Miscellanous sources:				
Vanguard Investments $ 15,243.00				
s Services(incl Home for Holida $ 8,750.00				
Gift Shop Sales $ 2,065.00				
Total Agency Revenue	**$ 69,008**	**$ 62,200**	**$ 71,280**	**15%**
AGENCY EXPENSES				
Compensation	$ 40,852	$ 41,125	$ 45,200	10%
Rent & Utilities	$ 5,721	$ 6,120	$ 6,700	9%
Supplies & Equipment	$ 1,420	$ 4,033	$ 4,000	-1%
Travel & Training		$ 200	$ 200	0%
Other Expenses:	$ 19,761	$ 13,574	$ 14,500	7%
Please list 3 largest "Other Expenses":				
Accounting Fees $ 9,100.00				
Advertising-Indy Week $ 6,597.00				
Insurance $ 1,777.00				
Total Agency Expenses	**$ 67,754**	**$ 65,052**	**$ 70,600**	**9%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 1,254**	**$ (2,852)**	**$ 680**	**124%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Historic Foundation of Hillsborough and Orange County

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	.75	17%(1) 17%(2) 16%(3)	$25,000	$24,583	$29,000	40%	
Museum Coordinator (created September 2014)	.50	90%(2) 10%(3)	N/A	$5,360	$5,750	20%	
Museum Interpreter	.25	90%(2)	$3,536	$3,536	$3,710	5%	
Assistant Director (ended 7/2014)	.50	90%(2) 10%(3)	$6,435	N/A	N/A	N/A	
Volunteer (OCHM)	.25	75%(2) 25%(3)	N/A	N/A	N/A	N/A	
Volunteer(HFHOC)	.51	(10%)2	N/A	N/A	N/A	N/A	

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: Total Volunteer Hours = Volunteer FTE/1,960

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Housing for New Hope, Inc.

Street Address: 18 West Colony Place, Suite 250, Durham, NC 27705

Mailing Address: 18 West Colony Place, Suite 250, Durham, NC 27705

Website Address: www.housingfornewhope.org

Executive Director: Gretchen Senez

Telephone: 919-489-6282 E-Mail: Gretchen@housingfornewhope.org

Contact Person: Joi Stepney

Telephone: 919-489-6282 E-Mail: joi@housingfornewhope.org

Fax: 919-489-6593 Federal ID Number: 58-2089068

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$ 22,000	$ 22,500
Summary of intended use of funds: Funds are intended to provide services to homeless individuals in Orange County. These services intend to help homeless people find housing by engaging them through street outreach, case management, housing counseling, and assistance in navigating resources, thus breaking the cycle of homelessness.		
Town of Chapel Hill	$ 2,500	$ 2,500
Summary of intended use of funds: Funds are intended to provide services to homeless individuals in Orange County. These services intend to help homeless people find housing by engaging them through street outreach, case management, housing counseling, and assistance in navigating resources, thus breaking the cycle of homelessness.		
Town of Carrboro	$ 3,300	$ 3,500
Summary of intended use of funds: Funds are intended to provide services to homeless individuals in Orange County. These services intend to help homeless people find housing by engaging them through street outreach, case management, housing counseling, and assistance in navigating resources, thus breaking the cycle of homelessness.		

Executive Director

1/23/15
Date

Board Chair

1/23/15
Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:
   Housing for New Hope's (HNH) year of incorporation was 1992.

   b. Years in Operation:
   Housing for New Hope has provided services to homeless individuals and families for 23 years.

   c. Mission or Vision Statement (if applicable):
   Housing for New Hope's mission is to prevent and end homelessness by providing access to housing, healthcare, and integrated services in the Triangle.

   d. Brief History of Agency:

   Housing for New Hope was founded by Terry Allebaugh in 1992. Our goal was and continues to be to provide services, support, street outreach, financial assistance, and housing to those in need. HNH provides a wide variety of housing options for homeless individuals and families in Orange and Durham Counties as well as preventative measures for those at risk of homelessness Durham County. HNH has established longstanding partnerships with local mental health providers, substance abuse support groups and homeless advocates in order to help the people we serve meet their housing needs and achieve their self-determined goals.

   HNH has increased its range of services over the years to include:

   - **Assertive Engagement:** Case management for homeless individuals with mental illness and/or substance abuse diagnoses who have substantial service needs.
   - **SSI/SSDI Outreach, Access, and Recovery (SOAR):** SOAR is a program that is designed to increase access to the disability income benefits programs administered by the Social Security Administration (SSA) for homeless individuals who have mental health disabilities and/or a co-occurring substance use disorder. Because homeless individuals may not have access to needed documentation or the ability to gather it, this program was created to provide assistance and streamline the process; getting the individual income and housed faster. HNH is one of the few agencies in North Carolina with a full-time SOAR benefits specialist and a staff member in Orange County also has been SOAR trained.
   - **Workforce Housing:** HNH owns and operates Cole Mill Place, an apartment complex for families at or below 50% of the area median income (AMI).
   - **Rapid Re-Housing:** Designed to help a homeless individual or family move as quickly as possible to their own permanent housing. Participants receive rental assistance as well as other housing stabilization services.

- **Homeless Prevention:** Financial assistance for rent, utilities, and medical bills to help seniors and households with children maintain their current housing.
- **Jail Diversion:** The Durham Detention Center notifies HNH staff of inmates who will be homeless upon their release. Staff works to connect recently released individuals to mental health services and housing.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Housing for New Hope strives to enhance the community health of Orange County, Chapel Hill, and Carrboro by providing services to homeless individuals, with a special focus on those living with mental health disorders. These are the area's most needy and disadvantaged residents, and in providing services for them, Housing for New Hope seeks to address the community's needs with the following practices:

- **Canvassing the Streets and Abandoned Houses:** The HNH team regularly searches the streets of Orange County, Chapel Hill, and Carrboro. Utilizing their unique knowledge of homelessness in the area and the trust they have established with the homeless population, they are able to efficiently and effectively search the community to find those in need. This search takes them to places such as highway underpasses, condemned buildings, and vacant homes.
- **Housing Placement and Financial Assistance for Homeless Individuals:** Once HNH staff identifies a homeless individual or family, they then complete a needs assessment. Based on this assessment, HNH staff develops an action plan which includes the individual or family's needs, assets, strengths, and wishes. The action plan outlines a strategy that connects the individual or family to a primary doctor for medical needs, assisting with applications for social service benefits, locating appropriate housing, and providing short to long term financial assistance. Financial assistance includes but is not limited to rent, utilities, and deposits.
- **Assist Law Enforcement:** HNH continues to maintain a long-standing relationship with police departments and EMS. HNH staff members in Orange County, Chapel Hill, and Carrboro serve as a first point of contact when a homeless individual is observed in dangerous or disruptive situations.
- **Support Local Business Owners:** Aware of the importance of small businesses to the community, HNH staff members act as a resource for business owners when homeless individuals are noticed within or around their establishments. These individuals are offered something beyond what short-term pan-handling can provide; they are assisted by HNH staff with finding employment, housing, and mental health services.

- **Point-in-Time (PIT) Count Leadership:** The PIT Count is a nationwide, unduplicated survey of the homeless population, held annually on one night during the last week of January. The count provides a snapshot of who is homeless on a given night and the information that is collected is used to improve homeless assistance systems and to raise awareness of homelessness. Utilizing their outreach experience, HNH staff members act as team leaders for the count, helping to find unsheltered homeless individuals in the hardest-to-reach locations.
- **Access to Long-term Housing:** When an individual or family is approved for low income housing through any public housing authority, they are required to put down a rental deposit or the utility company may require a deposit. Both of those cost become a barrio to housing because the housing authority is not allowed to provide assistance with deposits. HNH provides those initial deposits only so homeless households can get into housing and be enrolled into the housing authority's permanent housing program.
- **Provide Public Education:** HNH staff members provide ongoing education regarding homelessness in the area. Staff visit local schools, agencies, and business owners and distributes information regarding local resources on how to best assist someone who is homeless.
- **Affordable Housing Units:** Starting in September, Housing for New Hope will obtain six permanent supportive housing apartment units from the University of North Carolina – Chapel Hill. These units will be used to provide housing to the area's homeless individuals who ranked the highest risk of death if left unsheltered.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Housing for New Hope is requesting an additional 2% increase in funding from Orange County Outside Agency Funding. Since our Lincoln Community Health Center grant ended during 2013, funding is vital to assist the area's homeless population with housing, prescriptions, transportation to health care facilities, personal supplies, and other personal needs. Your funding will help us to maintain 2 full time employees working in Orange County.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

Ongoing federal funding for the Homeless Outreach Case Manager position is through a contract with PBH/Cardinal Innovations Healthcare Solutions. This contract is renewed annually, based on demonstrated outcomes, and we anticipate continued annual renewals.

We plan to continue utilizing our strong network of area in-kind donors and volunteers, such as the UNC Psychiatry Resident, who volunteers with our Orange County outreach team.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- **Law Enforcement:** HNH maintains a close working relationship with local law enforcement. The Crisis Units of local police departments, along with service providers from HNH and other local agencies, participate in the monthly 100K Homes Taskforce meetings, which provide a great opportunity to share information regarding particularly difficult-to-serve homeless individuals. Between meetings, HNH staff and police communicate by e-mail and phone to address the problems of homeless individuals in the community and seek successful outcomes.

- **Providers:** Service providers including Cardinal Innovations, Freedom House Recovery Center, and local Oxford Houses are also close professional partners. These organizations provide mental health and substance abuse services which are often crucial for the disadvantaged homeless individuals and families. Other agency partners include Carolina Outreach and the STEP clinic, which provide CST or ACT (intensive psychiatric support) team services to referred clients.

- **Local Landlords:** Since affordable housing is scarce, Housing for New Hope's relationship with local landlords such as Dunlap Lilly Property Management is essential in securing permanent housing for people with low incomes. Housing agencies, like the Orange County Housing Authority, CASA, and Empowerment, Inc. are also important partners for HNH. With HNH endorsement and partnership, many of these entities have been willing to consider renting to individuals with unfavorable rental histories, which is an obstacle for many homeless individuals.

- **Partners:** The Community Empowerment Fund (CEF) is another important partner organization. CEF provides financial literacy and employment skills training to the individuals we serve in Chapel Hill and Durham; empowering people by developing skills, such as opening and maintain a savings account, which is an essential component of maintaining housing.

- **Community Collaboration:** UNC's Center for Excellence's Critical Time Intervention (CTI) Team, has worked closely with HNH in making referrals or transitioning case management for complex consumers. The CTI Team provides up to nine months of intensive case management and therapy for clients who have difficulty engaging with traditional services. Both HNH and CTI are active participants in the city-wide, 100K Homes Taskforce.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

The staff at HNH is diverse in terms of gender and race, as well as degrees from formal education. Diverse staff, several of whom are formerly homeless, are able to relate to and work with a diverse client population on the programmatic, ground level. The HNH Board of Directors is also diverse, ensuring that the mission and vision of the organization takes into account a wide variety of perspectives. No less than one formerly homeless person serves HNH's board at any point of time. To further enhance cultural competence and ensure ethnic and minority groups are being engaged, all staff are required to complete in-service hours which include cultural sensitivity training and other diversity awareness subjects. In order to be easily accessible to people from different backgrounds, HNH offices are geographically diverse and placed strategically within the community.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition		X		X
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing		X		X
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
145 individuals outreached within the community	Team provides street outreach to find homeless individuals in known and new places such as vacant homes, buildings, abandoned vehicles and camps.	108 individuals were outreached during street canvasing activities. 74% of goal due to new targeting method for outreaching the most vulnerable.	Program staff keeps detailed documentation of outreach numbers for agency and state records.
Enroll 60 individuals in ongoing case management including connecting to mental health services, primary care, mainstream benefits, etc.	Case manager provides one-on-one assistance to help individuals schedule and attend mental health appointments. There is also assistance with applications for food stamps, Medicaid, and other social services.	57 individuals were enrolled into ongoing case management. 95% of goal.	Program staff keeps detailed documentation of outreach numbers for agency and state records.
Provide 60 individuals with housing counseling to obtain and maintain permanent housing	Case manager takes homeless individuals to local landlords who are willing to work with this disadvantaged population. Other activities include budgeting and housekeeping and life skills.	106 individuals were provided housing counseling and assistance. Goal exceeded by 46. 177%. We had a stronger emphasis on housing education the grant cycle.	Program staff keeps detailed documentation of assistance for agency and state records.
Secure permanent housing for at least 50 homeless households	Moving assistance, as well as short-term and long-term financial assistance provided based on need. Ongoing tracking of housing stability.	29 households were assisted with securing permanent housing (for a total of 40 individuals). 73% of goal due to serving a higher need/risk population.	Program staff keeps detailed documentation of individuals placed in housing for agency and state records.
80 individuals receive medical navigation services	N/A	0 individuals received medical navigation services. The pilot project funding our street outreach nurse ended.	N/A

If program(s) did not meet its stated goal(s), please explain:

To provide services to the population most at risk, the PATH program has incorporated targeting methods that assist in identifying who has a serious mental illness and homeless. In addition, the 100K Homes Taskforce's vulnerability tool ensures that our program serves the most fragile, unsheltered individuals. We have usually far exceeded our outreach goals in years past until this systematic change. Our housing placement numbers are lower than anticipated due to targeting chronically homeless households (households which have been homeless for at least a year or experienced numerous episodes of homelessness in the past three years) for financial assistance. We serve the most "difficult to house" population - individuals who are vulnerable because of their extreme health and housing barriers. We were not able to provide medical navigation services, other than navigation provided as part of normal case management, because of the pilot program ending before the FY 13/14 grant cycle began.

B. FY 2015-16 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
102 individuals outreached within the community	The street outreach team canvases for homeless individuals in known and new places such as vacant homes, buildings, abandoned vehicles and camps.	102 individuals are anticipated to be outreached during street canvasing activities. (Using strategic targeting methods to reach the most vulnerable/at risk)	Program staff will keep detailed documentation of outreach logs for agency and state records.
Enroll 50 individuals in ongoing case management including connecting to mental health services, primary care, mainstream benefits, etc.	Case manager provides one-on-one assistance to help individuals schedule and attend mental health and various other appointments. Assistance with applications for food stamps, Medicaid, and other social services is also provided.	50 individuals are anticipated to be enrolled into ongoing case management.	Program staff keeps detailed documentation of all case management provided for agency and state records.
Provide 60 individuals with housing counseling to obtain and maintain permanent housing	Case manager advocates for homeless individuals to local landlords who may be willing to work with this disadvantaged population. Other activities include budgeting, housekeeping and life skills.	60 individuals are anticipated to be provided with housing counseling.	Program staff keeps detailed documentation of housing counseling for agency and state records.
Secure permanent housing for at least 45 homeless individuals	Moving assistance, short-term and long-term financial assistance will be provided based on needs assessment. Ongoing tracking of housing stability.	45 individuals are anticipated to be assisted with securing permanent housing.	Program staff keeps detailed documentation of permanently housed individuals for agency and state records.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: HOUSING FOR NEW HOPE

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 19,600	$ 4,500	$ 4,725	5%
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 20,000	$ 22,000	$ 22,500	2%
Town of Chapel Hill	$ 5,000	$ 2,500	$ 2,500	0%
Town of Carrboro	$ 3,000	$ 3,300	$ 3,500	6%
Other Local: Cardinal Innovations/PATH	$ 65,167	$ 85,167	$ 87,722	3%
Other Local: CDBG	$ 6,000	$ 6,000	$ 6,500	8%
Other Local: HOME Funds	$ 18,393	$ 33,954	$ 50,000	47%
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Lincoln Comm Health Ctr.	$ 8,525	$ -	$ -	0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 145,685**	**$ 157,421**	**$ 177,447**	**13%**
PROGRAM EXPENSES				
Compensation	$ 94,538	$ 96,328	$ 99,218	3%
Rent & Utilities	$ 8,038	$ 6,360	$ 6,487	2%
Supplies & Equipment	$ 3,897	$ 3,129	$ 3,223	3%
Travel & Training	$ 7,700	$ 6,175	$ 6,422	4%
Other Expenses:	$ 32,672	$ 45,429	$ 62,097	37%
Please list 3 largest "Other Expenses":				
Client Assistance $ 32,672.00				
$ -				
$ -				
Total Program Expenses	**$ 146,845**	**$ 157,421**	**$ 177,447**	**13%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (1,160)**	**$ -**	**$ 0**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: Number of individuals outreached

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	108	108	146,845	1,359.68
Estimated FY14-15	153	153	157,421	1,028.90
Projected FY15-16	102	102	177,447	1,739.68

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**	108	153	102	4. **Geographic Location(s)**			
Male	87	124	82	Durham City			
Female	21	29	26	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	47	67	45	Wake County			
Caucasian	51	74	49	Town of Chapel Hill	83	115	77
Hispanic	4	5	3	Town of Carrboro	23	32	22
Other	6	7	3	Orange County	2	6	3
3. **Age**				Other (specify)			
0-5 Years	0	0	0				
6-18 Years	2	2	1	Per cent of clients at, or below, federal poverty level	100%	100%	100%
19-50 Years	71	101	67				
51+ Years	35	50	34				
Unknown				***TOTAL # OF CLIENTS SERVED***	108	153	102

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: HOUSING FOR NEW HOPE

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 814,672	$ 825,000	$ 866,250	5%
Agency Generated Revenue (fees)	$ 321,161	$ 335,177	$ 338,529	1%
Local Government Grants:				
Orange County	$ 20,000	$ 22,000	$ 22,500	2%
Town of Chapel Hill	$ 5,000	$ 2,500	$ 2,500	0%
Town of Carrboro	$ 3,000	$ 3,300	$ 3,500	6%
Other Local: Cardinal Innovations/PATH	$ 65,167	$ 85,167	$ 87,722	3%
Other Local: CDBG	$ 6,000	$ 6,000	$ 6,500	8%
Other Local: HOME Funds	$ 18,393	$ 33,954	$ 50,000	47%
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government	$ 425,200	$ 431,000	$ 435,310	1%
Federal Government	$ 639,461	$ 614,472	$ 620,617	1%
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 8,498	$ 10,650	$ 10,650	0%
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 2,326,552**	**$ 2,369,220**	**$ 2,444,077**	**3%**
AGENCY EXPENSES				
Compensation	$ 1,145,598	$ 1,249,307	$ 1,274,293	2%
Rent & Utilities	$ 156,247	$ 166,589	$ 171,587	3%
Supplies & Equipment	$ 200,313	$ 240,491	$ 245,301	2%
Travel & Training	$ 78,035	$ 94,545	$ 95,490	1%
Other Expenses:	$ 719,201	$ 618,288	$ 657,407	6%
Please list 3 largest "Other Expenses":				
Client Assistance $ 467,513.00				
Depreciation $ 145,637.00				
Administrative Fees $ 106,051.00				
Total Agency Expenses	**$ 2,299,394**	**$ 2,369,220**	**$ 2,444,078**	**3%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 27,158**	**0**	**(0)**	**0**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Homeless Outreach Case Mgr.	1.0	100%	56,533	57,225	58,942	33%	(R) (H)
Housing / Peer Specialist	1.0	100%	39,795	41,086	42,319	24%	(R) (H)
UNC Psychiatry Resident (Volunteer)	.075	N/A	N/A	N/A	N/A	N/A	N/A

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.

- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Human Rights Center of Chapel Hill and Carrboro**

Street Address: 109 N. Graham Street, Chapel Hill, NC 27

Mailing Address: P.O Box 461 Carrboro, NC 27510

Website Address: http://www.humanrightscities.org

Executive Director: Asif Khan

Telephone: 919-590-5910 E-Mail: hrccarrboro@gmail.com

Contact Person: Asif Khan

Telephone: 919-590-5910 E-Mail: hrccarrboro@gmail.com

Fax: Federal ID Number: 26-3608741

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$1,000	$3,400
Summary of intended use of funds: Assistance in funding bi-weekly English as a Second Language class expenses, including rent, program supplies, and a stipend for the class' coordinator.		
Town of Chapel Hill	$0	$2,775
Summary of intended use of funds: Assistance in funding TECH Empowerment Program coordinator stipend.		
Town of Carrboro	$2,000	$4,725
Summary of intended use of funds: Support for the Afterschool program coordinator's stipend; Assistance in funding Afterschool program's school supplies and space/office rent expenses; Support for housing rights projects, including the Solidarity Network.		

Asif Khan

Executive Director

1/22/2015

Date

Board Chair

1/22/2015

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: September 2008; Granted 501(c)(3) status in February 2009

   b. Years in Operation: 2009-2014

   c. Mission or Vision Statement (if applicable):

      The Chapel Hill-Carrboro Human Rights Center is critically-needed within its community for several reasons, including:

      a) To promote intercultural understanding amongst community members, highlighting the recognition of the dignity and fundamental rights of others across the several traditionally-divisive lines, including race, ethnicity, class, nationality, and religion.
      b) To provide resources for the underserved and impoverished members of the community through skill development and opportunity recognition, while simultaneously providing a platform for meaningful community-based intercultural learning for local college students through their volunteer involvement.

      c) To provide opportunities for college students enrolled in University courses related to experiential learning, human rights, immigration, poverty, and inequality to gain first-hand experiences in an applied setting, thereby relating course content to its real-world application.

      d) To interact meaningfully with other community organizations to combat poverty, racism, exclusive practices, abuse of workers and tenants, sexism, xenophobia, and homophobia in the broader communities of Chapel Hill and Carrboro.

      f) To engage in activities related to the afore-described mission and vision of the organization, provided that the organization shall not engage in any activities or pursue any purposes which are not permitted by a Corporation exempt from United States federal income tax under section 501(c)(3) of the U.S. Internal Revenue Code as the same now exists or as it may hereafter be amended.

   d. Brief History of Agency:

In August of 2008, UNC sociology professor Judith Blau called together a small group of members from the community to plan a Human Rights Week, running from December the 3rd until the 10th. The Human Rights Week was intended to celebrate the celebrate the 60th anniversary of the Universal Declaration of Human Rights and during that week, venues were placed around Chapel Hill and Carrboro to bring awareness to the

celebration, featuring leaders in the community, service and civic organizations, and UNC students in various sociology classes as primary participants.

In the following March of 2009, Dr. Blau purchased Unit E-8 in the Abbey Court Community on Jones Ferry Road, which would then soon become the Human Rights Center. By the fall 2009, the HRC had expanded into a second unit, U-8, and grants allowed for the purchase of supplies to be used by the HRC's students. As time passed, the HRC became well-known throughout the community for its support of immigrant rights and the help it provided to day laborers who were victims of wage theft.

The Center was then forced to relocate from the Abbey Court Community in December of 2011, and was given until the first of the following March to vacate the two purchased units. Fortunately, the HRC found a space in March 2012 at 107 Barnes Street, a location within walking distance of Abbey Court residents. The new location allowed for additional space allotment for computers, as well as the planting of a vegetable garden, and the construction of a chicken coup on the property.

Unfortunately, due to health issues, founder Judith Blau stepped down from her position in December of 2013, necessitating the sale of the Barnes Street property and leading to the temporary closing of the Center on January the 9th, 2014. Under the leadership of Asif Khan, the Center established a mutually-beneficial relationship with local organization El Centro Hispano, thereby allowing it to continue hosting its programs on 201 Weaver Street Location as of January the 27th, 2014. The Human Rights Center now is renting a stable location until a permanent home is found.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

<u>Afterschool Tutoring</u>: The HRC's target population of Latino elementary school students generally lacks resources for academic assistance and enrichment after school. Oftentimes, these students are the only fluent English speakers in their homes, and their live-in relatives frequently have little formal education. To avoid falling further below grade level, these students require the one-on-one tutoring provided by an afterschool program, a service that we have provided since 2009, utilizing work-study students from the Bonner Leaders Program at UNC and additional university volunteers. The program assigns these college students to work individually with the children on homework assignments and supplementary practice on math, reading, and writing-related concepts. In the past, the program has employed two elementary school teachers to aid in student comprehension and program implementation, but has experimented with two student coordinators for the 2014-2015 school year with great success. The program is open to all elementary school students from nearby communities, and also welcomes middle or high school students who need tutoring.

English as a Second Language Classes: The mission of the English as a Second Language classes is to help ease the transition of recent immigrants to the United States through student interaction and an enhanced level of community awareness. It provides an opportunity for Spanish speakers who live in the Chapel Hill and Carrboro area to practice their English. Furthermore, we observe that a new generation of bilingual children is being raised within our immigrant communities, creating a contrast between the children (who speak both English and Spanish) and their parents, who still speak only Spanish. Bilingual children of Spanish-speaking parents often must act as translators for their families, and we would like to empower adults and older members of the community by equipping them with tools that can sustain their language development.

Through conversations with UNC students, community members gain a proficiency in the language that enables them to seek additional employment opportunities, communicate with fellow citizens freely, and take a more active part in the education of their children. Although Spanish-speakers make up the majority of students in the ESL classes, our program includes people from all over the world, including a growing number of Burmese refugees who live in Chapel Hill and Carrboro.

Food Empowerment: Food insecurity is a serious issue for lower income families who live in the 15-501/54 corridor west of Carrboro, the main area that the HRC serves. Many families who attend the food distribution come not only for themselves, but also to collect vegetables for neighbors and friends. Diversity of diets is an issue for the community, as having a low budget makes it much more difficult to access healthy foods, including fruits and vegetables. The children of the communities we most directly impact have proven especially vulnerable to food insecurity, as students of Mary Scroggs Elementary (the elementary school of many of our tutees) reported that in 2012, 33% of the lunches provided were free or reduced in price.

Solidarity Network: Affordable housing is an extremely important and pressing issue in our community. While many government officials, non- profit organizers, and prominent members of the religious community are addressing the issue in earnest, we believe that one voice has been absent in the discussion, that of low-income tenants themselves. Therefore, the Human Rights Center is a principal founder and participant in the Chapel Hill/Carrboro Just Housing Coalition. Our work focused on facilitating the self-organization of lower- income tenants in our community, such that they are empowered to have a voice on issues of housing affordability.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Afterschool Tutoring: No anticipated changes at this time.

English as a Second Language Classes: No anticipated changes at this time.

Food Empowerment: In FY 2014-2015. the HRC did not receive any funds for Food Empowerment. The HRC and Farmer Foodshare worked together to find alternatives. We partnered with the Carrboro Farmers Market and a UNC Healthcare grant to provide market vouchers to our food recipients. These vouchers gave low income residents a discount to attend the market and buy food at reduced prices. The actual food distribution still suffered from a lack of structure and organization due to a lack of tables and supplies. The HRC would like to change operations to better facilitate a self-shop style distribution. This will bring dignity to the program and encourage proud lower income residents who are currently suffering from a lack of healthy produce to participate. Financially we would like to add small stipends for our community volunteers currently sacrificing their time to bring healthy food to their community.

Housing: Given the brief history of our housing initiatives, no major changes are expected to take place.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

Collectively, the programs are beneficiaries of several funding sources. Chapel Hill-Carrboro Youth Forward, a local organization targeting children and youth ages 5-20, awarded the Afterschool Tutoring Program $4,900 in a form of a grant to sustain to grow the Program in scope and amount of children served, including the implementation of "Fun Fridays" as enrichment activities for the youth. Approximately $1,500 remains in the account, allocated various expense categories.

The Food Empowerment, ESL, and Housing initiatives will benefit from a small portion of $5,476 Benefit Day Award from Whole Foods, for use within the programs as the administrators deem fit. The majority of these funds will fund a staff position to create reliable support for all HRC programs.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

Afterschool Tutoring Program:

- **Bonner Leaders Program, UNC**: The program has assigned six work-study award recipients to assist with program coordination and tutoring efforts. The program has supplied a varying amount of students (four to six) since 2011
- **APPLES Service Learning Program, UNC**: The afterschool program has partnered with APPLES to provide UNC students in experiential education courses as tutors for the duration of one semester. Typically, 20-30 such students each contribute 30 hours of their time each semester, a pattern repeated since 2011.
- **Linking Immigrants to New Communities (LINC), UNC**: LINC coordinates English as a Second Language courses (taken by many parents of afterschool students) that directly impact the ability of the parents to assist their children academically.
- **Snak Chef/TABLE:** TABLE is a nonprofit food distribution program in Carrboro that provides the children of the afterschool program with a bag of fresh groceries every week. Also, every other week, a group from TABLE and have a "Snak Chef" program with the kids, in which they bring the supplies and help the kids make a delicious and healthy snack.

English as a Second Language Classes

- **El Centro Hispano:** We are looking forward to forging new relationships with El Centro this semester, as we are temporarily going to be hosting our ESL classes at their center.
- **The University of North Carolina at Chapel Hill:** Most of our volunteers come from UNC-Chapel Hill, as well as many of our past funds and resources.
- **APPLES Program:** Again, many of our volunteers come from the APPLES Program at UNC-Chapel Hill. The APPLES Program consists of service-learning classes that require students to volunteer a certain amount of hours in the community each semester. The many dedicated and competent volunteers we receive are the reason we can offer ESL classes free of charge.
- **Campus Y, the Center for Social Justice at UNC-Chapel Hill:** The Campus Y also provides many of the volunteers, funds, and resources for the ESL classes.
- **LINC (Linking Immigrants to New Communities):** LINC was the organization that originally started the ESL classes in 2009 and is the main driving force behind the classes.

- **Bonner Leaders Program at UNC-Chapel Hill:** The Bonner Leaders Program provides volunteers to work at the center during their four years at UNC. They take on increasing responsibilities each year and become leaders in the community. There are been four Bonner students have worked and are currently working with the ESL classes. They demonstrate dedication and provide stability to the program.

Food Empowerment:

- **Farmer Foodshare**, Saturday Distribution since 2011: The HRC partners with the Farmer Foodshare Donation Station at the Carrboro Farmers Market to source locally grown fresh produce into our community. HRC volunteers arrive before the end of the market and assist Farmer Foodshare volunteers in end of market collection and packing. We then facilitate our own volunteer transportation for the food from market to community distribution.
- **TABLE**, Kid's backpacks since 2011: The HRC partners with TABLE to distribute backpacks of food to our tutoring program.

Solidarity Network:

The Chapel Hill/Carrboro Just Housing Coalition was founded by a consortium of board members of the Human Rights Center, the Weaver Cooperative Housing Association, Mutual Aid Carrboro, and graduate students at UNC working in the area of rights for persons with disabilities. These organizations continue avid participation and support. Together, volunteers from those organizations have knocked on 3000 doors of lower-income housing in Carrboro and Chapel Hill...twice. In addition, we facilitated a public forum for lower-income tenants to communicate, collaborate, and coordinate with one another that was attended by over 60 tenants. We continue to do support work for this community, coordinating with tenant representatives from 9 apartment complexes on their needs and issues. A major focus for us right now are massive and widespread discrepancies in the water bills of low-income tenants, specifically those in complexes owned by the company GSC.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Afterschool Tutoring: As mentioned previously, the target population of the afterschool tutoring program is comprised of primarily Latino elementary school students. Many of their parents speak only Spanish, and the kids therefore cannot seek the help on their English homework that they need. Because most of them are enrolled at Frank Porter Graham Elementary School, a dual-language school, they have an incredible opportunity at hand: to be fluent in two languages. However, it also takes extra effort and work on their part, to do homework in English and in Spanish. The tutoring program provides them the extra help on their English that they do not find at home or in their community.

English as a Second Language Classes: We reach out specifically to the Latino community in the Collins Crossing and Royal Park areas, which has been a fast growing population in recent years. We want to help with their integration into American society by helping them overcome the language barrier. Many of these parents rely on their children to do the translating for them. They are nervous about going to the bank, the doctor, even the grocery store, because they cannot communicate and hold a basic conversation. We do, however, receive people from other parts of the world, so we do not want to exclude them or narrow our focus to only the Latino community in the area. Rather we seek to help anyone who needs English practice. During these classes, not only do we practice conversation, but we also help them fill out job applications or send emails in English.

Food Empowerment: The HRC constantly has a sign posted that food distribution happens every Saturday. We also rely on community volunteers to move the produce from market to the HRC, these members spread news about the distribution by word of mouth as well as take additional produce to families near their homes. Food distribution is one of the HRC's most diverse programs, and we hope to continue this trend by using these established connections to unite lower income individuals with healthy food. We believe it is creating a greater sense of community as people can bring food to share with others. We have had a few successful potlucks during Food Distribution in which members of the community bring food and share in a communal meal together.

Solidarity Network: People of color, immigrants, refugees and the disabled are disproportionately affected by lack of affordable housing in our community. As housing in an internationally recognized human right, the Human Rights Center is committed to supporting those communities most adversely affected. All of our flyering and promotion was done in three languages: English, Spanish, and Karen (a major ethnic group from Burma). Our meetings are translated into all three languages as well.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Afterschool Tutoring

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X			
Health and Nutrition	X			
Job Training				
Sports and Arts Activities	X			
Pre-School Activities				
After-School Activities	X			
Mentoring	X			
Transportation				
Housing				
Other				

English as a Second Language Classes

Category	Youth	Adult	Older Adults	Persons with Disability
Education		X	X	
Health and Nutrition				
Job Training				
Sports and Arts Activities	X			
Pre-School Activities				
After-School Activities				
Mentoring		X		
Transportation				
Housing				
Other				

Food Empowerment

Category	Youth	Adult	Older Adults	Persons with Disability
Education		X		
Health and Nutrition	X	X		X
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other	X	X	X	X

Solidarity Network

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing	X	X	X	X
Other	X	X	X	X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Afterschool Tutoring Program

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Students will receive personalized help in target subject areas.	Teacher feedback through periodical notes written to the students' parents, along with the impressions of their parents regarding areas of weakness were evaluated in structuring a daily program for students to follow.	Each student received a more personalized plan of action during each afterschool tutoring session. Those weak in math were provided with worksheets and flashcards on pertinent subjects; those requiring help in writing were given prompts to work on each day.	Volunteers tracked student completion of math enrichment activities daily, while others tasked with helping with creative writing prompts checked student folders to verify completion.
Student performance on EOG testing will improve in math and reading on a percentile basis.	Students were provided with school-suggested enrichment activities in both worksheet and flash card form to practice relevant skills.	We were unable to acquire student scores on standardized tests due to privacy issues, but observed that each student was promoted to the next grade level, an indicator of success.	Teacher and parent feedback.
Program attendance will increase by 20% in both Spring and Fall 2013 academic semesters	Grassroots efforts in word-of-mouth and flyer dimensions were employed.	Attendance did not improve due to the change in location and loss of some key students to middle school.	Attendance on daily log-in sheets.

If program(s) did not meet its stated goal(s), please explain:

Due to our change in location to El Centro Hispano, the Afterschool Tutoring proved infeasible logistically for many parents, while others elected to enroll in school-sponsored group afterschool tutoring, and others still had their children graduate to middle school.

English as a Second Language Classes

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
100% of adults who attend the ESL classes will see improvement in their English and conversational skills over the course of the 2 semesters.	UNC students and volunteers met with the ESL students and practiced speaking English with them, as well as helping them in other ways, such as filling out applications or sending emails.	Adults involved in the program were appraised informally by our ESL teachers, and each exhibited a substantial improvement in English speaking proficiency.	Personal observation of the ESL teachers and surveys given to the participants to gage their opinions on the quality and efficiency of the classes and volunteers
100% retention rate of the ESL students.	ESL students developed a relationship with their personal tutors. Thus, a system of accountability and trust is ensured their continued attendance throughout the duration of the semesters.	From the impressions of the volunteers that ran the ESL program, each student was retained throughout the duration of the 2013-2014 span of the grant.	Participant contact information is recorded during the sign-in process at the beginning of class, as well as attendance marks.
At least a 25% growth rate over the course of the semester	Volunteers advertised to different communities about the free ESL classes being offered, thus drawing in more people from the community. Word-of-mouth communication by participants as also evident.	Although the numbers fluctuated on a weekly basis, in general, word-of-mouth communication by participants contributed to a satisfactory influx of students.	We kept our list of participants updated, and recorded when new people attended ESL courses. First time students received information to become well-informed about program offerings.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

Food Empowerment

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Increase access to healthy local produce from an initial 10 families to 20 disadvantaged families from the Carrboro	Saturday food distribution and community gathering.	100% of the goal was achieved (and exceeded) as we had regular 20-25 families attending our distribution every Saturday.	Farmer Foodshare-collected data on client satisfaction with distribution methods.
20 families will learn how to cook/prepare new types of vegetables from the market	Establish strategic partnership with Farmer Foodshare to hold bimonthly cooking demonstrations through their food ambassador program.	17 families (85%) learned how to cook and prepare new types of vegetables	Number of attendees to the organized gatherings.
Partner with TABLE to provide Backpacks to 20 community children	Backpack Distribution to afterschool participants Thursdays. Snack Chef Program every other Tuesday.	Snack Chef met with Afterschool participants on a weekly basis, disseminating valuable nutritional information to students. 15 students received backpacks weekly	Student and parent feedback.

If program(s) did not meet its stated goal(s), please explain:

Student attendance proved lower than expected, but that discrepancy is explained in full in the Afterschool Tutoring section. This influenced lower backpack distributions than expected. With improvements in afterschool attendance we hope to reach our 2015 goals.

Solidarity Network

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
To create a community of individuals dedicated to uplifting human rights and resisting exploitation and discrimination in housing	We utilized both social media and traditional communication to alert the community about issues they should be aware of. Individuals who join the network agree to join in future activities.	As a new program, we have been able to create a steady community of individuals to help uplift and support each other in situations such as wage theft and housing discrimination.	1. Number of resolved discrepancies. 2. Verification of successful distribution.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Afterschool Tutoring

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Grow Afterschool tutoring program attendance in the Spring of 2015 in the new El Centro Hispano location by 15%.	We will recruit additional students within the community through the use of flyers and word of mouth by students who can vouch for the stability and effectiveness of the program.	We anticipate growth in the program because of our new, stable location and the community outreach achieved through grassroots marketing and word of mouth.	Daily log-in sheets will be used to track attendance.
Each student will receive personalized tutoring attention in target areas	Tutors will monitor student progress in different subjects and synthesize those opinions with teacher feedback to focus on additional worksheets and activities that will be the most beneficial	We expect each student to receive this personalized instruction by virtue of our trained tutors and availability of enrichment activities at El Centro Hispano	The folders that hold the work of each student will be evaluated to surmise what the subject of focus was and if improvement was made on report cards.
At least 90% of our students will be promoted successfully to the next grade level.	With our homework help and personalized tutoring, we hope to assist each student in being promoted to the next grade level	We anticipate that the vast majority of our students will receive satisfactory grades on EOG testing evaluations, and thereby be promoted	Correspondence with teachers and parents as to the progress of the student.

English as a Second Language Classes

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Maintain and increase student enrollment in the ESL Program	Tutors tend to work with the same students for the duration of the program. This permits both students and tutors to form relationships. The students, who feel comfortable with their tutors, stay in the program and a high retention rate is reached.	We anticipate forging new relationships with students in the community through word of mouth, thereby increasing attendance to eight students as the notoriety of the tutors and the program's quality.	Program enrollment will be documented through log-in sheets.
Increase the participants' English language proficiency	Tutors and students utilize worksheets and one-on-one conversation to increase the students' level of English proficiency.	We anticipate that our pedagogical methods of active learning will improve the English language proficiency of each student throughout the semester to 80%.	The tutors in charge will evaluate the fluency of the students' conversations.
Increase the ease of integration into social and professional environment	Tutors and students work together on issues that the students discuss. Tutors help students with resume building, practice for the citizenship test and more, in order to ease their transition into the social and professional world.	We anticipate that the students who sense an increased ease of transition into the social and professional world will increase to 70%.	The tutors will speak with students and evaluate whether there has been a change in the perceived ease in their social and professional lives due to their grasp of English.

Food Empowerment

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Increase access to healthy local produce from an initial 20 families to 25	Saturday food distribution and community gathering.	We expect that a growth rate of 25% is attainable for healthy local produce distribution in the new year.	Farmer Foodshare-collected data on client satisfaction with distribution methods.
Partner with TABLE to provide Backpacks to 20 community children	Establish strategic partnership with Farmer Foodshare to hold bi-monthly cooking demonstrations through their food ambassador program.	Given our synergistic efforts with the Afterschool tutoring students' families, we believe that 20 children can receive backpacks given our notoriety in the community.	HRC Afterschool tutors will count the number of bags given to children.
Establish weekly gatherings of at least 15 families from various ethnicities, centered around sharing food.	Backpack Distribution to afterschool participants on Thursdays. Snack Chef Program every other Tuesday.	We hope to establish weekly gatherings that will eventually culminate in 15 families meeting, starting with the less ambitious goal of only a few for the first few weeks.	Student and parent feedback.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Involve community members from Chapel Hill and Carrboro.	Organize groups of interested community members in more than one geographical area in hopes of acquiring a more diverse view.	We anticipate that given the newness of the program, its growth in recognition amongst community members.	Track attendance by also including home address as a metric.
Collaborate with El Centro Hispano to create a relationship between organizations to combat wage theft.	We anticipate meeting with the El Centro executive board to create dialogue regarding how we can help optimize their new workers center.	We would like to meet on a monthly basis with El Centro Hispano, and connect at least 10 employees with their wage theft division.	Tracking attendance and counting how many of our community members have explored dealing with wage theft at El Centro.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Human Rights Center - Solidarity Network**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 250	$ 100	$ 250	150%
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ -	$ -	$ -	0
Town of Chapel Hill	$ -	$ -	$ 1,150	0
Town of Carrboro	$ -	$ 300	$ 1,150	283%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -	$ -	$ -	0
State Government	$ -	$ -	$ -	0
Federal Government	$ -	$ -	$ -	0
Other Grants: Federal Work Study (UNC)	$ -	$ -	$ 2,700	0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 250**	**$ 400**	**$ 5,250**	**1213%**
PROGRAM EXPENSES				
Compensation	$ -	$ -	$ 4,500	0
Rent & Utilities	$ -	$ -	$ -	0
Supplies & Equipment	$ -	$ 300	$ 400	33%
Travel & Training	$ -	$ 100	$ 150	50%
Other Expenses:	$ -	$ -	$ 500	0
Please list 3 largest "Other Expenses":				
Liability Insurance $ 500.00				
$ -				
$ -				
Total Program Expenses	**$ -**	**$ 400**	**$ 5,550**	**1288%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 250**	**$ -**	**$ (300)**	**0**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Human Rights Center - Afterschool Tutoring Program**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 750	$ 700	$ 1,000	43%
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ -	$ -	$ -	0
Town of Chapel Hill	$ -	$ -	$ -	0
Town of Carrboro	$ -	$ -	$ 2,450	0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -	$ -	$ -	0
State Government	$ -	$ -	$ -	0
Federal Government	$ -	$ -	$ -	0
Other Grants: Chapel Hill Youth Forward	$ 3,061	$ -	$ -	0
Other Grants: Federal Work Study		$ 3,600	$ 4,000	11%
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 3,811**	**$ 4,300**	**$ 7,450**	**73%**
PROGRAM EXPENSES				
Compensation	$ 7,000	$ 3,600	$ 5,800	61%
Rent & Utilities	$ 200	$ 400	$ 800	100%
Supplies & Equipment	$ 500	$ 100	$ 150	50%
Travel & Training	$ 270	$ 200	$ 200	0%
Other Expenses:	$ -	$ -	$ 500	0
Please list 3 largest "Other Expenses":				
Liability Insurance $ 500.00				
$ -				
$ -				
Total Program Expenses	**$ 7,970**	**$ 4,300**	**$ 7,450**	**73%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (4,159)**	**$ -**	**$ -**	**0**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Human Rights Center - English as a Second Language Classes**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 500	$ -	$ -	0
Program Generated Revenue (fees)	$ -	$ -	$ -	0
Local Government Grants:				
Orange County	$ -	$ 1,000	$ 3,400	240%
Town of Chapel Hill	$ -	$ -		0
Town of Carrboro	$ -	$ -		0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Federal Work Study (UNC)	$ -	$ 1,350	$ 1,350	0%
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 500**	**$ 2,350**	**$ 4,750**	**102%**
PROGRAM EXPENSES				
Compensation	$ -	$ 1,350	$ 3,150	133%
Rent & Utilities	$ 500	$ 450	$ 500	11%
Supplies & Equipment	$ 210	$ 500	$ 500	0%
Travel & Training	$ 100	$ 100	$ 100	0%
Other Expenses:	$ -	$ -	$ 500	0
Please list 3 largest "Other Expenses":				
Liability Insurance $ 500.00				
$ -				
$ -				
Total Program Expenses	**$ 810**	**$ 2,400**	**$ 4,750**	**98%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (310)**	**$ (50)**	**$ -**	**100%**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Human Rights Center - Food Empowerment**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 400	$ 50	$ -	-100%
Program Generated Revenue (fees)	$ -	$ -	$ -	0
Local Government Grants:				
Orange County	$ -	$ -		0
Town of Chapel Hill	$ -	$ -	$ 1,375	0
Town of Carrboro	$ -	$ -	$ 1,375	0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Federal Work Study	$ -	$ 700	$ 900	29%
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 400**	**$ 750**	**$ 3,650**	**387%**
PROGRAM EXPENSES				
Compensation	$ -	$ 700	$ 2,700	286%
Rent & Utilities	$ 100	$ -	$ -	0
Supplies & Equipment	$ 400	$ -	$ 250	0
Travel & Training	$ 100	$ 200	$ 200	0%
Other Expenses:	$ -	$ -	$ 500	0
Please list 3 largest "Other Expenses":				
Liability Insurance $ 500.00				
$ -				
$ -				
Total Program Expenses	**$ 600**	**$ 900**	**$ 3,650**	**306%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (200)**	**$ (150)**	**$ -**	**100%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

Afterschool Tutoring Program

1) **Define one unit of service**[+]: An hour of one-on-one tutoring between an elementary school child and a tutor

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	Approx. 3,500	3,500	$7,970	$2.28
Estimated FY14-15	4,000	4,000	$4,300	$1.08
Projected FY15-16	4,000	4,000	$7,450	$1.86

English as a Second Language Classes

2) **Define one unit of service**[+]: One adult fully completing one semester of ESL.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	14	14	$810	$57.86
Estimated FY14-15	11	11	$2,400	$218.19
Projected FY15-16	14	14	$4,750	$339.29

Food Empowerment

3) Define one unit of service[+]: One family supplied fresh produce for one week.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	25	25	$600	$24
Estimated FY14-15	35	35	$900	$25.71
Projected FY15-16	40	40	$3,650	$91.25

Solidarity Network

4) Define one unit of service[+]: One low-income tenant informed of their rights regarding housing.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	300	300	$0	$0
Estimated FY14-15	4000	4000	$400	$0.10
Projected FY15-16	4900	4900	$5,550	$1.13

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Afterschool Tutoring

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	22	18	20	Durham City			
Female	26	22	26	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	2	5	6	Wake County			
Caucasian	0	0	0	Town of Chapel Hill	2	1	6
Hispanic	32	25	24	Town of Carrboro	46	39	40
Other	14	15	16	Orange County			
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years	48	40	46	Per cent of clients at, or below, federal poverty level	50	50	50
19-50 Years							
51+ Years							
Unknown				***TOTAL # OF CLIENTS SERVED***	48	40	46

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: English as a Second Language Classes

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	10	6	8	Durham City			
Female	4	5	6	Durham County			
2. **Ethnicity**				Raleigh City			
African-American				Wake County			
Caucasian				Town of Chapel Hill	2	3	4
Hispanic	12	11	12	Town of Carrboro	2	0	0
Other	2	0	2	Orange County	2	0	0
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years				Per cent of clients at, or below, federal poverty level	80	80	80
19-50 Years	11	11	12				
51+ Years	3	0	2				
Unknown				***TOTAL # OF CLIENTS SERVED***	14	11	14

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Food Empowerment (including Backpack program and Food Distribution participants)

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	14	17	20	Durham City			
Female	22	28	33	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	7	7	7	Wake County			
Caucasian	2	4	5	Town of Chapel Hill	6	8	10
Hispanic	22	28	24	Town of Carrboro	30	37	43
Other	5	6	7	Orange County			
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years	18	22	24	Per cent of clients at, or below, federal poverty level	80	80	80
19-50 Years	15	19	25				
51+ Years	3	4	4		36		
Unknown				***TOTAL # OF CLIENTS SERVED***		45	53

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Solidarity Network

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	180	1775	2460	Durham City			
Female	220	1725	2440	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	110	750	1350	Wake County			
Caucasian	140	700	950	Town of Chapel Hill			400
Hispanic	150	850	1500	Town of Carrboro	400	3000	4500
Other	100	700	1200	Orange County			
3. **Age**				Other (specify)			
0-5 Years	0	0	0				
6-18 Years	0	50	150	Per cent of clients at, or below, federal poverty level	0	0	0
19-50 Years	305	2500	3750				
51+ Years	195	450	600		400		
Unknown				***TOTAL # OF CLIENTS SERVED***		3000	4900

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Human Rights Center of Chapel Hill and Carrboro**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 1,900	$ 1,000	$ 1,200	20%
Agency Generated Revenue (fees)	$ -	$ -	$ -	0
Local Government Grants:				
Orange County	$ -	$ 1,000	$ 3,400	240%
Town of Chapel Hill	$ -	$ -	$ 2,775	0
Town of Carrboro	$ -	$ 2,000	$ 4,725	136%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -	$ -	$ -	0
State Government	$ -	$ -	$ -	0
Federal Government	$ -	$ -	$ -	0
Other Grants: Chapel Hill Youth Forward	$ 3,061	$ -	$ -	0
Other Grants: Federal Work Study (UNC)	$ -	$ 5,650	$ 8,950	58%
Miscellaneous/Other Revenue		$ 6,175	$ 1,500	-76%
Please list 3 largest Miscellanous sources:				
Whole Foods Benefit Day $ 5,475.00				
Church Fundraising $ 700.00				
Tar Heel 10-Miler $ 800.00				
Total Agency Revenue	**$ 4,961**	**$ 15,825**	**$ 22,550**	**42%**
AGENCY EXPENSES				
Compensation		$ 12,850	$ 16,150	26%
Rent & Utilities	$ 700	$ 900	$ 1,300	44%
Supplies & Equipment	$ 1,100	$ 900	$ 1,450	61%
Travel & Training	$ 470	$ 650	$ 700	8%
Other Expenses:	$ -	$ 1,200	$ 2,000	67%
Please list 3 largest "Other Expenses":				
Liability Insurance $ 2,700.00				
$ -				
$ -				
Total Agency Expenses	**$ 2,270**	**$ 16,500**	**$ 21,600**	**31%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 2,691**	**$ (675)**	**$ 950**	**241%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Volunteer Coordinator	1	100% (all)	$6,050 (AmeriCorps)	$6,050 (AmeriCorps)	$7,200 (AmeriCorps)	33.3%	
Food Programs Coordinator	0.5	100%	$250	$250	$500	2.3%	
Assistant Director	0.5	100% (all)	Volunteer	Volunteer	Volunteer	0%	
6 Bonner Leader Students (Afterschool/Fun Friday Program Coordinators)	0.25 (each)	75%	$1,091 each, paid by UNC	$1,375 each, paid by UNC	$1,408 each, paid by UNC	19.55%	
2 Work Study Students	0.25 (each)	20%	DNE	$1,375 each, paid by UNC	$1,375 each, paid by UNC	19.55%	
Volunteers	1.64	100%	Volunteer	Volunteer	Volunteer	0%	

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Inter-Faith Council for Social Service

Street Address: 110 W. Main Street Carrboro, NC 27510

Mailing Address: 110 W. Main Street Carrboro, NC 27510

Website Address: www.ifcweb.org

Executive Director: John W. Dorward

Telephone: 919-929-6380 x 14 E-Mail: jdorward@ifcmailbox.org

Contact Person: Elizabeth Garfunkel

Telephone: 919-929-6380 x 15 E-Mail: egarfunkel@ifcmailbox.org

Fax: 919-869-1886 Federal ID Number: 59-1224041

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$41,000	$48,449
Summary of intended use of funds: To renew Orange County's funding of IFC food and shelter programs serving our neighbors in need, and also to help fund half of the salary costs of a half-time staff person to coordinate the Orange County Partnership to End Homelessness (OCPEH) support circles program the IFC agreed to staff. We are looking for the other half from private funders. This extra money is being pro-rated among all three units of government who fund the IFC through Outside Agency funding.		
Town of Chapel Hill	$18,000	$21,283
Summary of intended use of funds: To renew Chapel Hill's funding of IFC food and shelter programs serving our neighbors in need, and also to help fund half of the salary of a half-time staff person to coordinate the Orange County Partnership to End Homelessness (OCPEH) support circles program the IFC agreed to staff. We are looking for the other half from private funders. This extra money is being pro-rated among all three units of government who fund the IFC through Outside Agency funding.		
Town of Carrboro	$10,000	$11,894
Summary of intended use of funds: To renew Carrboro's funding of IFC food and shelter programs serving our neighbors in need, and also to help fund half of the salary of a half-time staff person to coordinate the Orange County Partnership to End Homelessness (OCPEH) support circles program the IFC agreed to staff. We are looking for the other half from private funders. This extra money is being pro-rated among all three units of government who fund the IFC through Outside Agency funding.		

John W. Dorward, Executive Director

1/21/15
Date

Mary Beth Koza, Board Chair

1-21-15
Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 1966

   b. Years in Operation: 51

   c. Mission or Vision Statement (if applicable): The Inter-Faith Council for Social Service meets basic needs and helps individuals and families achieve their goals. We provide shelter, food, direct services, referrals and information to people in need. We accomplish this through strong partnerships with volunteers, staff and those we serve. We rely on the active involvement of caring individuals, congregations and other community organizations.

   d. Brief History of Agency: The Inter-Faith Council for Social Service (IFC) was founded in 1963 to address the significant gaps that existed in the social safety net of our community. Today, the IFC is the principal agency in Orange County for mobilizing our community to address homelessness, hunger and economic disparity.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

<u>Program 1, Food Programs</u>

According to the latest data available from Feeding America, Orange County had an overall food insecurity rate of 15.6 percent and 20,900 food insecure people. In the Chapel Hill-Carrboro City Schools, 60% of preschool children, 30% of elementary school children and 24% of middle school students receive free and reduced price meals. We currently have over 4,000 households who are card carrying members of the food pantry and are eligible to come in for groceries once a month. We believe that between our pantry, community kitchen and holiday meals program the IFC helps to feed more people in Orange County, Chapel Hill and Carrboro than any other agency in the County.

<u>Program 2, Residential Programs</u>

The Point-in-Time Count on January 29, 2014 found 108 homeless individuals in Orange County and almost all of them were staying at one of our two shelters. Because of the weather that evening, no counts were made outside of our shelters. Had the count included those sleeping outdoors and in abandoned houses, etc. the result would have been higher. The IFC provided shelter services to 373 men, 202 women and 83 children last year (unduplicated individuals). Our shelters sleep some 50 people per night at each facility and we have had

waiting lists at both shelters for quite some time. That includes the entire summer of 2014, which is the first time we can remember that happening.

Program 3, Support Circles

Research shows that as homeless individuals and families transition out of shelters and other emergency housing into more independent living in the community, having support services is an essential component of successful stabilization. A much higher percentage of those who receive wrap-around services remain housed on a more permanent basis.
In collaboration with social service agencies, the Support Circles Program contributes to breaking the cycle of poverty and homelessness in Orange County by training and supporting community members (volunteers) to provide material, practical, financial and relational support to those who are transitioning.

Each individual or family (called a Partner) is matched with a Support Circle for 12 months. Modeled in large part after the Raleigh / Wake Support Circles Program for Homeless Families (www.catholiccharitiesraleigh.org/causes/support-circles), OCPEH Support Circles provides volunteers essential training to be able to foster relationships that are empowering and offer support with the end goal of enhancing the likelihood that the Partners will be able to sustain the positive changes in their lives, both on an individual level (addressing domestic violence, mental illness and addiction issues) and in facing the structural and systemic challenges that contributed to their homelessness (such as lack of affordable housing, poverty and lack of affordable health care).

All of the households served so far this year by the OCPEH Support Circles program have remained in independent living. This program, now in its third year, has grown large enough that an all-volunteer effort is no longer practical. Their success is encouraging other volunteers to come forward and want to form circles, but there is a great deal of training and coordinating that must happen in order to increase the number of circles going at the same time. The need is for a part-time staff position.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Program 1, Food Programs

You have probably heard that the IFC is building a new Community House homeless shelter for men out on MLK, Jr. Blvd. While the community kitchen has been co-located with the men's shelter for a number of years now, they will be separated when the new shelter opens. These two programs have operated out of the old municipal building in Chapel Hill for over 20 years. The Town has made it clear for the last few years that they would like to get their building back, which is a very reasonable request. We would like to combine all of our hunger relief programs into one location called FoodFirst. Toward that end, we are in active discussions with the Town of Carrboro to see if it will be possible for us to combine the food pantry and the community kitchen into our present location in the Douglas Building in Carrboro. If this approval is ultimately given, the plan would be to raise money for a replacement building on that site.

Program 2, Residential Programs

We anticipate that the new IFC @ SECU Community House will be ready to open its doors in late August of 2015. While this new facility will be primarily transitional, we will still offer emergency services during inclement weather conditions. Inclement weather means low temperatures below 40 degrees, ice, snow, hurricanes, tornados, etc. During these situations we can take in an additional 17 men per night. That means a maximum of 69 men on any given night.

Program 3, Support Circles

In September, the IFC Board of Directors voted to accept the coordination role for the Support Circles program in Orange County. Support Circles are groups of 8-10 people who support formerly homeless or those at risk of homelessness who are transitioning back into permanent housing and independent living. These groups started in Orange County three years ago and there are currently five active circles. The Orange County Partnership to End Homelessness and the Support Circles program volunteers requested that IFC consider taking on the coordination of the Support Circles, which have become too large and too successful for volunteers to manage alone. One IFC staff person is coordinating Support Circles half time and we are seeking funding for half of that cost from these bodies. We are seeking the remaining half from private sources.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

Program 1, Food Programs

For Fiscal Year 2015-2016, the agency anticipates program revenue sources of $383,168 in cash contributions. Of this amount, private sources are about 47%; program-generated revenue - 16%; local governments – 4%; non-local governments - 30%; other sources - 3%.

Program 2, Residential Programs

For Fiscal Year 2015-2016, the agency anticipates program revenue sources of $994,332 in cash contributions. Of this amount, private sources are about 62%; local governments – 4%; non-local governments - 33%; other sources - 1%.

Program 3, Support Circles

For Fiscal Year 2015-2016, the agency anticipates program revenue sources of $34,808 in cash contributions. Of this amount, private sources are about 60%; local governments – 36%; non-local governments - 4%.

IFC also anticipates in-kind donations of food, services, volunteer hours, etc. valued at about $2,443,000. All revenue sources indicated are expected to be ongoing, but are not multi-year.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- Active participation on Orange County's Family Success Alliance leadership council. The Alliance seeks to improve the lives and opportunities for long term success for children and families struggling to make ends meet. This is done through developing a "pipeline" of coordinated community resources that will ensure the successful passage of children from cradle to career or college;

- IFC works closely with Farmer Foodshare, TABLE, St. Joseph's Food Ministry, Inter-Faith Food Shuttle, Food Bank of Central and Eastern North Carolina, local grocery stores, restaurants, congregations, UNC at CH dining services and other food programs to gather and distribute the needed food resources;

- In an effort to help keep people in independent housing and have the money to buy groceries on their own, we have been partnering for the last year with the Jackson Center. We received a special grant from Duke Energy that allows us to pay for replacing electrical appliances that no longer work or are no longer efficient. Working with the Jackson Center we have replaced many different appliances and HVAC systems for residents of the Northside and Rogers Road Communities. Many of these homeowners/families have been residents of these neighborhoods for generations, but the homes they live in are in need of repairs to provide basics like heat. We also worked with several families in the Rocky Brook trailer park in Carrboro after the flooding in the same way.

- Participation on the Orange County Partnership To End Homelessness executive council and the Support Circles Program;

- Collaboration with liaisons representing some 35 congregations who meet regularly for IFC updates, trainings, sharing of information, organizing food collections and mobilizing volunteers and financial resources;

- The IFC recruits and maintains cooking groups from congregations, neighborhoods, the university and businesses to prepare and serve meals at the Community Kitchen, at HomeStart and soon at the new Community House;

- We rely heavily on in-kind donations from local businesses and community volunteers ($941,398 worth of food and 40,197 volunteer hours last year alone).

- Partnership with the Town of Chapel Hill providing a no-cost lease at the Old Municipal Building where the Community House men's shelter and the Community Kitchen currently reside;

- Partnership with Orange County that provides a no-cost 25-year lease of three acres of land where the IFC's HomeStart facility sits. We also collaborate with the County on the Emergency Solutions Grant and rapid rehousing;

- 50-year lease arrangement with the University of North Carolina at Chapel Hill for the IFC @ SECU Community House transitional housing facility for homeless men in partnership with the Town of Chapel Hill and numerous social service agencies;

- Partnership with UNC Hospitals, Piedmont Health Services (PHS), SHAC Clinic and a multitude of community health professionals who volunteer cooperatively at the Robert Nixon Free Clinic for the Homeless to offer primary health and mental health, dental work and dentures, prescriptions and referrals to homeless residents;

- Our partnership with Piedmont Health Services will expand upon completion of the IFC @ SECU Community House. Once completed, the medical, mental health and dental clinics will become a satellite clinic of PHS, which will greatly enhance the number of services offered on site and will have a huge impact on our long-term sustainability of health care for all of our residents;

- Ongoing collaboration with Housing for New Hope PATH workers who offer outreach services to homeless persons who are street persons or unsheltered;

- The Literacy Council and UNC students' Talking Sidewalks and Home and Homeless Project provide cultural, educational, writing and literacy programs to both male and female shelter residents;

- IFC works closely with the Community Empowerment Fund who offer financial education, matching funds savings accounts and job search help to many of our residents and Support Circle participants;

- IFC works with the Veterans Administration to assist our homeless vets with services;

- Longstanding collaborative relationships between Freedom House, The Horizons Program at UNC-CH and AA/NA groups to respond to addiction and substance abuse issues experienced by clients;

- Partnership with the Compass Center who provide domestic violence workshops geared toward both women and children at HomeStart. We also work closely with the Center to provide a safe space for survivors to be housed, when appropriate;

- Partnership with The Furniture Project, organized by St. Thomas More volunteers and supported by the IFC since its inception, which helps furnish homes for graduates of IFC residential services and others throughout the community who might not otherwise have furniture;

- Partnership with the PTA Thrift Shop, which provides clothing vouchers for IFC clients. This long-standing partnership is a huge help to our many clients who find themselves in need of clothing.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

IFC has a non-discrimination policy so anyone can receive services regardless of race, ethnicity, class or poverty-related conditions. We offer services to those who are undocumented if they are

in need and meet our other requirements. All IFC food, crisis intervention, medical/mental health and residential programs have a large representation of ethnic and minority groups, who were hardest hit by the economic downturn (please refer to the demographic section of our application). The IFC actively recruits minority, homeless and formerly homeless candidates for the Board of Directors, committees and employment/vendor/volunteer positions. We actively recruit Spanish speakers as staff and volunteers. We would also refer you to our partner listing for a better idea of how we reach these communities.

Furthermore, we have provided special trainings for staff, Board members and volunteers to raise awareness about discrimination. All staff were certified on Mental Health First Aid at a training provided by Cardinal Innovations. Staff received training on transgender issues provided by the LGBT Center of Raleigh. IFC's Personnel Committee has compiled a resource list for future staff trainings that will be provided as time allows.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition *(Food Programs)*	X	X	X	X
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring *(Support Circles)*	X	X	X	X
Transportation				
Housing *(Residential Program)*	X	X	X	X
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Program 1, Food Programs

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
The Food Pantry will collect or purchase enough non-perishable food items to provide groceries as often as once per month to member households	Staff and volunteers of the Food Pantry will distribute monthly grocery allotments of essential food items to over 4,700 eligible members; quantities are based on the number of people in the household	16,828 bags of groceries and 876 holiday meals distributed	Community Services Director and Client Services Representatives track number of bags of groceries and holiday meals distributed
A hot, nutritious meal will be served to homeless residents and any hungry person who shows up at mealtimes at the Community Kitchen	IFC's Kitchen Coordinator and 500+ community volunteers will serve 80,000 hot, nutritious meals during the program year	84,645 hot, nutritious meals were served at the Community Kitchen and HomeStart	Kitchen Coordinator determines number of meals served by counting trays at the end of each meal service

Program 2, Residential Programs

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Both Community House and HomeStart will operate at capacity (all available beds will be filled)	Some 500 homeless persons who lack a fixed, regular, and adequate nighttime residence will receive emergency/transitional shelter during the program year	Community House provided 17,196 bednights for 373 men and HomeStart provided 13,424 bednights to 202 women and 83 children	Information logged into the Carolina Homeless Information Network (CHIN) and an in-house data collection system

Program 3, Support Circles

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Support Circles will function as a support system for a formerly homeless individual or family transitioning into permanent housing	Support Circles comprised of 8-10 volunteers will function as a support system for their partners, i.e. helping them work out budgets, sharing information, providing furniture and household items, helping partners fill out and submit job applications, providing transportation, tutoring, thus empowering their partner to remain independent and securely housed	There were five circles functioning and all households were successful and remained in their homes	Support Circle Coordinator will collect data on demographics, assistance rendered and final outcomes

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Program 1, Food Programs

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
The Food Pantry will collect enough non-perishable food items to provide groceries as often as once per month to member households	16,000 bags of groceries and 700 holiday meals will be distributed during the program year	16,000 bags of groceries and 700 holiday meals will be distributed	Community Services Director and Client Services Representatives track number of bags of groceries and holiday meals distributed
A hot, nutritious meal will be served to any hungry person who shows up at mealtimes at the Community Kitchen	IFC's Kitchen Coordinator and 500+ community volunteers will serve 80,000 hot, nutritious meals during the program year	80,000 hot, nutritious meals will be served at the Community Kitchen, HomeStart and Community House	Kitchen Coordinator determines number of meals served by counting trays at the end of each meal service at each location

Program 2, Residential Programs

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Both Community House and HomeStart will operate at capacity (all available beds will be filled)	Some 500 homeless persons who lack a fixed, regular, and adequate nighttime residence will receive emergency/transitional shelter during the program year	Community House will provide 16,000 bednights and HomeStart will provide 14,000 bednights to women and children	Information logged into the Carolina Homeless Information Network (CHIN) and an in-house data collection system

Program 3, Support Circles

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Support Circles will function as a support system for a formerly homeless individual or family transitioning into permanent housing	Support Circles comprised of 8-10 volunteers will function as a support system for their partners, i.e. helping them work out budgets, sharing information, providing furniture and household items, helping partners fill out and submit job applications, providing transportation, tutoring, thus empowering their partner to remain independent and securely housed	We plan to double the number of active circles from 5 to 10 this year	Support Circle Coordinator will collect data on demographics, assistance rendered and final outcomes

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Inter-Faith Council for Social Service - Emergency Pantry**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 104,052	$ 59,749	$ 55,645	-7%
Program Generated Revenue (fees)	$ 34,304	$ 36,500	$ 36,500	0%
Local Government Grants:				
Orange County	$ 4,879	$ 3,567	$ 3,567	0%
Town of Chapel Hill	$ 2,142	$ 1,566	$ 1,566	0%
Town of Carrboro	$ 1,190	$ 870	$ 870	0%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 18,153	$ 16,504	$ 16,504	0%
State Government				0
Federal Government				0
Other Grants: Foundations	$ 56,898	$ 36,579	$ 36,119	-1%
Other Grants:				0
Miscellaneous/Other Revenue	$ 10,000	$ 10,000	$ 10,000	0%
Please list 3 largest Miscellanous sources:				
Smith/Monk Fund $ -				
$ -				
$ -				
Total Program Revenue	**$ 231,618**	**$ 165,335**	**$ 160,771**	**-3%**
PROGRAM EXPENSES				
Compensation	$ 93,162	$ 90,405	$ 87,122	-4%
Rent & Utilities	$ 4,895	$ 4,861	$ 4,861	0%
Supplies & Equipment	$ 58,748	$ 32,918	$ 32,918	0%
Travel & Training				0
Other Expenses:	$ 74,813	$ 37,151	$ 35,870	-3%
Please list 3 largest "Other Expenses":				
Allocation of agency overhead $ -				
$ -				
$ -				
Total Program Expenses	**$ 231,618**	**$ 165,335**	**$ 160,771**	**-3%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Inter-Faith Council for Social Service - Community Kitchen**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 110,852	$ 123,463	$ 123,463	0%
Program Generated Revenue (fees)	$ 22,423	$ 25,000	$ 25,000	0%
Local Government Grants:				
Orange County	$ 4,510	$ 5,507	$ 5,507	0%
Town of Chapel Hill	$ 1,980	$ 2,286	$ 2,286	0%
Town of Carrboro	$ 1,100	$ 1,270	$ 1,270	0%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 20,422	$ 22,168	$ 22,168	0%
State Government				0
Federal Government				0
Other Grants: Foundations	$ 53,351	$ 42,703	$ 42,703	0%
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 214,638**	**$ 222,397**	**$ 222,397**	**0%**
PROGRAM EXPENSES				
Compensation	$ 99,653	$ 126,134	$ 126,134	0%
Rent & Utilities	$ 17,738	$ 20,392	$ 20,392	0%
Supplies & Equipment	$ 28,093	$ 21,638	$ 21,638	0%
Travel & Training	$ -	$ -	$ -	0
Other Expenses:	$ 69,154	$ 54,233	$ 54,233	0%
Please list 3 largest "Other Expenses":				
Allocation of agency overhead $ -				
$ -				
$ -				
Total Program Expenses	**$ 214,638**	**$ 222,397**	**$ 222,397**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Inter-Faith Council for Social Service - Community House**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 217,943	$ 242,771	$ 242,771	0%
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 10,742	$ 12,915	$ 12,915	0%
Town of Chapel Hill	$ 4,716	$ 5,670	$ 5,670	0%
Town of Carrboro	$ 2,620	$ 3,150	$ 3,150	0%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 29,256	$ 34,020	$ 34,020	0%
State Government	$ 14,612	$ 29,808	$ 29,808	0%
Federal Government				0
Other Grants: Foundations	$ 219,254	$ 143,227	$ 143,227	0%
Other Grants:				0
Miscellaneous/Other Revenue	$ 11,500	$ 80,000	$ 80,000	0%
Please list 3 largest Miscellanous sources:				
UNC Men's Basketball $ -				
NCAFC $ -				
Transfer from Capital Fund $ -				
Total Program Revenue	**$ 510,643**	**$ 551,561**	**$ 551,561**	**0%**
PROGRAM EXPENSES				
Compensation	$ 298,957	$ 378,400	$ 378,400	0%
Rent & Utilities	$ 15,205	$ 13,419	$ 13,419	0%
Supplies & Equipment	$ 20,445	$ 13,863	$ 13,863	0%
Travel & Training	$ -	$ 125	$ 125	0%
Other Expenses:	$ 176,036	$ 145,754	$ 145,754	0%
Please list 3 largest "Other Expenses":				
Allocation of agency overhead $ -				
Professional fees & assistance $ -				
$ -				
Total Program Expenses	**$ 510,643**	**$ 551,561**	**$ 551,561**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Inter-Faith Council for Social Service - HomeStart**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 322,867	$ 293,872	$ 293,872	0%
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 11,029	$ 10,373	$ 10,373	0%
Town of Chapel Hill	$ 4,842	$ 4,554	$ 4,554	0%
Town of Carrboro	$ 2,690	$ 2,530	$ 2,530	0%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 29,693	$ 29,900	$ 29,900	0%
State Government	$ 22,037	$ 29,808	$ 29,808	0%
Federal Government				0
Other Grants: Foundations	$ 123,013	$ 66,734	$ 66,734	0%
Other Grants:				0
Miscellaneous/Other Revenue	$ 7,500	$ 5,000	$ 5,000	0%
Please list 3 largest Miscellanous sources:				
UNC Men's Basketball $ -				
$ -				
$ -				
Total Program Revenue	**$ 523,671**	**$ 442,771**	**$ 442,771**	**0%**
PROGRAM EXPENSES				
Compensation	$ 262,402	$ 239,132	$ 239,132	0%
Rent & Utilities	$ 74,457	$ 81,116	$ 81,116	0%
Supplies & Equipment	$ 17,698	$ 14,360	$ 14,360	0%
Travel & Training	$ -	$ 125	$ 125	0%
Other Expenses:	$ 169,114	$ 108,038	$ 108,038	0%
Please list 3 largest "Other Expenses":				
Allocation of agency overhead $ -				
$ -				
$ -				
Total Program Expenses	**$ 523,671**	**$ 442,771**	**$ 442,771**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Inter-Faith Council for Social Service - Support Circles**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations		$ 25,145	$ 20,902	-17%
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County			$ 7,449	0
Town of Chapel Hill			$ 3,283	0
Town of Carrboro			$ 1,894	0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way		$ 960	$ 1,280	33%
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ -**	**$ 26,105**	**$ 34,808**	**33%**
PROGRAM EXPENSES				
Compensation		$ 19,700	$ 26,267	33%
Rent & Utilities				0
Supplies & Equipment				0
Travel & Training				0
Other Expenses:		$ 6,405	$ 8,541	33%
Please list 3 largest "Other Expenses":				
Allocation of agency overhead $ -				
$ -				
$ -				
Total Program Expenses	**$ -**	**$ 26,105**	**$ 34,808**	**33%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: One grocery bag filled will essential food items

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	16,828	16,828	231,618	13.76
Estimated FY14-15	16,000	16,000	165,335	10.33
Projected FY15-16	16,000	16,000	160,771	10.05

2) Define one unit of service[+]: One hot, nutritious meal served at the Community Kitchen

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	84,645	84,645	214,638	2.54
Estimated FY14-15	80,000	80,000	222,397	2.78
Projected FY15-16	80,000	80,000	222,397	2.78

3) Define one unit of service[+]: One night of safe shelter at Community House

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	17,196	17,196	510,643	29.70
Estimated FY14-15	16,000	16,000	551,561	34.47
Projected FY15-16	16,000	16,000	551,561	34.47

4) Define one unit of service[+]: One night of safe shelter at HomeStart

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	13,424	13,424	523,671	39.01
Estimated FY14-15	14,000	14,000	442,771	31.63
Projected FY15-16	14,000	14,000	442,771	31.63

5) Define one unit of service[+]: A support circle for one household

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	-	-	-	-
Estimated FY14-15	5	5	26,105	5,221.00
Projected FY15-16	10	10	34,808	3,480.80

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program 1: Food Programs

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	2,299	2,240	2,240	Durham City	61	80	80
Female	3,750	3,360	3,360	Durham County	61	80	80
2. **Ethnicity**				Raleigh City	61	80	80
African-American	3,266	3,024	3,024	Wake County	61	80	80
Caucasian	1,270	1,176	1,176	Town of Chapel Hill	3,629	3,416	3,416
Hispanic	1,089	1,008	1,008	Town of Carrboro	1,875	1,736	1,736
Other	424	392	392	Orange County (includes Chapel Hill and Carrboro)	5,625	5,238	5,238
3. **Age**				Other (Alamance, Chatham, Person counties)	302	202	202
0-5 Years	0	0	0	Per cent of clients at, or below, federal poverty level	85%	85%	85%
6-18 Years	12	11	11				
19-50 Years	3,291	2,906	2,906		6,049	5,600	5,600
51+ Years	2,746	2,683	2,683				
Unknown	0	0	0	***TOTAL # OF CLIENTS SERVED***			

Data shows duplicated count of heads of household served at the Food Pantry. No intake is required to eat at the Kitchen.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program 2: Residential Programs

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	406	325	325	Durham City	132	100	100
Female	252	200	200	Durham County	33	30	30
2. **Ethnicity**				Raleigh City	41	35	35
African-American	366	290	290	Wake County	24	20	20
Caucasian	219	175	175	Town of Chapel Hill	118	95	95
Hispanic	47	40	40	Town of Carrboro	36	30	30
Other	26	20	20	Orange County	79	65	65
3. **Age**				Other (Alamance, Chatham, Person counties)	195	150	150
0-5 Years	36	30	30	Per cent of clients at, or below, federal poverty level	92%	92%	92%
6-18 Years	47	35	35				
19-50 Years	349	285	285	***TOTAL # OF CLIENTS SERVED***	658	525	525
51+ Years	220	175	175				
Unknown	6	0	0				

PROGRAM BENEFICIARY DEMOGRAPHICS

Program 3: Support Circles

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male		6		Durham City			
Female		16		Durham County			
2. **Ethnicity**				Raleigh City			
African-American		16		Wake County			
Caucasian		6		Town of Chapel Hill		12	
Hispanic				Town of Carrboro		6	
Other				Orange County		4	
3. **Age**				Other (specify)			
0-5 Years		4		Per cent of clients at, or below, federal poverty level		60%	
6-18 Years		8					
19-50 Years		8		***TOTAL # OF CLIENTS SERVED***		22	
51+ Years		2					
Unknown							

As this is a new program, we do not have actuals for last year or enough data to base any projections on. We hope to expand the program to serve twice as many families.

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Inter-Faith Council for Social Service**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 841,676	$ 745,000	$ 745,000	0%
Agency Generated Revenue (fees)	$ 106,188	$ 107,500	$ 107,500	0%
Local Government Grants:				
Orange County	$ 41,000	$ 41,000	$ 48,449	18%
Town of Chapel Hill	$ 18,000	$ 18,000	$ 21,283	18%
Town of Carrboro	$ 10,000	$ 10,000	$ 11,894	19%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 109,699	$ 111,635	$ 111,635	0%
State Government	$ 36,649	$ 59,616	$ 59,616	0%
Federal Government				0
Other Grants: Foundations	$ 530,373	$ 333,118	$ 320,492	-4%
Other Grants: Various	$ 125,329	$ 114,150	$ 114,150	0%
Miscellaneous/Other Revenue	$ 150,220	$ 211,464	$ 211,464	0%
Please list 3 largest Miscellanous sources:				
Interest $ -				
Rents $ -				
Transfer from Capital Fund $ -				
Total Agency Revenue	**$ 1,969,134**	**$ 1,751,483**	**$ 1,751,483**	**0%**
AGENCY EXPENSES				
Compensation	$ 1,127,180	$ 1,152,455	$ 1,152,455	0%
Rent & Utilities	$ 209,936	$ 197,902	$ 197,902	0%
Supplies & Equipment	$ 167,359	$ 114,352	$ 114,352	0%
Travel & Training	$ 149	$ 500	$ 500	0%
Other Expenses:	$ 443,021	$ 286,274	$ 286,274	0%
Please list 3 largest "Other Expenses":				
Specific Individual Assistance $ -				
Professional Fees $ -				
Miscellaneous $ -				
Total Agency Expenses	**$ 1,947,645**	**$ 1,751,483**	**$ 1,751,483**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 21,489**	**$ -**	**$ -**	**0**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent **	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1.0,1.0,1.0	100	97,994	97,994	97,994	.113,.105,.105	R&H
Finance Director	1.0,1.0,1.0	100	40,385	55,000	55,000	.047,.059,.059	R&H
Executive Administrative Assistant	1.0,1.0,1.0	100	43,320	44,000	44,000	.05,.047,.047	R&H
Residential Services Director	1.0,1.0,1.0	100	53,040	50,000	50,000	.061,.053,.053	R&H
Community Services Director	1.0,1.0,1.0	100	50,000	50,000	50,000	.058,.053,.053	R&H
Client Service Representatives	2.25,2.25,2.25	100	72,436	72,436	72,436	.084,.077,.077	R&H
Men's Shelter Managers – FT	2.0,2.0,3.0	100	68,872	68,872	95,576	.08,.074,.102	R&H
Men's Shelter Managers – PT	2.0,2.0,1.5	100	54,926	54,926	41,195	.063,.059,.044	None
Kitchen Coordinator	1.0,1.0,1.0	100	32,576	32,576	32,576	.038,.035,.035	R&H
HomeStart Shelter Managers – FT	3.0,3.0,3.0	100	97,662	98,328	98,328	.113,.105,.105	R&H
HomeStart Shelter Managers – PT	2.0,2.0,2.0	100	47,606	47,606	47,606	.055,.051,.051	None

Facilities Coordinator	1.0,1.0,1.0	100	34,360	34,360	34,360	.04,.037,.037	R&H
Project Manager	1.0,1.75,1.25	100	45,900	112,140	60,300	.053,.12,.064	R&H
Community House Social Worker	1.0,1.0,1.0	100	38,872	38,872	38,872	.045,.042,.042	R&H
HomeStart Case Manager	0,.37,.37	100	0	19,500	19,500	0,.021,.021	None
Medical Coordinator	1.0,1.0,1.0	100	41,544	60,000	60,000	.048,.064,.064	R&H
Volunteer Hours	22.0	100	43,312	43,000	43,000		N/A

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Chapel Hill Training Outreach Project, Inc./KidSCope

Street Address: 800 Eastowne Dr., Suite 105, Chapel Hill, NC 27514

Mailing Address: same as above

Website Address: chtop.org

Executive Director: Mike Mathers

Telephone: 919-490-5577, x223 E-Mail: mmathers@chtop.org

Contact Person: Linda Foxworth

Telephone: 919-644-6590, x4810 E-Mail: lfoxworth@kidscope.chtop.org

Fax: 919-644-7157 Federal ID Number: 58-204632

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$75,000	$85,000
Summary of intended use of funds: KidSCope will provide therapeutic mental health services and parent education to young Orange County children and their families.		
Town of Chapel Hill	$4,500	$6,000
Summary of intended use of funds: KidSCope will provide therapeutic mental health services and parent education to young Orange County children and their families.		
Town of Carrboro	$2,000	$10,000
Summary of intended use of funds: KidSCope will provide therapeutic mental health services and parent education to young Orange County children and their families.		

Executive Director

Date 1/21/15

Laura Nicholson

Board Chair

Date 1/21/2015

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:

KidSCope was created in 1988 under OPC Mental Health Center, by a coalition of professionals and child advocates, to address a documented need for specialized services to young children who are experiencing social, emotional, and/or behavioral difficulties.

   b. Years in Operation:

KidSCope was created twenty seven (27) years ago under OPC Mental Health Center with $25,000 from the Orange County Board of Commissioners. The program started with one employee, Linda Foxworth, who remains the Director.

   c. Mission or Vision Statement (if applicable):

The mission of KidSCope is "To provide comprehensive early childhood mental health services to young children, their families, and care providers, who are experiencing emotional, social, behavioral, and/or developmental issues." KidSCope is the only program designed exclusively to provide mental health and family support to children birth to 5 and their families in Orange County, and one of only a few in North Carolina.

   d. Brief History of Agency:

KidSCope was created in 1988 by a coalition of professionals and child advocates to address a documented need for specialized services to young children, who are experiencing social, emotional, and/or behavioral difficulties. Originally a program of OPC Area Program, KidSCope was funded by $25,000 in seed money from the Orange County Board of Commissioners. Specially designed to strengthen the systems that form the foundation of healthy early child development, KidSCope services prepare families for positive early experiences that provide "scaffolding" for the construction of sturdy brain architecture and the achievement of later skills and learning capacities. KidSCope staff serves children, families and child care providers in the "most natural environment", such as home or child care, using specialized mental health interventions and parent-child therapies that address relationship building.

In 2005, KidSCope services, previously a program of OPC Area program, were divested as required by North Carolina Mental Health Reform. At that time, KidSCope went through an internal reorganization to adapt to the non-profit world and became a program of Chapel Hill Training Outreach Project, Inc. Services were updated and retooled to the most current proven practices. Today, KidSCope staff is highly trained and stays ahead of the curve by using **evidence-based, and evidence informed practices** to response to the complex needs of young children and their families.

In KidSCope's twenty-seven (27) years of operation, the program has served over 8,000 children ages 0-6, their families and teachers, who were referred for problems ranging from developmental disabilities, to dangerous aggression and debilitating stress in their lives; many more have been profoundly affected by abuse, neglect, divorce or other stress producing, traumatizing factors. KidSCope is committed to serving these children and all of the adults to whom their care and early education has been entrusted.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

National statistical estimates indicate that 17-27% of preschool children have social-emotional development problems and/or behavior challenges. One in five children has a diagnosable mental disorder (DHHS, 2003). According to a 2012 North Carolina Institute of medicine report, 91,000 young children in NC face mental health issues that impact development. The report released new recommendations for state policies to strengthen the social-emotional and mental health foundation for the state's young children. Research shows that early experiences, from age 0 to 5, have a strong influence on a child's developing brain, providing a time of great opportunity and vulnerability. According to NC Kids Count, there are currently 7,704 children, age 0-5, living in Orange County. Therefore, approximately 1,310 to 2,080 of Orange County children may experience social and emotional difficulties.

"An extensive body of scientific research has shown us that developing positive social-emotional and mental health in those early years – from 0 to 5 – is key not only to future success but simply to healthy development," said Pam Silberman, now past president of the NCIOM. *"Significant adversity in early childhood, including trauma, abuse, living with a parent with substance use disorder and being raised in persistent poverty, can, if left untreated, leave scars that literally last a lifetime. In North Carolina we have a strong tradition of investing in early childhood education but we must also focus on our children's well-being in order to secure a strong future."*

The Adverse Childhood Experiences (ACE) Study conducted by Kaiser Permanente in the late nineties produced results that continue to be the reference point for children exposed to trauma. Children with xposure to at least one category of childhood trauma will be more likely to have mental health disorders such as depression, and post-traumatic stress disorders as adults. The more categories of trauma experience in childhood, the greater the likelihood of adult substance abuse, heart and liver disease, smoking, obesity, and other health concerns that compromise well-being, and a secure and economically stable future which can lead to a cycle of poverty. The number of children in poverty has increased in Orange County since 2009 from 9.4% to 16.8% in 2011. This number has increased even more since then, with high poverty areas in the County of up to 22%.

As James Heckman, renowned Professor of Economics, in his brief, *Invest in Early Childhood Development: Reduce deficits, strengthen North Carolina 's economy,* explains, "A critical time to shape productivity is from birth to age 5, when the brain develops rapidly to build the foundation of cognitive and character skills necessary for success, school, health, career, and life. Early childhood education fosters cognitive skills along with attentiveness, motivation, self-control and sociability-the character skills that turn knowledge into know-how and people into productive citizens."

Preschool children are three times more likely to be "expelled" than children in grades K-12, (Gilliam, 2005). One in every 6 children across all economic levels and racial groups has special

needs (Dunkle 2005), but less than **30%** of all children with disabilities are identified prior to beginning kindergarten (Glascoe & Shapiro, 2005)

In *Early Intervention as Prevention: Addressing Trauma in Young Children,* Betsy McAllister Groves of the Early Trauma Treatment Network, says that young children bear a disproportionate share of violence and abuse in the home. **Infants and toddlers experience the highest rates of child maltreatment of any age group.** Recent brain research has led to the knowledge of sensitivity of very young children to their environment and malleability of the developing brain. This knowledge has increased the importance of early identification of significant childhood stressors**. Thus, a greater capacity to identify children who are affected by trauma must be met with greater resources for intervention.**

Jack Shonkoff, M.D., Director of the Center on the Developing Child at Harvard University, reinforces the idea of "toxic stress" in the lives of young children in The Science of Early Childhood Development: Closing the Gap Between What We know and What We Do. "*Toxic stress in early childhood is associated with persistent effects on the nervous system and stress hormone systems that can damage developing brain architecture and lead to lifelong problems in learning, behavior and both physical and mental health.*" He went on to say that supportive relationships and positive learning experiences begin at home, but can also be provided through services that have well-documented effectiveness. Highly specialized interventions are needed as early as possible for children experiencing tolerable or toxic stress. These preventive interventions are more efficient and produce more favorable outcomes than later remediation. In addition, in their publication The Foundations of Lifelong Health Are Built in Early Childhood, 2010, the Center on the Developing Child at Harvard University identified three domains that establish a context with in which the early roots of physical and mental well being are nourished. Included are 1) a stable and responsive relationships that provide young children with consistent, nurturing and protective interactions with adults, 2) safe and supportive environments, and 3) positive physical health.

KidSCope interventions with families speak to all of the above needs because they focus on the development of healthy families relationships. These interventions include evidenced-based treatment modalities such as Parent Child Interactive Therapy, Child Parent Psychotherapy, Trauma Based Cognitive Behavioral Therapy, Child Care Mental Health Consultation and The Incredible Years parenting program. KidSCope focuses on providing access to services for those who have Medicaid, private insurance or are uninsured. Many KidSCope services are free to families and child care providers. KidSCope has specialized in providing these services for nearly twenty-seven (27) years to young Orange County children and their families and has a proven and successful track record.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Operational Changes

KidSCope is committed to increasing training and emphasis on education and treatment aimed at reducing and preventing child abuse/neglect and domestic violence. Staff is trained in "evidence based" practices such as Parent Child Interactive Therapy (PCIT) and Child Parent Psychotherapy. PCIT is a "best practice" model for treating children age 2-8 and their families who have experienced domestic violence and Child Parent Psychotherapy (CPP) is a similar model for children ages birth to three and their families.

In 2009, KidSCope received a two-year grant to fund The Incredible Years from the North Carolina Department of Social Services. The Incredible Years is a "best practice" model for providing parenting education that KidSCope is implementing in Orange County in collaboration with Chapel Hill Carrboro Head Start. In 2013, this grant was funded for an additional three years. It has been successful and recognized state-wide for the results it produces in supporting children and families.

Beginning this Spring (2015), KidSCope will be focusing on two new collaborative efforts in the Orange County Community, the Family Success Alliance, and the new Triangle United Way application process, both based on the Collective Impact model.

KidSCope will again seek funding for our KidSCope Community Outreach Program only. Medicaid reimbursement rates that took effect in 2011, 2012, and 2013 still represent an annual loss of funding, and threaten our ability to serve all of the children referred. Medicaid funding is a large part of our revenue. Although we are successful at accessing Medicaid funds, the entire mental health system is still fragile. The volatility of the state and local economic downturn continues to threaten our funding as well. In 2012, Orange Person Chatham Area Program joined Piedmont Behavioral Health (PBH, now called Cardinal Innovations Health Care Solutions), a Managed Care Organization, and become a part of the state Medicaid Waiver. KidSCope is a provider of services under this health care company. The transition to Cardinal has gone very smoothly for us administratively. However, the uncertainly of the future of the mental health system under DHHS including the possibility of outsourcing mental health to the private sector, has everything on hold. Until this crucial decision is made, issues regarding rate increases and development and implementation of new services will not be high priorities.

In 2013, KidSCope received $24,612 from The United Way of the Greater Triangle to support mental health services to children who are uninsured, underinsured, and who have complicated non-billable needs. This amount, however, represents 40% of the amount that we requested. Triangle United Way is embarking on a new funding process that is focused on Community Impact that generates positive outcomes for Children and Families. We are unsure at this time about our funding levels from TUW.

Financial Changes

Funding increases and Justification

Funding increases have become necessary because of increased referrals and services provided for the last two years (2013-14 to 2014-15). For 2015-16, KidSCope is requesting an increase in the following areas:

a. Orange County- referrals increased 9 %
b. Town of Chapel Hill- referrals increased 75%
c. Town of Carrboro-referrals increased 88%, including Carrboro referrals for Hispanic families that increased 71% in the past two years.

We are hopeful that the KidSCope clinical therapy services for young children and their families have proven their value and funding will be increased.

KidSCope will continue to focus on development of outcomes which reflect an increased emphasis on long term funding security from local and state sources, program evaluation, cost effectiveness of program, and creative resource distribution to meet identified needs and

available funding streams. KidSCope will continue to seek funding from local, state, and federal sources.

4. *Outline any operational and/or financial changes being considered on the program to be funded for FY 2015-16. Indicate whether these are ongoing or new sources.*

Funder	**Purpose**	**Amount**	**Status**
Orange Co. Partnership for Young Children	KidSCope Child Care Consultation	$51,000	Ongoing
Chatham County Partnership for Children	ABCD	$54,866	Ongoing
Chatham County Partnership for Children	Child Care Behavior Consultation	$26,479	Ongoing
Orange County Human Services	Mental Health Services for children and families	$85,000	New/Ongoing
Town of Chapel Hill	Mental Health Services	$6,000	New/Ongoing
Town of Carrboro	Mental Health Services	$10,000	New/Ongoing
NCDSS	The Incredible Years Parenting Program	$125,000	Ongoing
Cardinal Innovations Contract	Child Care Consultation program	$40,000	Ongoing
Greater Triangle United Way	KidSCope Outreach Program	$ 24,612	Ongoing
Strowd Roses Foundation	KidSCope Outreach Program	$10,000	New
	Total	**$432,957**	

We continue to receive funding from NC Division of Mental Health, Town of Carrboro, Town of Chapel Hill, and the Orange County Government. We research possible funding through foundations and trusts as well as local, state and federal sources.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies to accomplish or enhance the Projected Result(s) in the Program(s) to be funded.

KidSCope coordinates services with the following agencies in order to ensure that children in need are identified and referred in a timely, efficient manner. Collaborations between KidSCope and the following agencies increase and enhance our abilities to provide appropriate and comprehensive interventions and services. Through our partners we are able to offer a continuum of care, or "pipeline" for families of preschool children in Orange County to maximize community impact. **Our partnerships occur across three main goals as follows:**

I. To strengthen the social-emotional and mental health foundation for young children. Research shows that early experiences, from age 0 to 5, have a strong influence on a child's developing brain, providing a time of great opportunity and vulnerability.

- **Children's Developmental Services Agency** (CDSA): This agency is mandated to evaluate and coordinate services for children 0-3 with developmental disabilities in the Infant-Toddler system. KidSCope works closely with Service Coordinators in Orange County to facilitate services for children in this age group. KidSCope refers children for evaluation and **provides** early intervention services to identified children through an annual contract. These early interventions occur with the child and parent and are focused on parent education and child development, including building positive relationships and social/emotional skills.

- **Orange County Department of Social Services (DSS):** The KidSCope Child Care Consultant Program and the KidSCope Outreach Program receive referrals from Child Care Subsidy as well as Child Protective Services to screen and provide mental health services to children in their care who are in early childhood settings, in foster care, or living with parents. Specialized evidence based treatment modalities such as Parent Child Interactive Therapy and Child Parent Psychotherapy are used to build positive relationships in families who are struggling with children whose behavior is challenging. KidSCope works very closely with DSS workers to identify and serve children in the Child Protective Services system. Children who remain with parents, and children who are placed in foster care are served by KidSCope. Children of parents participating in job training through the Work First program are frequently placed in the KidSCope Children's learning Center for child care. KidSCope is able to support both the child and the family while they take the steps necessary to reach economic stability.

II. To develope positive social-emotional and mental health in the early years – from 0 to 5 – is key, not only to future success, but also to healthy development. Success in child care is essential in promoting school success.

- **Child Care Services Association**: (CCSA): This agency provides technical assistance services to early childhood educators in areas other than targeted mental health concerns. KidSCope has an interagency collaboration agreement with Promoting Healthy Social Behaviors in Child Care Centers, a state program implemented by CCSA which identifies the differences in the two programs. The KidSCope Child Care Consultant works with local child care centers to assist teachers in helping children manage their social/emotional/behavioral issues so that they may be successful in school. Additionally, the KidSCope Child Care Consultant refers families to CCSA for child care subsidy information.

- **Orange County Health Department**: KidSCope refers children to OCHD for the CC4C program. OCHD refers children to KidSCope to work with children and families that need assistance with relationship building, parenting skills, and mental health interventions. The OCHD Child Care Health Consultant assists child care centers in providing healthy, safe environments for children. KidSCope also does joint planning and committee activities with OCHD through the Orange County Preschool Interagency Council and the Orange Chatham Early Childhood Mental Health Task Force.

- **OCPYC:** KidSCope has collaborated with the Orange County Partnership for Young Children (Smart Start) since 1994. The Partnership funds the KidSCope Child Care Consultation Program jointly with Cardinal Innovations. Our Developmental Day Center, the Children's Learning Center in Hillsborough, contracts with OCPYC to

provide services for children eligible for NCPreK. OCPYC staff refers families to KidSCope for child care, and for mental health services.

- **Orange County Schools** evaluate and coordinate early intervention services for children residing in the Orange County school district aged 3-5 with, or at risk for, developmental disabilities. KidSCope and the OCS staff meet regularly to coordinate for evaluation and services for children. OCS regularly refers children to KidSCope for mental health services. OCS provides space for KidSCope at one of their buildings at Hillsborough Elementary at no charge, while OCS places children with special needs in "developmental day" slots to address their identified needs.

- **Chapel Hill/Carrboro City Schools** evaluate and coordinate early intervention services for children residing in Chapel Hill/Carrboro school district aged 3-5 with, or at risk for, developmental disabilities. KidSCope refers children for evaluation and accepts referrals for mental health services. KidSCope works under contract with CHCCS to provide mental health consultation to the district's Pre K Head Start classrooms.

III. To support Family Success strategies that promote positive relationships, physical and mental health well-being, and economic stability

- **Cardinal Innovations/OPC Local Management Entity**: This agency is the local authority for state funded mental health services, both Medicaid and state-funded. KidSCope provides services to young children and their families through an annual contract process. KidSCope has also applies for and receives funding through Cardinal for implementation of innovative early childhood mental health services and training opportunities. Services provided through our partnership with Cardinal Innovations are age appropriate, evidence- based, and occur mostly in the home with families and children.

- **Head Start/Early Head Start:** These programs are available to low income families and families of children with special needs who qualify. KidSCope collaborates with both Chapel Hill/Carrboro Head Start and Orange County Head Start by giving and receiving referrals for families of young children. Since 2009 KidSCope has collaborated with Orange County and Chapel Hill/Carrboro Head Start programs to provide the national evidence-based parenting program for families of children who are age 3-8, **The Incredible Years**, funded through a grant from NC Department of Social Services. The program is designed to promote positive relationships and support parents/family members in improving parenting skills. **The Incredible Years** program has been very successful thanks to our Partnership with CHCCS PreK/Head Start. Classes are currently available in English and Spanish at Northside Elementary School through KidSCope.

- KidSCope participates in and provides leadership to the Orange Chatham Early Mental Health Mental Health Task Force which was formed in response to the NC Institute for Medicine Early Childhood Social Emotional Development and Mental Health Study, and to the Orange County Preschool Interagency Council. These organizations are committed to the support children and families through the coordination of our early childhood systems

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the program(s) to be funded?

At KidSCope, we believe that service providers working with children and families must utilize cultural competency skills throughout their daily work. We define cultural competency as "the ability to think, feel, and act in ways that acknowledge, respect, and build on ethnic, [socio-] cultural, and linguistic diversity" (Lynch & Hanson, 1993). KidSCope service providers should be aware that children's development, learning and outlook are affected by their language and culture, and that cultural context has a major impact on parenting and teaching practices, family values and young children's socio-emotional development.

Cultural competency includes self-awareness and awareness, understanding, and respect for others' cultural perspectives (Lynch & Hanson, 2004). Cultural context will influence interactions between service providers and those receiving services. It is important for service providers to be familiar with and acknowledge the significance of common cultural influences and patterns within various ethnic, social, and linguistic backgrounds. It is also important that service providers are aware of their own cultural background and how it influences their interactions with the children and families they serve. KidSCope supports its staff in developing these cultural competency skills through continuing education and training at conferences and workshops, through mentorship and feedback, as well as through continuing self-education.

In addition to staff training and awareness, KidSCope has put several strategies in place in order to ensure mindfulness of cultural context while at the same time providing effective early intervention services: KidSCope uses bilingual materials to assess childrens' needs and to communicate with families. KidSCope ensures all reading materials are no higher than a fifth grade reading level for educational differences. Services are provided to children, families, and child care centers/homes free of charge to accommodate all socio-economic levels. Additionally, children are not required to have a label associated with their developmental, social or behavioral differences in order to receive services.

KidSCope provides most services in Spanish. The KidSCope therapy office in Carrboro is walkable and has been very convenient to Spanish-speaking families in Carrboro and Chapel Hill.

6. Please check the box (no more than two) that best describes the category of Program(s) to be funded.

- ☐ Arts & Cultural
- ☐ Education
- ☐ Health and Nutrition
- ☐ Recreation & Leisure
- ☐ Senior and/or Disabled
- ☐ Safety Net for Vulnerable/Disadvantaged Orange County Residents
- ☐ Youth
- ☒ Other: Early Childhood Mental Health

Section II: Program Information

A. Program Goals, Objectives and Evaluation

IF YOU ARE SEEKING FUNDING FOR MORE THAN ONE PROGRAM, PLEASE IDENTIFY BY LABELING PROGRAM (1), PROGRAM (2)…UNDER EACH QUESTION

Section II: Program Results

A. FY 2012-13 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
The goal of the KidSCope Community Outreach Program is to provide families of preschoolers in Orange County with **customized assessment and evaluation to determine strengths and needs,**	Assess/evaluate children who are referred to the KidSCope Program to determine needs. .	100 % of referred children were assessed to determine needs.	Assess children's condition before and after treatment using checklists and other assessment tools.
Evidenced-based interventions that help children develop positive behavior social skills,	Provide therapy or other individual interventions for children to improve behavior and social skills.	100 % of parents surveyed said KidSCope helped their child get along better with other children, and with adults.	Survey parents to determine changes in children's behavior and social skills.
Individual counseling and education for families to help increase their parenting skills and reduce stress.	Provide parent education to families to increase knowledge of successful parenting.	100 % of parents surveyed said they had learned new parenting strategies and understanding of child development.	Assess parents' knowledge before and after parent education with evaluation forms.

If program(s) did not meet its stated goal(s), please explain:

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
The goal of the KidSCope Community Outreach Program is to provide families of preschoolers in Orange County with **customized assessment and evaluation to determine strengths and needs,**	Assess/evaluate children who are referred to the KidSCope Program to determine needs. Provide therapy or other individual interventions for children to improve behavior and social skills.	Children referred for services will be assessed. Out of 122 students participating in the program, 70% will show improvement.	Assess children's condition before and after treatment using checklists and other assessment tools.
Evidenced-based interventions that help children develop positive behavior social skills,	Provide therapy or other individual interventions for children to improve behavior and social skills.	90% of parents surveyed will report that KidSCope helped their child get along better with other children, and 70% with adults.	Survey parents to determine changes in children's behavior and social skills.
Individual counseling and education for families to help increase their parenting skills and reduce stress.	Provide parent education to families to increase knowledge of successful parenting.	90 % of parents surveyed will report they learned new parenting strategies and understanding of child development.	Assess parents' knowledge before and after parent education with evaluation forms.

Section III.
Program Budget

AGENCY NAME: **Chapel Hill Training Outreach Project, Inc. (KidSCope)**

	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
PROGRAM REVENUE				
Private Donations	$ 14,710	$ 14,100	$ 14,100	0%
Program Generated Revenue (fees)	$ 44,559	$ 45,000	$ 45,000	0%
Local Government Grants:				
Orange County	$ 75,000	$ 75,000	$ 85,000	13%
Town of Chapel Hill	$ 4,500	$ 4,500	$ 6,000	33%
Town of Carrboro	$ 2,000	$ 2,000	$ 10,000	400%
Other Local: Strowd Roses	$ 5,000		$ 10,000	0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 24,612	$ 24,612	$ 24,612	0%
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 170,381**	**$ 165,212**	**$ 194,712**	**18%**
PROGRAM EXPENSES				
Compensation	$ 160,600	$ 164,700	$ 169,227	3%
Rent & Utilities	$ 13,889	$ 11,825	$ 14,108	19%
Supplies & Equipment	$ 2,080	$ 2,600	$ 2,600	0%
Travel & Training	$ 8,369	$ 7,500	$ 9,600	28%
Other Expenses:	$ 40,951	$ 36,871	$ 36,720	0%
Please list 3 largest "Other Expenses" fy 14-15:				
Indirect costs to CHTOP, Inc. $ 16,680				
Occupancy costs $ 5,800				
Professional Fees - Consultants $ 4,640				
Total Program Expenses	**$ 225,889**	**$ 223,496**	**$ 232,255**	**4%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (55,508)**	**$ (58,284)**	**$ (37,543)**	**36%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: Actual Number of children and their families receiving services

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	250	250	225,889	903.56
Estimated FY14-15	305	290	$223,496	770.68
Projected FY15-16	320	304	$232,255	764.00

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: KidSCope Outreach

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	60	74	78	Durham City	1	1*	0
Female	37	48	50	Durham County	0	0	0
2. **Ethnicity**				Raleigh City	0	0	0
African-American	8	12	13	Wake County	0	0	0
Caucasian	28	35	35	Town of Chapel Hill	36	42	43
Hispanic	41	50	55	Town of Carrboro	22	32	35
Other	20	25	25	Orange County	38	47	50
3. **Age**				Other (specify)	0	0	0
0-5 Years	92	122	128				
6-18 Years	5	0	0	Per cent of clients at, or below, federal poverty level			
19-50 Years	0	0	0				
51+ Years	0	0	0				
Unknown	0	0	0	***TOTAL # OF CLIENTS SERVED***	97	122	128

*Child of a Chapel Hill/Carrboro City Schools PreK-Head Start teacher.

Section VI.
Comparative Budget for Entire Agency

AGENCY NAME: **Chapel Hill Training Outreach project, Inc. (KidSCope)**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 14,710	$ 14,100	$ 14,100	0%
Agency Generated Revenue (fees)	$ 44,559	$ 45,000	$ 45,000	0%
Local Government Grants:				
Orange County	$ 75,000	$ 75,000	$ 85,000	13%
Town of Chapel Hill	$ 4,500	$ 4,500	$ 6,000	33%
Town of Carrboro	$ 2,000	$ 2,000	$ 10,000	400%
Other Local: Strowd Roses	$ 5,000		$ 10,000	0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 24,612	$ 24,612	$ 24,612	0%
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 349,857	$ 327,995	$ 328,863	0%
Please list 3 largest Miscellanous sources: fy 14-15				
nart Start/NC DSS grants Orange & Chatha $ 287,995				
Cardinal Innovation $ 40,000				
$ -				
Total Agency Revenue	**$ 520,238**	**$ 493,207**	**$ 523,575**	**6%**
AGENCY EXPENSES				
Compensation	$ 447,936	$ 434,683	$ 434,952	0%
Rent & Utilities	$ 25,927	$ 22,985	$ 27,449	19%
Supplies & Equipment	$ 20,275	$ 21,085	$ 23,691	12%
Travel & Training	$ 18,462	$ 16,374	$ 17,071	4%
Other Expenses:	$ 63,146	$ 56,364	$ 57,955	3%
Please list 3 largest "Other Expenses": fy 14-15				
Indirect cost to CHTOP, Inc. $ 31,938				
Occupancy costs $ 6,800				
Professional Fees - Consultants $ 3,600				
Total Agency Expenses	**$ 575,746**	**$ 551,491**	**$ 561,118**	**2%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (55,508)**	**$ (58,284)**	**$ (37,543)**	**36%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Chapel Hill Training Outreach Project, Inc./KidSCope

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
KidSCope Director	1.00	0.35	32,220	32,220	32,732	6%	R
Office Assistant	.94	0.77	30,362	30,362	30,969	6%	R,H
Program Assistant	.20	0.50	1,855	1,900	1,900	0%	
Bilingual Child Therapist	.75	0.49	41,105	41,105	41,599	7%	R,H
Child Therapist	.87	0.91	45,241	45,241	46,123	8%	R,H
Child Care Consultation/Parent Educator	1.00	1.00	47,766	47,766	47,766	9%	R,H
Programs Coordinator	1.00	1.00	53,570	53,570	53,570	10%	R,H
Child Care Consultant/Parent Educator	.80	1.00	42,878	42,878	42,878	8%	R,H
Programs Coordinator	1.00	1.00	53,570	53,570	53,570	10%	R,H
Bilingual Parent Educator	.36	2.00	18,720	12,240	9,360	2%	
VOLUNTEER HOURS+ The only volunteers we have are Advisory Council members who meet 5 times a year and these are not counted as agency program volunteer hours.							

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.

- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Ligo Dojo of Budo Karate

Street Address: 1808 Martin Luther King Jr. Blvd, Chapel Hill NC 27514

Mailing Address: 2518 Millwood Ct, Chapel Hill NC 27514

Website Address: www.ligodojo.com

Executive Director: Nathan Ligo

Telephone: 919-923-6915 E-Mail: nligo@hotmail

Contact Person: Same as above

Telephone: E-Mail:

Fax: Federal ID Number: 58-2484936

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$2,000	$3,000
Program seeks Orange County funding to support our continuing Young Warriors Program in Orange County. The Young Warriors program instills discipline, increases self-esteem, and physical and mental health in referred, disadvantaged youth through martial arts training. Funding allows youths to attend ten or more weeks of karate training, two or more times per week at our location at Cedar Falls Shopping Center in Chapel Hill where have now been for open 3 years. Last fiscal year we served 23 Chapel Hill, Carrboro and Orange County youth and estimate that we will serve 35 this year. This location continues to contribute toward our goal of financial independence as we continue to build our dues paying student body, although this growth has been slower than we anticipated. We ask that Orange County make the maximum investment that it can, now, for the greatest possible return on its investment: At some point in the near future we will become self-sufficient, and WILL continue on here in Orange County, serving needy youths long into the future.		
Town of Chapel Hill	$2,000	$3,000
Program seeks Town of Chapel Hill funding to support our continuing Young Warriors Program in Chapel Hill. The Young Warriors program instills discipline, increases self-esteem, and physical and mental health in referred, disadvantaged youth through martial arts training. Funding allows youths to attend ten or more weeks of karate training, two or more times per week at our location at Cedar Falls Shopping Center in Chapel Hill where have now been for open 3 years. Last fiscal year we served 23 Chapel Hill, Carrboro and Orange County youths and estimate that we will serve 35 this year. This location continues to contribute toward our goal of financial independence as we continue to build our dues paying student body, although this growth has been slower than we anticipated. We ask that Chapel Hill make the maximum investment that it can, now, for the greatest possible return		

on its investment: At some point in the near future we will become self-sufficient, and WILL continue on here long into the future, providing this service for youths that need us.		
Town of Carrboro	$1,900	$3,000
Program seeks Town of Carrboro funding to support our continuing Young Warriors Program in Chapel Hill serving Carrboro youths. The Young Warriors program instills discipline, increases self-esteem, and physical and mental health in referred, disadvantaged youth through martial arts training. Funding allows youths to attend ten or more weeks of karate training, two or more times per week at our location at Cedar Falls Shopping Center in Chapel Hill where have now been for open 3 years. Last fiscal year we served 23 Chapel Hill, Carrboro and Orange County youths and estimate that we will serve 35 this year. This location continues to contribute toward our goal of financial independence as we continue to build our dues paying student body, although this growth has been slower than we anticipated. We ask that Carrboro make the maximum investment that it can, now, for the greatest possible return on its investment: At some point in the near future we will become self-sufficient, and WILL continue on here long into the future, providing this service for youths that need us.		

Executive Director

1/22/2015

Date

Board Chair

1/22/2015

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: Chapel Hill/Carrboro native Nathan Ligo incorporated The Society for the Betterment of the Human Condition through the Training, Instruction and Propagation of Budo Karate as a 501.c.3 in 1999.

   b. Years in Operation: After running a residential program for several years, Ligo Dojo of Budo Karate (our registered, shorter d.b.a. name) opened our its first location in 2006 is in its 7th year of operation, and our second location, Ligo Dojo of Budo Karate in Chapel Hill, has been in operation since 2011.

   c. Mission or Vision Statement (if applicable): Our mission is to 1. To strengthen the minds, bodies and hearts of young people through karate training, because hard physical training leads to increased spiritual strength and patience, which in turn leads to the ability to make better life decisions. 2. To deepen relationships between people of diverse backgrounds through hard training, an inherent 'equalizer' between people. 3. To strengthen American communities (starting in North Carolina, especially in Durham and Orange Counties) by thus strengthening individuals who might then serve as role models for other members of the community. 4. To create individuals who are 'community minded' and open minded people who VALUE works for the sake of community rather than merely for personal economic and social advancement.

   d. Brief History of Agency: Against significant odds Ligo Dojo's Young Warriors Program has set an example in Durham and Chapel Hill among other nonprofit agencies that many aspire to equal. Funded over the last 6 years by the NC Governor's Crime Commission (GCC), Durham and Orange County's Juvenile Crime Prevention Councils (JCPC), Triangle Community Foundation (TCF), the City of Durham, the Cities of Chapel Hill and Carrboro, Orange County, Wells Fargo Foundation, the Mary Duke Biddle Foundation, Strowd Roses Foundation, and others, the Young Warriors Program accepts referrals of disadvantaged youth from over a dozen agencies in Durham and Orange County.

      Chapel Hill/Carrboro native Nathan Ligo founded The Society for the Betterment of the Human Condition through the Training, Instruction and Propagation of Budo Karate in 1999, and opened Ligo Dojo of Budo Karate in Durham (a d.b.a. name for the same 501.c.3 nonprofit) in 2006, and now our second location, Ligo Dojo of Budo Karate in Chapel Hill, in 2011. It has become a remarkably common occurrence for us that parents tell us "my child is SO much better behaved now at home," or "my child's teacher at school told us yesterday how she's doing so much better in class, and we know it's all because of karate!" or

even "my child hasn't gotten in a single fight at school since he's been here at the dojo!"

Beyond this type of recognition we have been recognized in numerous ways. ED Nathan Ligo was interviewed on ABC news (interview available on our website), the Raleigh N&O named him Tar Heel of the Week one week in 2012, and Governor Perdue wrote him a handwritten card congratulating him for his organization's successes. In 2010 Triangle Community Foundation awarded us its state-wide *What Matters Innovation Award for Nonprofit Excellence.*

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Ligo Dojo's outpost in Orange County at Chapel Hill's Cedar Falls Shopping Center in Chapel Hill has become a rare, and much needed facility in Orange County. Through it we bring positive youth development programming to a community that DOES have a demographic of at risk kids, and expected corresponding problems including juvenile crime, drug abuse and gang activity. As we have been in Durham for year, we work with DJJ referrals who are on diversion plans, with those under court supervision, and with those on post-release supervision, as well as "prevention kids" who are at-risk but are not yet involved in delinquent activity. We are actively working with law enforcement officers and school social workers who can identify youth who can benefit from pro-social activities and environments.

Orange County JCPC has determined that gang activity, presence of drugs, and occurrence of juvenile crime are priority needs to be addressed. Needs assessment by Juvenile Justice Court counselors indicate that 9% of juveniles assessed at intake have substantial gang involvement, and 62% of youth have serious school behavior problems. Agencies currently involved in delinquency intervention and suppression efforts lack features that can provide sufficient impact. One reason why young people become involved in delinquent activity is the lack of constructive after-school alternatives. This project will allow Chapel Hill/Carrboro and Orange County's at-risk youth to participate in a constructive after-school activity that exists as an enticing alternative to the gang/crime norm within underprivileged communities.

JCPC has additionally determined that and 72% of adjudicated youth come from homes where parents/guardians have marginal to inadequate supervision skills. The Young Warriors program provides an opportunity for young people to train WITH their parents in an activity that has been shown to make people of all ages stronger and to bring parents and their kids closer together, and to a point of better shared understanding. That said, the program is not a miracle cure, and although we invite and encourage parents to participate, the frequency with which parents of court-referred youth do so is LESS than the frequency with which the parents of prevention youth do.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

We cannot emphasize enough the critical dynamic of our transition from an agency dependent on grants to one that we believe will become financially independent. Compared to Durham, our expenses in Chapel Hill are enormous. This move was made, thanks to a fairly large expansion loan awarded to us from Self Help Credit Union, and granted largely because of our reputation there for continued growth and success. We are currently enrolling dues-paying students in Chapel Hill/Carrboro at a frequency and at a dollar amount that is carrying us towards an ability to cover our expenses, eventually without grant dependency. Indeed, one of the reasons why we took this step was because grant monies across the board are decreasing everywhere and nonprofit organizations that are dependent on grants are failing. However, we still rely on several pots of grant money as we move towards independence, and Chapel Hill, Carrboro and Orange County all represent separate small pots of money that we HAVE worked into our cash flow projection for the next two years as we make that transition. No Young Warriors Program money is used to support the SHCU loan, of course, or the paying students, but the Program can only exist with the support of the overall location, and vice versa. The two are mutually supportive. We are a 501.c.3 nonprofit and all funds generated from paying students support the nonprofit's mission of serving at-risk youth and bettering the community through karate training.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

I. EXTERNAL
   i. Wells Fargo (branch awards) – $1,000 confirmed, ongoing
   ii. Orange County JCPC – $19,000 highly likely, ongoing
   iii. Orange County matching funds – $3,600 highly likely, ongoing
   iv. Town of Chapel Hill – $3,000 pending, ongoing
   v. Town of Carrboro – $3,000 pending, ongoing
   vi. Orange County – $3,000 pending, ongoing
   vii. Wells Fargo (corporate award) – $4,000 pending, new
   viii. Strowd-Roses – $5,000 pending, ongoing

II. INTERNAL
   i. Dues paying students – $5,000 ongoing

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

We currently accept referrals from many agencies serving disadvantaged youth. They include but are not limited to:

- The Department of Juvenile Justice (court-involved youth)
- Carolina Outreach
- Big Brothers and Big Sisters of the Carolina's (mentoring)
- Exchange Club Family Center
- We continue to be popular among mental health agencies.
- Law enforcement and school social workers can also make referrals.
- We have created an online referral and tracking system that has been very well appreciated by referring counselors in that they can track their kids' attendance and performance online.
- We accept nearly all referrals, and invite needy kids to participate indefinitely.
- Another unique quality of our program is that all students train together; creating a pro-social environment where no one is identified as being "a referral". In this way our regular student body provides a strong core as new students (referral and full dues paying alike) come together to train.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Interestingly, our data shows a demographic distribution for the kids we've served in Chapel Hill/Carrboro has turned out to be similar to Durham even though Chapel Hill/ Carrboro's overall demographic is fairly different than Durham's. This is because our program serves the underprivileged and the demographic of the underprivileged tends to be fairly constant.

The grant-review committee can see from the demographics in the application that roughly 30% of the kids our Young Warriors Program serves have been African American, and nearly 30% Hispanic. The fact that our agency relies on referrals from a wide spectrum of public service agencies means that that kids who are referred are, by definition, of a disadvantaged population.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability

Education				
Health and Nutrition				
Job Training				
Sports and Arts Activities	X	X		
Pre-School Activities				
After-School Activities	X			
Mentoring				
Transportation				
Housing				
Other	X			

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
50% Participants will have no new complaints during program participation.	Referred youth attend 2-5 two-hour classes per week. Court referred kids are often ordered to attend 20 classes. Karate is an activity that: • teaches all students to be more "upstanding" in terms of personal behavior and personal presentation • students will learn to stand up taller, walk lines in life more straight than before, • interact with figures of authority in a more respectful manner improving pro-social skills and supporting factors—including physical health, confidence, self-esteem, self-discipline, anger management and conflict resolution—youths become less inclined to get themselves into trouble with crime, gangs, drugs, etc.	Out of 28 youth served 22 had no new complaints during program participation. 79% result.	At termination referral source fills out check list to answer these questions.
40% Participants successfully/satisfactorily completing the program will have no new complaints in the 12 months following	Same as above	N/A	No data yet on 12 months post termination

completion.			
60% Participants completing the program will demonstrate a reduction in problem behaviors for which they were referred by termination.	Same as above	Out of 28 youth served 22 demonstrated a reduction in problem behaviors for which they were referred. 79% result.	At termination referral source fills out check list to answer these questions.
50% of children admitted will participate in a promotion test at the end of their term(s) and will receive the validation of new belt color/promotion.	Same as above	Out of 28 youth served 20 participated in a promotion test. 73% result	Class records were checked to verify which students attended belt test.
50% Participants completing the program will demonstrate improvement in targeted skills as specified in the individual service plan by termination.	Same as above	Out of 28 youth served 22 demonstrated improvement in targeted skills as specified in the individual service plan. 79% result	At termination referral source fills out check list to answer these questions

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
80% Participants will have no new complaints during program participation.	Referred youth attend 2-5 two-hour classes per week. Court referred kids are often ordered to attend 20 classes. Karate is an activity that: • teaches all students to be more "upstanding" in terms of personal behavior and personal presentation • students will learn to stand up taller, walk lines in life more straight than before, • interact with figures of authority in a more respectful manner improving pro-social skills and supporting factors—including physical health, confidence, self-esteem, self-discipline, anger management and conflict resolution—youths become less inclined to get themselves into trouble with crime, gangs, drugs, etc.	80% Participants will have no new complaints during program participation.	• We track attendance and performance online • quarterly surveys to referred student • quarterly surveys to referral source • Information from JCPC tracking database • Central to our ability to evaluate our program's success is collaboration with counselors from referring agencies including Orange County Juvenile Court counselors. • We already have a system in place for tracking measurable goals and objectives for the juvenile delinquency prevention grant-making bodies to which we already have to answer.
80% Participants successfully/satisfactorily completing the program will have no new	Same as above	80% Participants successfully/satisfactorily completing the program will have no new complaints in the 12 months following completion.	• We track attendance and performance online • quarterly surveys to referred student

complaints in the 12 months following completion.			• quarterly surveys to referral source • Information from JCPC tracking database • Central to our ability to evaluate our program's success is collaboration with counselors from referring agencies including Orange County Juvenile Court counselors. • We already have a system in place for tracking measurable goals and objectives for the juvenile delinquency prevention grant-making bodies to which we already have to answer.
80% Participants completing the program will demonstrate a reduction in problem behaviors for which they were referred by termination.	Same as above	80% Participants completing the program will demonstrate a reduction in problem behaviors for which they were referred by termination.	• We track attendance and performance online • quarterly surveys to referred student • quarterly surveys to referral source • Information from JCPC tracking database • Central to our ability to evaluate our program's success is collaboration with counselors from referring agencies including Orange County Juvenile Court counselors. • We already have a system in place for tracking measurable goals and

			objectives for the juvenile delinquency prevention grant-making bodies to which we already have to answer.
80% of children admitted will participate in a promotion test at the end of their term(s) and will receive the validation of new belt color/promotion.	Same as above	80% of children admitted will participate in a promotion test at the end of their term(s) and will receive the validation of new belt color/promotion.	• We track attendance and performance online • quarterly surveys to referred student • quarterly surveys to referral source
80% Participants completing the program will demonstrate improvement in targeted skills as specified in the individual service plan by termination.	Same as above	80% Participants completing the program will demonstrate improvement in targeted skills as specified in the individual service plan by termination.	• We track attendance and performance online • quarterly surveys to referred student • quarterly surveys to referral source • Information from JCPC tracking database • Central to our ability to evaluate our program's success is collaboration with counselors from referring agencies including Orange County Juvenile Court counselors. • We already have a system in place for tracking measurable goals and objectives for the juvenile delinquency prevention grant-making bodies to which we already have to answer.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: _____

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)	$ 2,000	$ 3,000	$ 5,000	67%
Local Government Grants:				
Orange County	$ -	$ 2,000	$ 3,000	50%
Town of Chapel Hill	$ 2,000	$ 2,000	$ 3,000	50%
Town of Carrboro	$ 2,000	$ 2,000	$ 3,000	50%
Other Local: Orange County match for JCPC	$ 5,466	$ 3,600	$ 3,600	0%
Other Local: OC JCPC Grant	$ 18,222	$ 19,000	$ 19,000	0%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
Wells Fargo	$ 1,000	$ 4,000	$ 5,000	25%
Strowd Roses	$ -	$ 10,000	$ 5,000	-50%
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 30,688**	**$ 45,600**	**$ 46,600**	**2%**
PROGRAM EXPENSES				
Compensation	$ 18,000	$ 23,000	$ 24,000	4%
Rent & Utilities	$ 12,000	$ 21,000	$ 21,000	0%
Supplies & Equipment	$ 688	$ 1,600	$ 1,600	0%
Travel & Training				0
Other Expenses:				0
Please list 3 largest "Other Expenses":				

	$				
	$ -				
	$ -				
Total Program Expenses		$ 30,688	$ 45,600	$ 46,600	2%
SURPLUS/(DEFICIT) FOR PERIOD:		$ -	$ -	$ -	0

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service+:

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	40	23	$30,688	$1334.00
Estimated FY14-15	30	30	$45,600	$1520.00
Projected FY15-16	35	35	$46,600	$1331.00

Defining a Unit of Service+

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost++

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	11	12	15	Durham City			
Female	12	18	20	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	5	3	8	Wake County			
Caucasian	10	15	15	Town of Chapel Hill	11	13	15
Hispanic	3	5	8	Town of Carrboro	8	10	12
Other: Asian	5	7	4	Orange County	4	7	8
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years	23	30	35	Per cent of clients at, or below, federal poverty level	100%	100%	100%
19-50 Years							
51+ Years							
Unknown				***TOTAL # OF CLIENTS SERVED***	23	30	35

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: _____

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations		$ 6,400	$ 6,400	0%
Agency Generated Revenue (fees)	$ 36,500	$ 49,000	$ 65,000	33%
Local Government Grants:				
Orange County	$ -	$ 2,000	$ 3,000	50%
Town of Chapel Hill	$ 2,000	$ 2,000	$ 3,000	50%
Town of Carrboro	$ 2,000	$ 2,000	$ 3,000	50%
Other Local: OC JCPC	$ 18,222	$ 19,000	$ 19,000	0%
Other Local: DC JCPC	$ 12,000	$ -	$ -	0
Other Local: Orange Co. match for JCPC		$ 3,600	$ 3,600	0%
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
NC DPS Level II	$ 45,000	$ -	$ -	0
Wells Fargo	$ 1,000	$ 4,000	$ 5,000	25%
Duke Giving	$ 4,000	$ 4,000	$ -	-100%
Other Grants: Strowd Roses		$ 10,000	$ 5,000	-50%
Other Grants:		$ -	$ -	0
Miscellaneous/Other Revenue	$ 10,000	$ -	$ -	0
Please list 3 largest Miscellanous sources:				
Total Agency Revenue	**$ 130,722**	**$ 102,000**	**$ 113,000**	**11%**
AGENCY EXPENSES				
Compensation	$ 55,000	$ 33,000	$ 37,600	14%
Rent & Utilities	$ 42,000	$ 39,000	$ 39,000	0%
Supplies & Equipment	$ 6,222	$ 4,000	$ 4,700	18%
Travel & Training	$ 3,500	$ 2,000	$ 2,700	35%
Other Expenses:	$ 24,000	$ 24,000	$ 29,000	21%
Please list 3 largest "Other Expenses":				

SHCU Loan Repayment	$ 24,000.00				
Misc	$ 5,000.00				
	$ -				
Total Agency Expenses		**$ 130,722**	**$ 102,000**	**$ 113,000**	**11%**
SURPLUS/(DEFICIT) FOR PERIOD:		**$ -**	**$ -**	**$ -**	**0**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1.00		$55,000	$33,000	$37,600	33%	
Half-time Instructor	.50		15,000	N/A	N/A	0	
Quarter-time Instructor	.25		7,000	N/A	N/A	N/A	
Quarter-time LCSW	.25		12,000	NA	N/A	N/A	
Volunteer Administrator 1	.50		20/week	20/week	20/week	N/A	
Volunteer Instructor 1	.05		2/week	2/week	2/week	N/A	
Volunteer Instructor 2	.05		2/week	2/week	2/week	N/A	
Volunteer Instructor 3	.05		2/week	2/week	2/week	N/A	
VOLUNTEER HOURS			26/week	26/week	26/week	N/A	

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Marian Cheek Jackson Center for Saving and Making History

Street Address: 512 W Rosemary Street, Chapel Hill NC, 27516

Mailing Address: 512 W Rosemary Street, Chapel Hill NC, 27516

Website Address: www.jacksoncenter.info

Executive Director: Della Pollock

Telephone: 919-357-5391 E-Mail: della@jacksoncenter.info

Contact Person: Manju Rajendran

Telephone: 919-618-0442 E-Mail: manju@jacksoncenter.info

Fax: _____ Federal ID Number: 46-1988511

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$ 6,000	$ 10,000
Funds will be used to support our **Youth Leadership, Education, and Civic Media** program. We will: • Expand 'Learning Across Generations' and 'History is Dangerous', our kindergarten through 12th grade civil rights history curriculum, designed in collaboration with local schools and neighborhood leaders to meet or exceed state standards. • Strengthen Fusion Youth Radio, an award-winning program uniting teens from across Chapel Hill-Carrboro-Orange schools, coaching youth in how to do audio production and radio journalism. • Launch our new online oral history trust, making it possible for the rich civil rights history of our area, and the unique character of Northside, Pine Knolls, Windy Hill, Tin Top, and Lloyd-Broad neighborhoods, to become part of the broader public consciousness. We will continue to host soundwalks and participatory tours, facilitate workshops, and preserve oral histories of long-time residents, to ensure that the lessons of the past can help bring us to a brighter future. • Sustain and grow the Northside News, the neighborhood broadside, sharing essential information and reflections among residents, small businesses, and organizations in the community.		
Town of Chapel Hill	$ 1,000	$ 7,000
Funds will be used to support our **Youth Leadership, Education, and Civic Media** program. We will: • Expand 'Learning Across Generations' and 'History is Dangerous', our kindergarten		

through 12th grade civil rights history curriculum, designed in collaboration with local schools and neighborhood leaders to meet or exceed state standards.

- Strengthen Fusion Youth Radio, an award-winning program uniting teens from across Chapel Hill-Carrboro-Orange schools, coaching youth in how to do audio production and radio journalism.
- Launch our new online oral history trust, making it possible for the rich civil rights history of our area, and the unique character of Northside, Pine Knolls, Windy Hill, Tin Top, and Lloyd-Broad neighborhoods, to become part of the broader public consciousness. We will continue to preserve oral histories of long-time residents, ensuring that the lessons of the past can help bring us to a brighter future.
- Sustain and grow the Northside News, the neighborhood broadside, sharing essential information and reflections among residents, small businesses, and organizations in the community.

Town of Carrboro	$ 750	$ 3,500

Funds will be used to support our **Youth Leadership, Education, and Civic Media** program. We will:

- Expand 'Learning Across Generations' and 'History is Dangerous', our kindergarten through 12th grade civil rights history curriculum, designed in collaboration with local schools and neighborhood leaders to meet or exceed state standards.
- Strengthen Fusion Youth Radio, an award-winning program uniting teens from across Chapel Hill-Carrboro-Orange schools, coaching youth in how to do audio production and radio journalism.
- Launch our new online oral history trust, making it possible for the rich civil rights history of our area, and the unique character of Northside, Pine Knolls, Windy Hill, Tin Top, and Lloyd-Broad neighborhoods, to become part of the broader public consciousness. We will continue to preserve oral histories of long-time residents, ensuring that the lessons of the past can help bring us to a brighter future.
- Sustain and grow the Northside News, the neighborhood broadside, sharing essential information and reflections among residents, small businesses, and organizations in the community.

_____	_____
Executive Director	Board Chair
_____	_____
Date	Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: March 28, 2012

   b. Years in Operation: 6 Years (operated under fiscal sponsorship of St. Joseph CME Church before our incorporation)

   c. Mission or Vision Statement (if applicable): The mission of the Jackson Center is to advance the vitality, diversity, and historical integrity of neighborhoods struggling with displacement.

   d. Brief History of Agency:
   The Jackson Center was established in 2008 to respond to rapid demographic changes in the Northside, Pine Knolls, Tin Top, and neighboring, historically African-American low-wealth communities in Orange County, NC. These communities have been especially hard hit by the economic recession, increased cost of living, and market pressures to fulfill the demand for rental housing for UNC-Chapel Hill students, resulting in diminishing numbers of low-income and racially and ethnically diverse populations. We were founded as a history activism center- a community-based hub that brings history into active neighborhood dialogue in order to make history and change together. Our efforts have always intentionally engaged difference directly and crossed all preconceived boundaries of division [across race, class, religion, sexuality, university-neighborhood (historically segregated "service" communities)] with a sustained commitment to social justice and community-led development. Our work is rooted in oral history listening and is realized along three primary lines of creative community development: organizing and advocacy for livable neighborhoods; youth leadership, education, and civic media initiatives; and celebration and connection through community renewal events and forums.

   This month, the Jackson Center was honored to receive the Dr. Martin Luther King Jr. Bridge Builders Award from the University of North Carolina Chapel Hill. The Jackson Center has been recognized with several awards for its work over the last six years: an Indy Citizen Award for our coalition building and work assisting in the implementation of the Northside/Pine Knolls Community Plan; the Advocacy Award from Preservation Chapel Hill for our historical education work in Chapel Hill/Carrboro; an award from the Chapel Hill chapter of a black sorority, and an award from UNC's Office of Engaged Scholarship for our neighborhood partnership work. Our Fusion Youth Radio program served as the inspiration for WUNC's Youth Radio Institute and several of our youth pieces have won national awards. Our events and forums have been hailed by civil rights and social justice activists as "the most genuinely integrated events" they have ever attended.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Overall, the four projects of our Youth Leadership, Education, and Civic Media program-- our nationally-recognized youth radio program (Fusion Youth Radio), our hand-delivered community newspaper (Northside News), our intergenerational civil rights curriculum and workshops (History is Dangerous and Learning Across Generations), and our oral history project (Oral History Trust, now with over 200 oral histories) aim to address the need for:

1) Creative engagement and civic participation across race, class, and age

2) Support for emerging youth leadership and renewed community vitality

3) Safe spaces and communication forums that honor cultural practices, explore difference, and connect diverse residents with leadership opportunities

4) The preservation and education of our civil rights history by engaging and empowering older residents in the telling and younger people in the listening

5) A civil rights curriculum that empowers and engages youth (especially youth of color and low-income youth) and connects them directly with older mentors

Our civic projects address these more documented and specific issues as well:

1) *Minority student empowerment and the achievement gap in our local and county schools:* Our piloted in-depth school partnership with Northside Elementary for our civil rights workshops has been represented by the school system as a model school-community partnership to address minority student empowerment and the achievement gap. Fusion Youth Radio also addresses this on smaller, more intensive scale, by providing mentorship (1:2 ratio of mentors to students) and training several sessions a week and working with an incredible diversity of students to empower their voices collectively.

2) *The sharply declining African American population in the towns (less than 10%) and county (12%), and the increasing struggle to retain African-American families (cut in half to 25% in the neighborhoods with the highest black population—Northside, Pine Knolls, Tin Top, Lloyd/Broad):* One of the most important ways to retain residents is for residents to be valued for their history, to have a stake in a community's future, and to improve the quality of life in our neighborhoods. Our oral histories honor, preserve, and enact the invaluable civil rights history of Orange County. Our civil rights workshops connect older community members to generations of young people in the schools. Our Northside News connects our most diverse neighborhoods with important local and state issues by utilizing the strength of community voices in creative ways. Our Fusion Youth Radio cultivates the power of youth voices and gives them a stake in our community's future.

3) *The declining quality of life for residents who live in neighborhoods with high UNC student populations:* Every component of this program intentionally engages UNC students as learners by conducting oral histories, distributing Northside News, or mentoring youth. We have seen this partnership and education with UNC students greatly improve quality of life for long-term residents (students no longer see themselves in a bubble).

4) *The lack of in-depth local civil rights curriculum in our Chapel Hill/Carrboro and Orange County schools, especially curriculum which honors families that still have generations of youth in these schools.* In our pilot work with Smith Middle and Northside Elementary last year, it became clear that our local schools do not have the curriculum or the resources to educate students about local civil rights and oral history work, especially curriculum that involves the voices of those who still have families in the school. Our workshops engage hundreds of local voices through curriculum and dozens more directly through our collaborative model of education.

5) *The lack of forums for aging seniors to be involved and active in ways that honor their dignity and contribute to our community's future:* So often, we try to find ways to keep senior citizens active and engaged, but we have few forums that really involve our senior citizens in historical education and leadership in envisioning our community's future. Our Youth Leadership, Education and Civic Media Program is based around the notion that our history is one of the most valuable tools, and we intensively involve elder through oral histories, connection to schools, and the ongoing forums in the Northside News.

3) Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Our primary goal in Youth Leadership, Education, and Civic Media Program for the coming year is to **increase capacity in staffing and resources** so we can **widen our reach to meet growing interest and demand** (more teens expressing desire to join Fusion Youth Radio, more schools seeking educational partnerships with the Jackson Center, more interest in oral histories and neighborhood soundwalk tours, and more neighborhood civic engagement from longtime residents as well as students and new tenants). We seek to **deepen the quality of our existing work** by upgrading equipment, improving our tracking and evaluative mechanisms, and investing in training and increasing staff time. We will need increased funding to make these necessary expansions possible.

1) In the coming year, our greatest financial need with regards to Youth Leadership, Education, and Civic Media is in staffing to meet the growing demand for our services, and ensure that we can train, track, and expand effectively.
2) We need to upgrade equipment for Fusion Youth Radio to create higher quality pieces and more effectively teach teen participants skills that they can use towards future employment.
3) Last year we moved to our own space, from a room in St. Joseph's CME Church to a larger space next door. The freestanding center at 512 Rosemary Street has allowed us to grow our programs and provide welcoming spaces for people of all ages, but it has

also meant a significant increase in operations cost and we continue to need support to sustain the space.

4) We continue to pay significant costs for printing and ink for 1500 copies of the Northside News per month. Last year, we lost our printing sponsor because of their financial hardship; we are now having to print at cost.
5) We would like to be able to provide stipends for our Fusion Youth Radio mentors who provide critical support for our intensive youth radio and leadership program.

This year, we were largely able to sustain all of the Youth Leadership, Education, and Civic Media work but unable to expand it because of the limits of our funding. Increasing our funding would help us expand our reach significantly.

4. Outline anticipated internal or external revenue sources for the program. Indicate whether these are ongoing or new sources.

Internal sources: We continue to have a steady flow of individual monetary donations but our strongest contributions continue to be in-kind donations of essential services, tools, space, and volunteer staff time.

External sources: We are currently operating with small grants from Mary Duke Biddle Foundation and Strowd Roses Foundation, both of which we hope to re-apply for. We now have a new Development Director who will be following up with more foundations. We have developed a contract funding structure for school workshops and the schools are paying half the cost of the educational programs in the classroom.

This year, the human services funding has been absolutely critical as it has provided program staff funding that is hard to sustain even with all of these efforts in the pipeline.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded (if possible, please bullet list):

Fusion Youth Radio:

- Our radio program is produced in partnership with Sacrificial Poets[1] and WXYC-Chapel Hill (89.3 FM). Sacrificial Poets provides key mentors and connects us with poets for nearly every episode, and WXYC hosts the live broadcast and donates critical technical support we could not otherwise access.
- We have developed partnerships with every school in Chapel Hill-Carrboro City Schools for recruitment and youth media workshops and are working to expand these partnerships to Orange County schools as well.
- Our staff partnered with WUNC the last two summer to create a Youth Summer Radio Institute, which featured works by two alumni of our program and

[1] Sacrificial Poets is a spoken word poetry organization that serves middle, high school, and college-aged youth in the Triangle Area of North Carolina. The organization facilitates writing and performance workshops throughout the state and hosts regular youth poetry events. In addition, Sacrificial Poets selects a team of six youth every year to take to the Brave New Voices International Youth Poetry Slam Festival (as seen on HBO)."

enabled these youth to have their stories reach over 80,000 listeners throughout the state on Morning Edition.

- We consistently partner with the Beatmaking Lab and Sacrificial Poets to exchange critical media, poetry, and beat-making workshops for youth served by our united organizations.

Northside News:

- Our community newspaper features a variety of content including but not limited to: important announcements from the Towns of Chapel Hill and Carrboro; details about Orange County tax policies and tax relief programs; publicity for forums hosted by the NAACP and EmPOWERment, Inc.; information about affordable housing programs from Habitat for Humanity and the Community HomeTrust; and advertisements for youth programs at Hargraves Community Center.
- Our consistency, our community focus, and our trusted relationships often result in immediate feedback. For example, we recently published an article about a minor rehab program we helped develop with Habitat for Humanity and the Town of Chapel Hill. This announcement was distributed to every house in the qualifying area through the Northside News. Within a week, we had enough applicants to fill the program and we have more inquiries from residents flooding in every day.
- We recently developed a connection with the Carolina Community Media Project at UNC. Professors and students from the School of Journalism and Mass Communication will support efforts to strengthen our content and create community workshops.
- We have various Northside News distribution partners, including all of the businesses in the historic Midway District, the Chapel Hill Downtown Partnership, four historic African-American churches in our area, and the Lincoln High Alumni Association, all of which increase our reach far beyond neighborhood boundaries.

Oral History Trust:

- The Southern Oral History Program and Wilson Library at UNC provide critical partnership for the development and accessibility of our archives.
- We have worked with four area African American churches intimately involved in civil rights action for interview connections.
- We partner with NC Central's public history classes and UNC's anthropology classes to help us process our interviews.
- Bonner Scholar interns from the Campus Y at UNC provide a critical role in developing archival systems, conducting interviews, and overseeing volunteers.

Civil Rights Workshops ('Learning Across Generations' and 'History is Dangerous'):

- We partnered with four schools this year to create in depth workshops and tours for every grade K-12. We have been especially close partners with the Chapel Hill/Carrboro School System, especially Northside Elementary School.
- We involve APPLES service learning students as support for the development of this curriculum.

- We work with Preservation Chapel Hill on tours connecting the workshops to geographic space.
- We have begun to partner with Lincoln High Alumni Association to involve more alumni in the ongoing education work.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

The success of our Youth Leadership, Education and Civic Media Program has always hinged on leadership from across various ethnic and minority groups. It is designed to serve and engage people across multiple generations and racial and socioeconomic backgrounds.

Fusion Youth Radio is committed to supporting diverse leadership across race, religion, gender, and sexuality; this year, the program is 75% people of color and 60% low income. Our youth radio program has a track record of reaching across barriers, not just in the group's composition but also in the selection of show themes. Past radio broadcasts have focused on topics such as immigration legislation, LGBT rights, race in local schools, feminism, mental and physical health, and democratic participation.

Our community newspaper seeks to act as a vector for voices in the community, and is hand-delivered to every household in four neighborhoods in order to ensure it reaches residents who are not digitally connected. We publish rotating columns featuring local artists and segments from oral history interviews, and every Northside News includes archive trivia for the lifetime community members and a column from lifelong resident, Keith Edwards. The "Ask Keith!" column utilizes the network and knowledge of a prominent community leader to answer neighbors' questions on topics ranging from housing to small business assistance or guidance for youth programs.

Our civil rights education workshops were created from over 200+ area oral histories, primarily with African-American residents, and engage these elder residents in their implementation. We are in our second year working with diverse students at Northside Elementary School and we celebrate this partnership as an incredible success. We have so far involved over thirty elder residents in its implementation this past year and have reached over 800 students through our oral history-rooted civil rights workshops.

Please view our video 'Beliefs Like Glue' (available here: https://www.youtube.com/watch?v=VA51oDH8Irs&feature=youtu.be), a glimpse into the freedom dreams of fourth graders, as a fine example of the significant learning and visioning made possible through our unique model of multicultural intergenerational education work.

We are proud to note that we have noticed a trend reversal in the loss of homes in the Northside Neighborhood to investors as a result of our civic engagement and organizing efforts, retaining and drawing in new families of color and low-income families. In the spirit of propagating the tools that are working, we are delighted to report that an organization in Efland, NC and our friends in Rogers-Eubanks neighborhood have developed community broadsides modeled after our much-loved Northside News.

In the coming year we will continue to increase targeted recruitment for Fusion Youth Radio and school partnerships for our workshops reaching across all boundaries and serving youth from all backgrounds.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X	X	X
Health and Nutrition				
Job Training	X			
Sports and Arts Activities	X		X	
Pre-School Activities				
After-School Activities	X			
Mentoring	X			
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
1) Deepen and widen our distribution and involvement networks throughout communities of change in Orange County	-Distributed Northside News to 750 neighborhood residents, Midway businesses, organizations each month -Increased our Fusion Youth Radio program reach by partnering with local schools and publicizing the monthly live show -Sustained a precinct advocacy system of neighborhood block leaders of different ages to improve communication within and between different areas of the neighborhood	1435 residents of Orange County, Chapel Hill and Carrboro reached	-Mapped and tracked all households receiving Northside News -Kept records for Fusion Youth Radio participants and visitors to our online host radio site -Tracked through Insightly database to track precinct calls and referrals that covered every household in Northside and Pine Knolls and beyond
2) Improve the connection between media reach and participation in community action	-Engaged a dozen youth as hosts and reporters for Fusion Youth Radio and another 15 as regular contributors. -Involved dozens of residents as contributors to Northside News -Conducted a dozen oral histories to add to the oral history collection and engaged elder residents. - Hosted two major civil rights forums, organized with community leaders and involving young people and elders	605 participants engaged	-Tracked involvement, documentary pieces, and script writing for youth in FYR -Tracked resident contributions to Northside News - Kept database record of precinct captain involvement and advocacy efforts
3) Mobilize additional resources and expertise through collaboration with University, Town, and non-profit agency partners	- Connected residents with partner agencies - Sustained new collaborations - Enabled in-kind funds for efforts from UNC and partner agencies	-Collaborated with 23 partner agencies for various services -$34,500 in-kind funds mobilized	-Tracking completion, pilot runs, and use of documentary initiatives. Published on website and had media release.
4) Cultivate, develop, and sustain leadership from within the community	-Fusion Youth Radio works intensively with high school students (2 sessions per week, plus a monthly radio show)	-51 community leaders developed -Northside precinct captains continue to be active advocates	-Performed surveys for Fusion Youth Radio participants to track civic engagement and media

	throughout the year, tracking increased civic engagement and leadership, improving script writing, interviewing, performing, and poetry skills (10 leaders) -Northside News engaged many new regular contributors and editors from the neighborhoods -Our precinct captains developed into neighborhood advocates through weekly sessions and community meetings	for their blocks and have been able to help us connect residents to home repairs, youth to area support programs, and families in need to social support organizations.	skills - Tracked precinct leadership and had 12 neighbors previously uninvolved leading major aspects of our civic media initiative.
5) Educate ourselves and all civic media participants on means, visions, and challenges of social change	-Hosted educational events and forums -Partnered with schools for educational initiatives	9 educational events/ forums were held and robustly attended 4 school partnerships developed, over 800 additional students reached 240 people, mostly students, utilized the Histories of Home Neighborhood Soundwalk and participated in full neighborhood orientations.	-Gathered attendance records and contact information for all event attendees -Conducted assessments with students and teachers to evaluate our performance -Tracked participation in soundwalks and tours

If program(s) did not meet its stated goal(s), please explain:

B. FY 2015-16 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Civic Media Outreach Increase media and education reach to **over 2200 town and county residents** through intensive communication, youth development programming, and civil rights workshops—especially increasing reach to county schools, low-income youth, and senior citizens throughout the towns. This meaningfully engaging outreach will lead to increased civic participation and action.	- Revamp our community newspaper to connect communities across the county undergoing similar challenges and expand circulation to 800 residents across at least four neighborhoods (800 by hand, hundreds more online). - Partner with several new schools in the towns and County and sustain current partnership with Northside Elementary and Smith Middle for our civil rights workshops (at least 600 students). Involve senior citizens in each classroom partnership (24) -Make at least 50 of our over 200 oral histories accessible on-site and online.	Out of 2200 residents reached, we will involve 2000 diverse residents in intergenerational education efforts, civic participation, and community action	- Media distribution and website tracking each month allows us to monitor overall reach - Our new database will be used to track involvement and engagement by project, linked to number of households -Our civil rights curriculum through school partnerships is tracked through final project completion and school surveys
Fusion Youth Radio Measurably increase youth empowerment (especially youth of color) and engagement in classrooms, as well as connecting them with elder mentors and solid skill-based trainings in history, media, and writing.	- Improve Fusion Youth Radio trainings and curriculum by starting a professional mentor network that will assist in skills and issue-based trainings - Fusion Youth Radio will work intensively with high school students (3 sessions per week) throughout the year, tracking increased civic engagement and leadership, improving script writing, interviewing, performing, and poetry skills. -Increase outreach and recruitment of Fusion Youth Radio to involve even more diverse youth from across the county. -Improve our online forums for Fusion Youth Radio in order to track listenership.	-75% of Fusion Youth Radio participants will show measurable increase of civic media skills and confidence in their voices -15 youth with strong audio production skills, radio journalism job training, increased confidence and social justice consciousness along with deeper belief in the power of their own voices.	-Intake and exit surveys around civic participation, confidence, and media literacy skills; we are also working with the school system to develop writing skills measurements through Common Core -Exit interviews with partner teachers one month after workshops to track qualitative outcomes

	-		
Education Deepen civil rights curriculum, sustain a 3rd year of support for schools reached already, and provide full support and resources for school teachers and staff to sustain education work beyond our workshops	- Partner with Wilson Library, various historic societies, and Orange County Human Resources office to review and improve our civil rights curriculum for Orange County schools. -Develop a second-year curriculum for k-5 to build upon our first year partnership with Chapel Hill/Carrboro schools. Partner with at least two new schools for the first year curriculum -Develop a resource packet for teachers and staff to enable sustained follow-up to our workshops -Utilize our community-based public history taskforce to review and monitor all progress - Involve local elder citizens of color in all aspects of our civil rights workshops, especially connecting local leaders with schools with familial or historic connection	- Complete Orange County civil rights curriculum and partner with a pilot school to reach at least 300 students - In close coordination with partner school, complete a 2nd year of vertical curriculum for local civil rights and oral history with positive reviews and educational outcomes - School partners will report in exit surveys a marked increase in support from the resource handbooks. -24 senior citizens will be engaged actively in our education efforts as school mentors, and teachers will report an improvement in school engagement from youth of color	- Pilot curriculum will be tested and reviewed with various partners and ultimately, with a school partner in each school system - A teacher and staff working group and our Public History Task Force will monitor the development of the resource guide.
Oral History and Neighborhood Preservation Engage 30 unreached senior citizens in their histories and role in educating future generations, Finish processing 15 new oral histories	- Develop a neighborhood tour team in Northside to participate in all workshop tours that are carried out - Partner with Lincoln High Alumni Association, the Senior Center, and RENA to reach new partners connected to the civil rights struggle -Conduct an additional dozen interviews, connecting aging resident leaders with student learners.	-Out of 30 reached, at least 20 will report quality of life improvement as a result of various education and history efforts.	-Quality of life interviews will be conducted with elder leaders who are involved in our various efforts -Interviews will be processed and included as part of the Jackson Center Oral History Trust

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **The Marian Cheek Jackson Center for Saving and Making History**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 9,098	$ 6,000	$ 9,000	50%
Program Generated Revenue (fees)	$ 2,050	$ 11,000	$ 15,000	36%
Local Government Grants:				
Orange County	$ 4,500	$ 6,000	$ 10,000	67%
Town of Chapel Hill	$ 1,000	$ 1,000	$ 7,000	600%
Town of Carrboro	$ 750	$ 750	$ 3,500	367%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Strowd Roses	$ 7,500	$ 7,500		-100%
Other Grants: Mary Duke Biddle and Youth Fo	$ 9,000	$ 5,000	$ 15,000	200%
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 33,898**	**$ 37,250**	**$ 59,500**	**60%**
PROGRAM EXPENSES				
Compensation	$ 31,100	$ 34,362	$ 45,300	32%
Rent & Utilities	$ 4,733	$ 5,383	$ 7,000	30%
Supplies & Equipment	$ 876	$ 1,500	$ 4,500	200%
Travel & Training	$ -	$ 100	$ 200	100%
Other Expenses:	$ 236	$ 2,000	$ 2,500	25%
Please list 3 largest "Other Expenses":				
Printing and Copying $ -				
$ -				
$ -				

Total Program Expenses	**$ 36,945**	**$ 43,345**	**$ 59,500**	**37%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (3,047)**	**$ (6,095)**	**$ -**	**100%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: One Orange County, Chapel Hill, or Carrboro resident, of any age, successfully engaged in intergenerational community action (a Fusion Youth Radio host or producer; a neighborhood writer or distribution partner for Northside News; a participant in a civil rights workshop or forum; an elder oral history interviewee or young interviewer)

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	1435	950	$36,945	$38.88
Estimated FY14-15	1800	1300	$39,545	$30.42
Projected FY15-16	2200	2000	$59,500	$29.75

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	~525			Durham City			
Female	~910			Durham County			
2. **Ethnicity**				Raleigh City			
African-American	~650			Wake County			
Caucasian	~590			Town of Chapel Hill	~1085		
Hispanic	~70			Town of Carrboro	~250		
Other	~50			Orange County	~100		
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years				Per cent of clients at, or below, federal poverty level			
19-50 Years							
51+ Years							
Unknown				***TOTAL # OF CLIENTS SERVED***			

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **The Marian Cheek Jackson Center for Saving and Making History**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 28,692	$ 25,000	$ 25,000	0%
Agency Generated Revenue (fees)	$ 8,650	$ 63,250	$ 90,000	42%
Local Government Grants:				
Orange County	$ 4,500	$ 6,000	$ 10,000	67%
Town of Chapel Hill	$ 1,000	$ 1,000	$ 7,000	600%
Town of Carrboro	$ 750	$ 750	$ 3,500	367%
Other Local: ToCH Affordable Housing Fund	$ 35,000	$ 40,000	$ 40,000	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: 7 small grants	$ 26,400	$ 45,000	$ 50,000	11%
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 104,992**	**$ 181,000**	**$ 225,500**	**25%**
AGENCY EXPENSES				
Compensation	$ 97,452	$ 113,850	$ 150,000	32%
Rent & Utilities	$ 14,221	$ 16,150	$ 18,000	11%
Supplies & Equipment	$ 3,141	$ 11,750	$ 15,000	28%
Travel & Training	$ -	$ 1,500	$ 2,500	67%
Other Expenses:	$ 1,936	$ 37,750	$ 40,000	6%
Please list 3 largest "Other Expenses":				
Contract Services				
Insurance, Postage, Misc.				
Addition to safety reserves $ -				
Total Agency Expenses	**$ 116,749**	**$ 181,000**	**$ 225,500**	**25%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (11,757)**	**$ -**	**$ -**	**0**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: The Marian Cheek Jackson Center for Saving and Making History

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Programs and Communications Director	1.0	10%	$33,634	$33,000	$35,000	16%	
Development and Operations Director	1.0	25%	$24,216	$30,000	$35,000	16%	
Administrative Associate and Events/Education Manager	0.4	25%	(did not exist)	$7,500	$17,700 (will be .6)	8%	
Assistant Director of Programs and Communications (focused on Youth Leadership and Education work)	0.6	100%	$15,660	$15,000	$30,000 (will be full time)	13%	
AmeriCorps Members	2.0	50%	$9,500	$5,000	$9,500	4%	(H) through VISTA program
Fusion Youth Radio Manager	0.25	100%	(did not exist)	$10,000	$10,000	4%	
Bonner Interns and Volunteers	3.0	50%	In-kind	In-kind	--		

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Mental Health America of the Triangle

Street Address: 3729 Murphy School Road, Durham, NC 27705

Mailing Address: P.O. Box 16246 Chapel Hill, NC 27516

Website Address: www.mhatriangle.org

Executive Director: Marci White, MSW

Telephone: 919-942-8083 (o); 919-616-7772(c) E-Mail: mwhite@mhatriangle.org

Contact Person: Marci White, MSW

Telephone: 919-942-8083 (o); 919-616-7772(c) E-Mail: mwhite@mhatriangle.org

Fax: 919-381-4490 Federal ID Number: 27-3194876

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$ 0	$ 21,500
Summary of intended use of funds (NEW - Program 4, *Compeer for Seniors*): MHAT's new *Compeer for Seniors* program will help reduce isolation and provide an increased sense of connection and community for Orange County seniors at risk for depression and isolation, based on Compeer's evidence-based model of developing one-on-one ongoing friendships (volunteers commit to at least 1 year) in which trust and intimacy occur over time. The *Compeer for Seniors* program will match identified/at-risk individuals with carefully selected volunteers who will engage their senior friend in activities of mutual interest to increase a sense of fulfillment in their own lives, and to inspire them to get out and engage within their community.		
Town of Chapel Hill	$ 5,500	$ 6,500
Summary of intended use of funds (Programs 1, 2 and 3): Funds applied to expenses associated with the Family Advocacy Network, Pro Bono Counseling Network, and Compeer for Chapel Hill residents.		
Town of Carrboro	$ 5,500	$ 6,500
Summary of intended use of funds (Programs 1, 2 and 3): Funds applied to expenses associated with the Family Advocacy Network, Pro Bono Counseling Network, and Compeer for Carrboro residents.		

Marci White, MSW 1/23/15 — Executive Director Date

D J Hopkins 1/23/15 — Board Chair Date

Revised November 20, 2014

Section I: Agency and Program Overview

1. **Please provide a brief history of the agency– including mission, date of incorporation and years of operation.**

a. Date of Incorporation:

Mental Health America of the Triangle (MHAT) was incorporated in North Carolina on 08/06/2010 and merged with the unincorporated nonprofit Mental Health Association of Orange County (MHAOC) started in 1966.

b. Years in Operation:

Through the merger of the Mental Health Association of Orange County and Mental Health America of the Triangle, the organization has been in operation in Orange County for 49 years.

c. Mission or Vision Statement (if applicable):

Mental Health America of the Triangle is an unwavering voice of hope and source of support, education, service and advocacy for those whose lives are touched by mental illness and/or substance abuse.

d. Brief History of Agency:

The Mental Health Association of Orange County (MHAOC) began serving the community in 1966 as an unincorporated nonprofit affiliate of the North Carolina Mental Health Association. The organization recognized and attempted to lessen the impact of mental illness on the individual, family, and the community through a number of community based programs. In 2010, the organization was incorporated in North Carolina in 2010 as Mental Health America of the Triangle (MHAT), secured nonprofit status with the IRS, and obtained a Charitable Solicitation License. MHAT is affiliated with the national organization, Mental Health America, but operates completely independently financially here in the local community.

Mental Health America of the Triangle's approach is comprehensive, targets high risk populations and those individuals and families who "fall through the cracks" - those without adequate health care coverage or resources to meet their mental health needs. MHAT provides support to individuals, families and children through three unique programs: the Family Advocacy Network, the Pro Bono Counseling Network, and Compeer. In addition to requesting funds from the Towns of Chapel Hill and Carrboro to sustain these three life-changing programs, MHAT also requests funding from Orange County to add the Compeer for Seniors program, to support the growing population of Orange County senior citizens who are at-risk for or experiencing depression or isolation.

MHAT's programs are innovative and extremely cost-effective, in that they harness the power of specially trained and dedicated volunteers to provide services to those at risk of "slipping through the cracks" or of receiving no treatment at all. MHAT's programs are administered by a small staff of incredibly dedicated, part time professionals. MHAT's

programs are preventive, proactive, health, solution-centered and wellness-oriented - all geared toward empowering individuals to take ownership of their own mental health and recovery so that they can be happier, more productive members of their families and community.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. **Describe the identified community need(s) the Program(s) funded will address.**

PROGRAM 1 - Family Advocacy Network (FAN) (Town of Chapel Hill and Carrboro):

Research shows that half of all lifetime cases of mental illness begin by age 14. Scientists are discovering that changes in the body leading to mental illness may start much earlier, before any symptoms appear. Through greater understanding and research into child brain development, we are learning more about the early stages of a wide range of mental illnesses that appear later in life. *Helping young children and their parents manage difficulties early in life may prevent the development of more serious mental disorders down the line.* Once mental illness develops, it becomes a regular part of a child's behavior and more difficult to treat. While significant advances have been made to better treat (though not yet cure) many disorders, the National Institute of Mental Health reports that many children with mental illnesses do not get treatment. Statistically, while approximately one in five children under the age of 18 live with a diagnosable mental health condition, between 50-75% of these children do not receive treatment.

According to the 2013 Orange County Census Report, there are an estimated 140,352 residents with 20.5% of the population being under age 18. This computes to be around 28,770 youth in the community and at the 1:5 national rate of mental illness, translates to about 5,754 residents under age 18 living in our community with a mental health condition. This means that somewhere between 2,500 and 3,800 youth under age 18 who live with a mental disorder are not receiving needed treatment services in Orange County.

Stigma around mental illness is a common factor among people who don't seek treatment. Parents, in particular, often don't want their child to be labeled. In some circumstances, families can't afford treatment services or treatment is otherwise inaccessible. Parents of these youth often do not understand mental illness and blame the child for making willful choices when, in fact, it is a brain disorder that causes the behaviors. The parents' non-acceptance of their child's disorders can create other problems within the family dynamic, and set the stage for divisions between parents and other siblings.

Some youth engage in negative behaviors that cause the court system to become involved in the family's life, e.g., stealing, truancy, fights at school. Likewise, mental illness can dramatically impact a young student's success in the public school system. Whether it's due to negative behaviors, or severe depression, anxiety or psychosis, parents and teachers struggle to help these children have a positive school experience. Despite our System of Care-driven treatment values, that strive to find effective local treatment services so a child can be served in their own community, many mentally ill youth experience hospitalizations

and out of home therapeutic treatment far away from their parents, other family members, friends and all that is familiar to them. All of these issues combined place extraordinary stress on parents, families and the community.

Through the Family Advocacy Network (FAN) program at Mental Health America of the Triangle (MHAT), trained staff FAN Advocates engage parents in case management-like services that include help in navigating multiple systems (juvenile court, school/special education, treatment services and community resources) while also providing opportunities for 1:1 and group support, specialized training through workshops and parent skills building classes to help improve outcomes for their youth with mental illness and for the entire family. When working 1:1 with parents, FAN Advocates spend at least 12 hours and up to 100 or more hours in providing case management-like services over the duration of several months. While some parents' needs are short-lived, lasting about 90-days, the average parent receives services for about six months and an occasional parent might need more than 12 months. The duration of service is individually based on the parents' and families' needs. In addition to the above, FAN Advocates provide consultation services to parents on a short-term basis by phone, email and/or 1:1 meetings ranging from 1 to 4 hours of service to help parents better identify needs, assist with navigation, provide support, coaching and/or connect them to resources.

FAN Advocates have personal, real-life experiences as parents of children with mental health conditions. FAN staff bring a wealth of knowledge from both experience and professional training when assisting other parents. Measured outcomes demonstrate that the children of parents who engage with MHAT-FAN have a reduced rate of recidivism with the juvenile justice system, improve their coping skills, experience fewer new complaints from parents and improve parent-child relationships.

The FAN Program began in 2000 and continues to grow each year. FAN services are essential to parents raising children with at-risk behaviors rooted in mental health conditions. Referrals come from a variety of resources, including the juvenile court system, the Department of Social Services, schools, treatment providers, churches, other community agencies, friends or family members who have previously utilized FAN services and self-referrals. The FAN program trains other parents as 'Parent Partners' who serve as volunteer mentors to other parents raising children with mental health issues. This outreach helps parents to develop natural supports in the community to sustain them beyond FAN involvement. Program outcomes demonstrate a continuing high level of improvement by parents in multiple areas, including parents able to meet the responsibilities and demands of parenting, increased knowledge of how to access services and successfully/appropriately resolving parent-child conflicts within the family.

PROGRAM 2 - Pro Bono Counseling Network (PBCN) (Town of Chapel Hill and Carrboro):

The Affordable Care Act has improved access to mental health services for many; however, since Medicaid was not expanded in NC, a large proportion of people remain uninsured without access to these services. The Kaiser Foundation estimates this population to be

357,000 in NC. Studies show that mental illness is significantly higher among the uninsured[1]. It is estimated that 182,000 uninsured adults in NC have a mental illness[2]. Untreated mental illness has many consequences, for individuals and for our larger community.

Current mental health service delivery in North Carolina is inadequate. In the wake of North Carolina's mental health reform and the country's economic downturn, many individuals who need mental health services are unable to access care because they either do not meet certain diagnostic criteria or are unable to get past established financial barriers. MHAT's Pro Bono Counseling Network (PBCN) has provided a critical service for uninsured/ underinsured Orange County residents, caught in the systemic gap between the adequately insured and the mentally ill who do not have other resources, to secure mental health services with a licensed mental health provider in the community.

The Pro Bono Counseling Network (PBCN) provides free mental health counseling services to individuals in need, despite their ability to pay, via a network of licensed, volunteer therapists. The PBCN fills a current and growing need within our community by providing free counseling to uninsured/underinsured individuals suffering from depression, anxiety, and various other mental health issues - up to 8 free sessions, often enough to get a person back on their feet. As the number of requests for services grows, MHAT has responded - by recruiting new volunteer therapists to meet the need. The volunteer network currently has 100 licensed mental health professionals serving clients in the Triangle. The dramatic increase in individuals seeking pro bono mental health services demonstrates the growing need for quality mental health care for uninsured and underinsured individuals within our community.

There are multi-systemic consequences to not accessing needed mental health services. When individuals experience obstacle after obstacle while trying to find much needed services, the situation can begin to feel hopeless and it is easy to give up the search. Mental illnesses can prevent a person from successfully engaging in daily activities, such as self care, school, work, and recreation. Further, when needed counseling services are not accessed or delayed, the functioning for some individuals may decline to the point of a crisis, increasing the financial burden to the health care system, the psychological costs to the individual and their families, and an overall negative impact on the community. It is also estimated that there are 150,000 ER visits in NC yearly for acute psychiatric or substance abuse crises, of which 13% return within 30 days.[3] These emergency department visits have gone up in NC. From 2008-2010, mental illness ER visits increased by 17.7% on a national level.[4] A $193.2 billion loss

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[1] Garfield R, Damico A, Stephens J, Rouhani, S. The Coverage Gap: Uninsured Poor Adults in States that Do Not Expand Medicaid – An Update. *The Henry J Kaiser Family Foundation: The Kaiser Commission on Medicaid and the Uninsured*. 2014:1–8. Available at: http://files.kff.org/attachment/the-coverage-gap-uninsured-poor-adults-in-states-that-do-not-expand-medicaid-issue-brief. Accessed December 5, 2014.

[2] Parity or Disparity: The State of Mental Health in America 2015. *Mental Health America*. 2014:1–54. Available at: http://www.mentalhealthamerica.net/sites/default/files/Parity%20or%20Disparity%202015%20Report.pdf.

[3] DHHS Announces Statewide Initiative to Improve Mental Health and Substance Abuse Crisis Services in North Carolina. 2013:1–8. Available at: http://www.ncdhhs.gov/pressrel/2013/2013-11-07_mhsas_initiative.htm.

[4] Emergency Department Visits by Patients with Mental Health Disorders — North Carolina, 2008–2010. *Centers for Disease Control and Prevention: Morbidity and Mortality Weekly Report*. 2013;62(23):469–472. Available at: http://www.cdc.gov/mmwr/preview/mmwrhtml/mm6223a4.htm?s_cid=mm6223a4_whttp://.

in earnings is due to severe mental illness annually; and nationally, 217 million days of productivity are lost due to mental illnesses.

Recruiting new volunteer therapists and maintaining the network of therapists is critical to meeting the increasing mental health needs of uninsured/underinsured individuals in our community. Since all therapists must obtain continuing education credits to maintain their licensure, the Pro Bono Counseling Network partners with Wake AHEC and offers the *Pro Bono Counseling Network Education Series.* The annual series provides a minimum of 6 clinical continuing education workshops on topics that are relevant to PBCN therapists and is completely free of charge for current volunteer therapists. The series is offered for a fee to all clinicians in the area and serves as a recruiting tool for new volunteer therapists while enhancing the clinical skills of area therapists.

During the past two years, the Program Coordinator for the Pro Bono Counseling Network has received increased requests from individuals who do not qualify for PBCN and do not know how to find or access needed mental health services. The Program Coordinator has consulted with and provided more than 100 individuals with referrals to appropriate mental health and supportive services, advocacy in navigating the system, and general information about resources. The increased amount of consultation and referral requests is the basis for MHAT's modest increase in the amount of funding (from $5,500 to $6,500) it is requesting from the Town of Chapel Hill and Carrboro.

PROGRAM 3 - Compeer for Adults with Severe and Persistent Mental Illness - (Town of Chapel Hill and Carrboro):

As established in prior sections, North Carolina has a large population of people with mental illness in need of services. Mental illness is often accompanied by feelings of isolation and decreased self-esteem that impacts the individual's ability to reach out to others for support. MHAT's Compeer program – in existence within Orange County since 1995 – addresses the stigma, isolation, and loneliness of mental illness through the power of friendship. Trained volunteers commit a minimum of one hour per week for 12 months to a Compeer "friend" who lives with a mental health condition, typically someone with severe and persistent mental illness (SPMI) such as Schizophrenia or Bipolar Disorder. The clients (friends) are stable and at the critical point in their recovery, in which they are re-establishing relationships and connections within the community.

Compeer is a successful, cost-effective, evidence-based national program. Survey data provided from the Compeer Inc. Annual Survey Report 2013 reveals that more than 91% of mental health professionals directly attribute improvements in their clients' mental health condition to their participation in the Compeer program. The simple support of a friend has been demonstrated to have a significant positive impact on those living with severe and persistent mental health conditions, resulting in better care outcomes, such as reduced number of psychiatric crises and hospitalizations, continued and invested participation in treatment, and improved overall well being in their lives. By leveraging the use of dedicated volunteers, Compeer cost effectively provides this supportive service to those in severe need.

Volunteers are carefully matched by the program coordinator according to gender, age, interests and compatibility. Meetings occur in natural settings and friends meet weekly to engage in regular activities (such as enjoying a walk together, meeting for coffee, playing

checkers or tennis, sharing a meal, exploring a library). The Compeer program is included in the National Registry of Evidenced-based Programs and Practices (NREPP), a program of SAMHSA (Substance Abuse and Mental Health Services Administration), and is recognized by the American Psychological Association as a best-practices model.

In the Triangle, MHAT's Compeer program continues to experience yearly growth in the number of volunteers and an increase in friends being referred for a Compeer volunteer. Funding currently supports a limited part-time program coordinator (12 hours). Need for program support surpasses current resources. At this writing, Compeer has 10 individuals waiting for a friend, and the list continues to grow. MHAT continues to seek funding to increase Compeer staff hours to more fully meet the needs of our community, so that proper recruitment, publicity, and volunteer training can take place.

PROGRAM 4 - *Compeer for Seniors* (Orange County – *New)*:

Mental Health America of the Triangle (MHAT) seeks $21,500 in funding from Orange County to develop the *Compeer for Seniors* program. Compeer is an evidence-based, national program. MHAT has operated a successful Compeer program for adults with severe and persistent mental illness since 1995. Based on the history and impact our current Compeer program has had on the lives of adults living with severe and persistent mental illness, MHAT seeks funding from Orange County to add *Compeer for Seniors* to its array of programs. *Compeer for Seniors* has a track record of proven effectiveness in other communities throughout the country in reducing isolation and increasing a sense of connection and community for seniors at risk for depression. To implement *Compeer for Seniors*, MHAT has been actively working to develop relationships within the Orange County Department of Aging, the senior center network, and other community/nonprofit organizations serving the elderly. There is no question that there is both interest as well as need. The concept of offering *Compeer for Seniors* within our local community has met with more than enthusiastic response.

This new program will address a well-documented community need. Here in Orange County, the number of adults age 65+ is estimated to increase by 31% between 2012 and 2017. By 2030, this population will more than double from its size in 2012, reaching an estimated 31,063 people and making up nearly 18% of all Orange County individuals compared to an approximate 11% currently.[5]

It is estimated that 20% of people age 55 years or older experience some type of mental health concern. The most common conditions include anxiety, dementia, severe cognitive impairment, and mood disorders such as depression or bipolar disorder.[6]

Mental health problems are under-identified by health-care professionals and older people themselves, and the stigma surrounding mental illness makes people reluctant to seek help. Multiple social, psychological, and biological factors determine the level of mental health of a person at any point of time. As well as the typical life stressors common to all people, many older adults lose their ability to live independently because of limited mobility, chronic pain, frailty or other mental or physical problems, and require some form of long-term care. In addition, older people are more likely to experience events such as bereavement, a drop in

[5] *2012-2017 Orange County Master Aging Plan, p. 10, Demographics: Older Adults in the U.S. and in N.C.*
[6] *American Association of Geriatric Psychiatry, Geriatrics and Mental Health-The Facts, 2008.*

socioeconomic status with retirement, or a disability. All of these factors can result in isolation, loss of independence, loneliness and psychological distress in older people.

Mental health has an impact on physical health and vice versa. For example, older adults with physical health conditions such as heart disease have higher rates of depression than those who are medically well. Conversely, untreated depression in an older person with heart disease can negatively affect the outcome of the physical disease.[7]

Depression is the most prevalent mental health problem among older adults. Depression is associated with distress and suffering and can lead to impairments in physical, mental, and social functioning. The presence of depressive disorders often adversely affects the course and complicates the treatment of other chronic diseases —a particular concern among older adults given the high prevalence of multiple chronic conditions in this age group. Older adults with depression also visit the doctor and emergency room more often, use more medication, incur higher outpatient charges, and stay longer in the hospital. Because depression is a highly treatable but currently undertreated condition among community-based older adults, all disease prevention programs for older adults should include a depression treatment component.[8]

Depression is one of the most successfully treated mental illnesses. There are highly effective treatments for depression in late life, and most depressed older adults can improve dramatically from treatment.[9] MHAT's new *Compeer for Seniors* program will be able to help reduce isolation and provide an increased sense of connection and community for Orange County seniors at risk for depression.

Orange County has identified comprehensive care of the growing population of senior citizens as a priority, since its initial Master Aging Plan (MAP) was developed in 2002. MAP outlines 8 key goals to serve as guiding principles in serving Orange County's older adult population, with specific objectives detailed within each goal area. **MHAT's *Compeer for Seniors* program will address several goals and objectives identified in Orange County's 5-year Master Aging Plan (MAP 2012-17), aimed at providing comprehensive and coordinated delivery of community services and supports that foster lifelong community engagement and wellbeing for older adults.**

MHAT's *Compeer for Seniors* program directly addresses MAP's Goal 3 - *to empower older adults to enjoy optimal health status and to have a healthy lifestyle* - and fulfills the specific objectives identified by the County as viable action steps for achieving this particular goal. MHAT's *Compeer for Seniors* program also directly supports MAP's Goal 5 - *to empower older adults to engage in the community through volunteerism, lifelong learning and civic activities.*

One of the ways that Orange County outlined achieving the objective to promote wellbeing and prevent/maintain chronic disease was "through increased access to evidence-based

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[7] *World Health Organization, Mental Health and Older Adults, Fact Sheet #381, September, 2013.*

[8] *Centers for Disease Control and Prevention and National Association of Chronic Disease Directors. The State of Mental Health and Aging in America; Issue Brief 2-Addressing Depression in Older Adults: Selected Evidence-Based Programs; 2009.*

[9] *Geriatric Mental Health Foundation, 2008.*

programs". As an evidence-based program, Compeer has proven success in helping alleviate the symptoms of depression and anxiety that often precede the onset of medical problems.

A vast body of evidence supports the physical benefits of a healthy social life. Conversely, loneliness and social isolation have been clearly linked to poor health outcomes. Definitive scholarly studies on the subject point to social isolation as leading to "numerous detrimental health effects in older adults, including increased risk for all-cause mortality, dementia, increased risk for re-hospitalization, and an increased number of falls." Social isolation among seniors is alarmingly common, and will continue to increase in prevalence as the older population grows.[10]

One of the primary strategies identified by the Orange County MAP (Strategy 3.1.2.) is to "train volunteers to offer evidence-based programs (like a Matter of Balance and Living Healthy, at senior centers, congregations, etc.)". While physical exercise and activity can have a remarkable effect, research and evidence have shown that emotional support and friendship also have a profound and positive effect upon seniors' quality of life. According to the second annual United States of Aging Survey, seniors are driven by a desire for connectedness. More than half of seniors (53%) nationally indicate that being close to friends and family is important. Also, seniors who report experiencing feelings of isolation and depression express less optimism regarding their future health and quality of life compared with seniors nationally. [11]

Further, according to the notable study *The State of Mental Health & Aging in America*[12], adults age 65+ were more likely to report that they "rarely" or "never" received the social and emotional support they needed than their slightly younger counterparts, adults aged 50-64 (12.2% compared to 8.1%, respectively).
Mental Health America of the Triangle's proposed *Compeer for Seniors* program is evidence-based and is modeled after the very successful *Compeer Partners for Seniors Program* of Buffalo, NY. The Compeer model works; evidence to support this from the Buffalo program includes:

- 88% of clients reporting improved participation in civic, cultural, religious and recreation activities.
- 98% of volunteers reporting they feel they improved the lives of the people they served.
- 95% of clients reporting they always or usually get the social and emotional support they need.

Our staff has worked closely with Buffalo to develop our local program model, as well as local partner agencies that provide services and supports for Orange County senior residents. MHAT also has a proven record of successfully developing and implementing the Compeer program for the severely mentally ill - which utilizes the friend-to-friend volunteer model.

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[10] Nicholas R. Nicholson's A Review of Social Isolation, The Journal of Primary Prevention, June 2012.
[11] 2013 United States of Aging Survey, conducted by The National Council on Aging, United Healthcare and USA Today.
[12] Centers for Disease Control and Prevention and National Association of Chronic Disease Directors; Issue Brief #1, MAHA, 2008.

The *Compeer for Seniors* program will match identified/at-risk individuals with carefully selected volunteers who will engage them in activities of mutual interest to increase a sense of fulfillment in their own lives, and to inspire them to get out and engage within their community. Compeer's model of engagement is based upon the development of one-on-one ongoing friendships in which trust and intimacy are developed, over time.

Compeer for Seniors will recruit, screen, train, match, and monitor volunteers who are interested in actively helping seniors by providing emotional support through friendship. Through these supportive one-to-one matches, opportunities are created for personalized attention and the modeling of healthy choices. While Compeer friends are *not* medical, social work, or psychiatric professionals, they are trained to identify needs, consult with Compeer staff about resources, and advocate for their friend. The matched consumers would participate in various community activities as well as Compeer sponsored group activities in order to provide a circle of friendship and support. The *Compeer for Seniors'* activities and projects would be designed to strengthen or rekindle unique talents and skills leading to healthier lifestyles. Additionally, *Compeer for Seniors* would provide volunteers with ongoing staff support and training in developing strength-based relationships.

MHAT's *Compeer for Seniors* program would also integrate the MAP objective, "collaborate with faith-based groups and other chaplaincy organizations to provide for the psychological, emotional, and spiritual needs of older adults." MHAT will draw upon its active relationship with the faith community to recruit and engage volunteers within congregations and community groups (and to refer potential senior client 'friends'). MHAT is a member of the Faith Connections network, and as such, has a built-in of prospects (both volunteers and seniors in need of a Compeer friend) from which to draw. MHAT's relationship with Faith Connections is solid; our agency's Compeer coordinator will be a featured guest speaker at the organization's upcoming spring conference.

An additional MAP objective addressed by the *Compeer for Seniors program:* to "improve quality and access to mental health and substance abuse services for older adults and their families." MAP's strategy aims to educate older adults on the importance of identifying mental health and substance abuse issues such as misuse and abuse of prescription drugs, depression, anxiety, alcohol use/addictions, and dementia. The intimate nature of the trust-based relationship that develops within Compeer friendships – supported by staff supervision and collaborative agency involvement - is conducive to a proactive approach to gentle awareness-building and education. Again, while Compeer friends are not medical or psychological professionals, they receive training on warning signs and important issues, and resources and support services are available to them.

Compeer for Seniors has the potential to expand upon this goal by working with local senior agencies and with Compeer Inc. at the national level. The national program supports its affiliate programs through program expertise, branding, and marketing communication to provide cost-effective solutions to communities. Compeer serves and supports its affiliate programs with program start-up training and best practice management, timely news and information; research, data and statistics, volunteer recruitment strategies, conferences, and web-conference educational series.

In summary, this new initiative - MHAT's *Compeer for Seniors* - has been developed to address a real and growing need within our community and will build upon the documented success of the Compeer program both nationally (supported by statistical evidence) and locally (supported by client surveys and direct reports). Not only this, MHAT's Compeer for Seniors will directly support the goals and objectives outlined as priorities within the Orange County Master Aging Plan.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Beginning in FY14-15 and continuing forward, MHAT has clarified the core services it provides within its programs, and done so in relation to the agency's overall mission. MHAT has focused its resources on services most closely aligned with its mission, and reduced expenses to match its level of public and private core support. In doing so, the agency is operating with more efficiency and is leveraging its resources to serve more individuals and families living with mental illness.

Beyond the efficiencies noted above, there are no other operational or financial changes being considered for FY 2015-16.

PROGRAM 4 - Compeer for Seniors (NEW) (Orange County):

MHAT is seeking funding for a new program, *Compeer for Seniors* for FY 15-16.

4. Outline anticipated internal or external revenue sources for the program(s). Indicate whether these are ongoing or new sources.

MHAT anticipates continued funding from its current public revenue sources, at either the same or slightly increased levels. During FY14-15, MHAT has increased significantly its private revenue sources through donations and grants from foundations and other sources. MHAT has focused time and resources on researching new funding sources, obtained funding from several of those new sources, reestablishing and staying connected to loyal donors, and as a result, has increased the level and amount of community support through donations. MHAT expects these strategies to continue to bear fruit in the future.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies that accomplish or enhance the Projected Results in the Program(s) to be funded.

PROGRAM 1 - Family Advocacy Network (FAN) (Town of Chapel Hill and Carrboro):

- **Exceptional Children's Assistance Center (ECAC) -** FAN partners with the ECAC to provide professional development to staff and free workshops to parents in the community while offering ECAC a venue to meet their organization's goals
- **KidSCope -** FAN collaborates with this agency to provide professional development for FAN staff and the FAN provides trainings in "Common Sense Parenting" to their parents of toddlers/pre-schoolers with emotional-behavioral challenges and reinforces the concept that mental illness is treatable and early intervention works

- **Orange County Care Review** - A FAN staff member attends Care Review meetings in a coordinated effort to support the family voice when a parent is applying for out-of-home placement for their child with at-risk behaviors.
- **Orange County Collaborative** - A FAN staff member attends monthly collaborative meetings which is a working group designed to learn from other members, identify gaps and needs for mental health services delivered to youth under age 18 and work in partnership with the committee to develop ways to fill the identified gaps in treatment services and skills building to parents, youth and families.
- **Orange County Department of Social Services (DSS)** - FAN collaborates with DSS by providing parent skills building training to parents referred by DSS social workers, utilizing the "Common Sense Parenting" best practices curriculum and providing 1:1 support to help referred clients be compliant with court or department orders.
- **NC Families United** - FAN is a charter member of this statewide organization which provides support and technical assistance to community parent-driven programs which assist parents raising children with mental illness. The collaboration has provided professional development to FAN Advocates and through its Youth MOVE program, provides free workshops for parents in Orange County. FAN also contributes input into trainings that provide professional development of parent partners through NCFU.
- **Volunteers for Youth** - FAN partners with Volunteers For Youth to help youth who are court involved comply with community service learning hours. In FY 2015-16, FAN will partner with Volunteers for Youth to provide support and training opportunities to parents of youth in their mentoring and restitution programs.

PROGRAM 2 - Pro Bono Counseling Network (PBCN) (Town of Chapel Hill and Carrboro):

- **Orange County Refugee Health Coalition** - MHAT staff collaborate with OCRFC to research the potential of providing interpreter services to PBCN therapists for services to the Burmese/Karen population. Many of these adults are not eligible for Medicaid or Medicare.
- **UNC Counseling & Psychological Services** - PBCN provides appropriate referrals when a client is a UNC student, but is not eligible for PBCN services. PBCN Program Coordinator attends their annual Provider Meet & Greet and receives direct referrals.
- **The Compass Center** - PBCN PC refers clients for various issues affecting women, including domestic violence or legal support. PBCN receives referrals from them.
- **UNC Family Medicine** - Amy Prentice, their social worker, consults with the PBCN Program Coordinator frequently about local mental health providers and refers clients for PBCN services.
- **Carolina Outreach** - PBCN receives referrals from Carolina Outreach particularly if a client is not eligible for IPRS funds or have already used those funds and needs more treatment. Cherry Hitt, the Carolina Outreach's Latino Services Coordinator/Therapist, is on the PBCN Advisory Board. Their ACT teams refers Compeer friends and participate in match meetings.

PROGRAM 3 - Compeer for Severe and Persistent Mentally Ill Adults (Town of Chapel Hill and Carrboro):

- **UNC XDS/Step & OASIS** - When PBCN staff screen a client who has severe and persistent mental illness such as Bipolar Disorder or psychosis, a referral is made to UNC XDS. Staff also participate with Compeer by assisting with volunteer training and referrals.
- **Club Nova** - Many Compeer Friends are also members of Club Nova. Club Nova staff also help coordinate Compeer referrals.
- **Volunteer Center of Durham** - Partners with the Compeer Program and helps recruit interested volunteers through their website, www.handsontriangle.org as well as hosts the Annual **Duke University** Volunteer Fair that the Compeer Program Program Coordinator attends.
- **Retired and Senior Volunteer Program (RSVP) of Durham County** - Partners with the Compeer Program to recruit, interview and refer volunteers.
- **Carolina Center for Public Service** - Helps to recruit UNC students to become Compeer volunteers.
- **NC State School of Social Work Volunteer/Career Fair** - Assists with volunteer recruitment through offering a booth at their fair.
- **Faith Connections on Mental Illness** - Assists with both volunteer recruitment and educating the public about the Compeer Program.

PROGRAM 4 - Compeer for Seniors:

- **The Florence Gray Soltys Adult Day Health Program** – Will partner with the Compeer for Seniors Program to identify appropriate seniors to refer to the program; assists with networking and promoting the program in the community.
- **Volunteer Center of Durham** - Partners with the Compeer Program and helps recruit interested volunteers through their website, www.handsontriangle.org as well as hosts the Annual **Duke University** Volunteer Fair that the Compeer Program PC attends.
- **Retired and Senior Volunteer Program (RSVP) of Durham County** - Partners with the Compeer Program to recruit, interview and refer volunteers.
- **Carolina Center for Public Service** - Helps to recruit UNC students to become Compeer volunteers.
- **NC State School of Social Work Volunteer/Career Fair** - Assists with volunteer recruitment through offering a booth at their fair.
- **Faith Connections on Mental Illness** - Assists with both volunteer recruitment and educating the public about the Compeer for Seniors Program.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Through the Latino Services, MHAT staff members attend the WEST meetings which help MHAT programs to network with the Spanish-speaking community, including therapists and other Latino programs serving individuals and families with mental health needs. The FAN Bilingual Advocate is actively engaged in the Hispanic community and FAN Advocates attend BECOMING events which serve minority families raising at-risk youth. FAN staff also participate in professional development training on cultural diversity and include training on cultural diversity in their curriculum to train volunteer parent partner mentors.

The PBCN Coordinator works with staff from El Futuro and the Orange County Health Department to connect members of the Hispanic community with volunteer pro bono therapists whenever possible.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education		X		X
Health and Nutrition		X	X	X
Job Training				
Sports and Arts Activities			X	X
Pre-School Activities				
After-School Activities				
Mentoring/Ongoing Friendship		X	X	X
Transportation			X	
Housing				
Other	X	X	X	X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals - Family Advocacy Network (Program 1)	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
At least 70% of the parents of children living with a mental health condition, co-occurring mental illness or substance abuse who complete parent skill-building training (6 weeks) will report increased competencies in the areas of 1) reducing child's problem behavior; 2) improved family relationships; 3) conflict resolution; and 4) coping skills.	FAN advocates will provide small group parenting skills classes, education and support groups, and 1:1 meetings when required.	Out of 90 clients who worked 1:1 with FAN staff in FY 13-14, 82 reported improvements in the stated objectives. 91% result (above goal)	The NC Department of Public Safety NC ALLIES Client Tracking to Improve Effective Services is utilized to track and measure objectives.
At least 70% of parents of court involved and/or at-risk youth will report behavioral improvements and satisfactory community engagement to change their child's negative behaviors and connect youth to a positive community resource.	FAN advocates will meet 1:1 with parents of court involved and/or at-risk youth to help parents gain skills to change their child's negative behaviors, advocate with parents for services their child needs, teach parents self-advocacy skills, and connect youth to a positive community resource.	Of the 90 clients who worked 1:1 with FAN staff in FY 13-14, 81 reported behavioral improvements, satisfactory community engagement and positive community connections for their child. 90% results (above goal).	A combination of parent reporting utilizing a copeability scale at intake and termination, as well as documentation from Youth Planning Conference (YPC) reports provided by court counselors, school staff and parents.

FAN advocates will provide service consultation and navigation assistance to 200 individual families. At least 75% of parents who receive brief consultation, advocacy support, and assistance from FAN staff for navigating their child's service system (e.g, schools, mental health, juvenile court) will report that they are more knowledgeable and confident about where and how to obtain services for their child	FAN advocates will provide support, advocacy and information/referral assistance for parents who call MHAT/FAN for help with services for their child. FAN advocates will spend approximately 1-4 hours on one or more phone call or 1:1 meetings to identify needs, services, providing service navigation assistance, supporting and coaching parents on how to advocate for needed services and how and where to connect youth to positive community resources.	In FY13-14, FAN advocates provided service consultation and navigation assistance for 205 individual parents, a dramatic increase from prior years. Data for the last half of FY13-14 indicated that 85% of parents receiving consultation services were satisfied with the assistance they received.	In prior years, FAN staff had not collected information about the consultations provided, except to track the overall number. During the last 6 months of FY13-14, FAN staff began gathering and documenting specific information from parents during these consults (home city/county, contact information for needed follow-up, nature of parent's requests, information provided, and indication of parent's satisfaction with information and support provided), as a way to track needs, service information provided, and parent satisfaction with the consultation.
At least 75% of parents attending FAN-hosted community trainings will report the information to have been helpful and satisfactory.	FAN advocates will host 10 community trainings on topics designed to improve knowledge and levels of competencies among approximately 300 parents whose children are at-risk of or have a mental health issue, co-occurring mental illness or substance abuse issue.	Out of 314 FAN workshop registrants in FY 13-14, a total of 305 rated their experience as having been helpful and satisfactory. 97% results (above goal).	Standardized evaluation forms are administered at every workshop and training to measure satisfaction.

If program(s) did not meet its stated goal(s), please explain: Program exceeded its goals.

Stated Program Goals - Pro Bono Counseling Network (PBCN) - Program 2	Program Activities	Actual Results for FY 13-14	Evaluation Method

Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Orange County residents who are uninsured (w/o Medicaid/Medicare) or underinsured without the means to either meet their deductible or afford their copayment will be referred to a local, licensed mental health provider to receive up to 8 free psychotherapy sessions.	PBCN staff will develop and maintain a sufficiently large network of volunteer licensed mental health providers, screen callers for eligibility, conduct a clinical intake and match callers with an appropriate provider for treatment.	For MHAT's entire PBCN program, approximately 50 individuals were matched with a licensed mental health professional in FY12-13 resulting in approximately 400 hours of volunteer treatment. At an average cost of $100 per hour, approximately $40,000 of treatment was provided. In addition, of the therapists that responded to the 2012-2013 annual review, 49% of their cases were still open after the initial 8 sessions and were still pro bono. The overall program has expanded by almost 25% within the past fiscal year: 75 individuals were matched with a licensed mental health professional in FY13-14 resulting in approximately 600 hours of volunteer treatment with $60,000 of treatment provided. Many therapists opt to continue to see their pro bono clients beyond the 8 free sessions either at a reduced rate or pro bono.	PBCN volunteer therapists complete a Quarterly Report Form that captures data regarding the number of sessions, current outcome/status of each case, and availability for additional PBCN referrals.
75% of clients will have improved mental health status and functioning during and/or at completion of PBCN services, as reported by PBCN therapists.	PBCN staff conduct a clinical evaluation of the client's needs. Based on this intake interview, PBCN staff identifies an available volunteer therapist who specializes in treatment modalities that best match the client's needs.	Of the therapists who responded to the Quarterly Report Forms, responses indicated that 47% of clients experienced improved mood and functioning. Of the clients who responded to the Client Satisfaction Survey, 100% reported they would recommend PBCN to	PBCN clients are asked to complete a questionnaire following their treatment. Data captured includes satisfaction with PBCN process and therapist match, changes in their life situations, and adjustments in their mental health status and overall well-being.

		someone in need of counseling; 100% reported they were matched with a therapist within a reasonable timeframe to address their needs; and 83% were happy with the services they received.	
PBCN staff will host educational workshops in partnership with Wake AHEC on topics relevant to clinicians (accredited continuing education) - to provide incentives for practitioners (PBCN therapists attend for free), recruit new therapists, and to assist therapists with licensure requirements.	PBCN staff identify clinical areas of interest and recruit professional presenters for 2-3 hour long CEU workshops throughout the year. PBCN staff assist with providing Wake AHEC with marketing materials for each workshop and coordinate logistics.	The PBCN Education Series presented 6 clinical workshops during FY13-14 in partnership with Wake AHEC -attended by a total of 108 local mental health professionals.	Workshop attendees completed online evaluations after each workshop (required for receiving CEU credits). PBCN staff received summary of responses, helpful in guiding topic choices for upcoming sessions.

Stated Program Goals - Compeer - Program 3	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
75% of individuals living with severe and persistent mental illness referred to Compeer will be matched with a trained volunteer for weekly social activities.	Compeer staff promotes the program with therapists, recruits volunteers, coordinates and facilitates match meetings, and supports both the Compeer friends and volunteers as needed throughout the course of the relationship.	Of the 20 matched Compeer friends and volunteers, 80% remain engaged in weekly social outings leading to improved socialization skills, reduced isolation, and reduced frequency of noncompliance with treatment. The Compeer program hosted 2 cook-outs with	The Compeer Program Coordinator tracks the number of current, new, and terminated Compeer matches on a monthly basis, maintain a monthly record of volunteer hours and activities, and reviews monthly reports in order to respond to volunteer needs.

		social activities for Compeer friends and volunteers, as a means to increase social engagement.	
95 % of the Compeer participants will report that his/her Compeer friend has had a positive impact on their lives and 75 % will show improved management of their illness demonstrated by reduction in need for hospitalization and/or crisis services.	Compeer staff recruit, train and match volunteers, monitor progress, and offer ongoing support to both volunteers and friends.	Actual results tabulated by Compeer, Inc demonstrates positive outcomes on a number of scales associated with increased social functioning, self-esteem, and reduced isolation. 97% of adult clients that responded to the 2013 Compeer, Inc. Annual Survey reported an overall happiness with Compeer. 90.2% also reported a sense of improved quality of life.	The Compeer program of MHAT participates in the Compeer, Inc. Annual Survey which is used to gain information about program services and populations served. Specifically, the survey gathers data regarding the impact of the Compeer program on clients, based on input from clients, volunteers, and referring mental health professionals. Results from the Annual Survey are used to measure success of and satisfaction with the program.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals Family Advocacy Network (FAN) - Program 1	**Program Activities**	**Anticipated Results for FY 15-16**	**Evaluation Method**
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
At least 85% of the expected 80 families who complete 1:1 FAN program services will report increased competencies in the areas of reducing their child's problem behavior, maintaining court compliance when applicable and/or meeting goals established at FAN intake.	Family Advocacy Network (FAN) advocates will provide small group parenting skills classes for English and Spanish-speaking parents, educational workshops and support groups, and 1:1 support and meetings when required.	Out of the estimated 80 FAN clients who will receive 1:1 services in FY 15-16, 68 parents (85%) will report increased competencies in the areas listed. At least 80% of the 85 FAN clients who will receive 1:1 services in FY15-16 will not have new delinquency petitions filed with the court while receiving services.	The NC Department of Public Safety NC ALLIES Client Tracking to Improve Effective Services is utilized to track and measure objectives.
At least 80% of the court involved and/or at-risk youth will demonstrate behavioral improvements and connections with positive community resources (e.g., increased school attendance and academic performance, reduced number of suspensions, decreased court involvement, connections with positive peers and activities).	FAN advocates will meet 1:1 with parents of court involved and/or at-risk youth to help parents gain skills that reduce their child's negative behaviors and to connect youth to positive peers and community resources. FAN advocates will also attend court planning and child/family team meetings to gain team insight around needs and progress.	Of the estimated 80 FAN clients who will receive 1:1 services in FY 15-16, 64 parents (80%) will report behavioral improvements and connections to positive community resources.	A combination of parent reporting utilizing a copeability scale at intake and termination, as well as documentation from Youth Planning Conference (YPC) reports provided by court counselors, school staff and parents.
FAN advocates will provide service consultation and navigation assistance to	FAN advocates will provide support, advocacy and information/referral assistance for parents who	In FY 15-16, FAN advocates will provide service consultation and navigation assistance for	FAN staff collect specific information from parents during the consults (home

200 individual families. At least 75% of parents who receive brief consultation, advocacy support, and assistance from FAN staff for navigating their child's service system (e.g, schools, mental health, juvenile court) will report that they are more knowledgeable and confident about where and how to obtain services for their child	call MHAT/FAN for help with services for their child. FAN advocates will spend approximately 1-3 hours on one or more phone calls identifying services, providing service navigation assistance, supporting and coaching parents on how to advocate for needed services and how and where to connect youth to positive community resources.	200 individual parents. 85% of parents receiving consultation services will be satisfied with the assistance they received.	city/county, contact information for needed follow-up, nature of parent's requests, information provided, and indication of parent's satisfaction with information and support provided), as a way to track needs, service information provided, and parent satisfaction with the consultation.
At least 80% of the 50 parents completing FAN facilitated parent skills building classes in FY14-15 will report satisfaction around strengthening their parenting skills and improving parent-child interactions.	FAN advocates will facilitate at least 10 rounds of the best practice curriculum, "Common Sense Parenting," serving approximately 50 parents raising children with emotional-behavioral challenges during FY14-15. The course will be offered in English and Spanish versions.	Of the approximate 60 parents who complete a series of "Common Sense Parenting" classes in FY15-16, 48 (80%) will report satisfaction in having strengthened their parenting skills and improved their parent-child interactions.	Standardized evaluation form administered at the end of each training.
At least 80% of parents attending FAN-hosted educational workshops and trainings will find the information to have been helpful and satisfactory.	FAN advocates will host 6 to 10 community trainings on topics that improve knowledge and levels of competencies for approximately 300 parents whose children are at-risk or have a mental health issue, co-occurring mental illness or substance abuse issue.	Out of the estimated 300 registrants who will attend FAN-sponsored educational workshops in FY 15-16, 240 registrants or 80% will report increased knowledge and competencies at the completion of each workshop.	Standardized evaluation form administered at the end of each training.

Stated Program Goals **<u>Pro Bono Counseling Network (PBCN) - Program 2</u>**	**Program Activities**	**Anticipated Results for FY 15-16**	**Evaluation Method**
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the***	***School records were checked to verify that students had not been suspended.***

		school system. 90% result (above goal)	
Orange County, Chapel Hill and Carrboro residents without insurance or means to pay for therapy will be referred to a licensed therapist for care.	PBCN staff will develop and maintain a sufficiently large network of licensed therapists, will screen callers and determine eligibility, and will match the caller with a therapist for treatment. PBCN staff will track calls from individuals seeking counseling who are not eligible for services, based on financial or geographic criteria, or severity or acuity of their mental illness. PBCN staff will refer those individuals to other appropriate community mental health resources (e.g., Cardinal Innovations, Alliance Behavioral, El Futuro, therapists who have sliding fees, specific intensive outpatient programs).	Approximately 80 matches will be made during FY 15-16 for the entire PBCN program, providing 8 free counseling sessions for each person, with a total value of approximately $64,000.	Quarterly, PBCN volunteer therapists report the number of sessions they have provided in the quarter, current outcome or status of case, and their availability for additional PBCN referrals.
75 % of clients served will have improved mental health status and functioning during and/or at completion of PBCN services as reported by PBCN volunteer therapists and clients.	PBCN staff will conduct a clinical evaluation of the client's needs and identify an available volunteer therapist who specializes in treatment modalities that will match the client's needs.	75% of clients will experience improved mood and functioning as reported by both themselves and their therapist.	PBCN clients are asked to complete a questionnaire following their work with a PBCN volunteer therapist. Data captured includes satisfaction with the PBCN process and therapist match, changes in their life situations, and adjustments in their mental health status and overall well-being.
PBCN staff will host 6 continuing education sessions on topics relevant to PBCN	PBCN staff will identify clinical areas of interest and obtain presenters for the 2-3 hour long CEU	The PBCN Education Series will present at least 6 clinical workshops during 2015-2016.	Online evaluations by attendees after each workshop in order to receive certification of

volunteer therapists and other clinicians in the community, as a means to help grow the therapist Network and to help therapists meet ongoing license requirements.	workshops. PBCN staff will provide marketing material for each workshop with the entity responsible for workshop registration and CEU's. PBCN will coordinate the details of each workshop, including introductions, roster, fees, etc.		completion for CEU's. Attendees' responses and suggestions are used to improve the workshops and guide choices regarding upcoming workshops.

Stated Program Goals **<u>Compeer for Severe and Persistent Mentally Ill Adults - Program 3</u>**	**Program Activities**	**Anticipated Results for FY 15-16**	**Evaluation Method**
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
75% of individuals living with severe and persistent mental illness referred to Compeer will be matched with a trained volunteer for weekly social activities.	Compeer staff will promote the program with therapists and volunteers in order to secure referrals from therapists and match clients with a trained volunteer.	Approximately 25 ongoing Compeer matches will be supported by Compeer staff during FY 15-16. The Compeer "waiting pool" will be reduced by 50% during FY 15-16. Compeer Friends and volunteers will engage in weekly social outings leading to improved socialization skills, reduced isolation, and reduced frequency of noncompliance with treatment.	The Compeer Program Coordinator will track the number of current, new, and terminated Compeer matches on a monthly basis, maintain a monthly record of volunteer hours and activities, and review monthly reports in order to respond to volunteers needs.
95 % of the Compeer participants will report that his/her Compeer friend has had a positive	Compeer staff will recruit, train and match volunteers, monitor progress, provide ongoing support to both	Actual results will be tabulated by Compeer, Inc to demonstrate positive outcomes on a number of	The Compeer program of MHAT participates in the Compeer, Inc. Annual Survey that is

impact on their lives and 75 % will show improved management of their illness demonstrated by reduction in need for hospitalization and/or crisis services.	volunteers and friends and host quarterly social events for Compeer volunteers and their friends.	scales associated with increased social functioning, self-esteem, and reduced isolation.	used to gain information about program services and populations served. Specifically, the survey gathers data regarding the impact of the Compeer program on clients, based on input from clients, volunteers, and referring mental health professionals. Results from the Annual Survey are used to measure success of and satisfaction with the program.

Stated Program Goals **Compeer for Seniors (NEW Program) - Program 4**	**Program Activities**	**Anticipated Results for FY 15-16**	**Evaluation Method**
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
75% of seniors over the age of 60 struggling with loneliness/isolation, depression, anxiety, or other mental health problems who are referred to Compeer for Seniors will be matched with a trained volunteer for weekly social activities/visits.	Compeer for Seniors staff will promote the program with a wide variety of client referral sources including community agencies serving the elderly, physicians, family members, and mental health professionals. Staff will use numerous methods of outreach to inform the community about our services including presentations at senior centers, day programs, and social clubs. We will utilize all local media as well as canvas the community with brochures, newsletters, and flyers. Compeer for Seniors staff will recruit, train, and	Compeer for Seniors friends and volunteers will engage in weekly social activities/visits for at least one hour leading to reduced isolation, increased opportunities for social integration through cultural, educational, and recreational activities, to help prevent and decrease emotional problems, and increase preventive health practices. Volunteers will commit to a minimum of one year with their Compeer Senior Friend.	Compeer for Seniors staff will track the number of current, new, and terminated matches on a monthly basis, maintain a monthly record of volunteer hours and activities, and review monthly reports in order to respond to volunteers needs.

	match volunteers with a Compeer Senior in a one-to-one supported friendship.		
95% of Compeer for Seniors participants will report that they are getting the social-emotional support they need; 80% of participants will report they are doing more community activities; and 95% of volunteers will report they have improved the lives of the people they served.	Compeer staff will train and match volunteers, monitor progress, provide ongoing support including referrals for services with organizations such as Meals on Wheels, food pantries, soup kitchens, domestic violence shelters, Orange County Department of Aging, mental health service providers, crisis response teams, recreation programs, community events, places of worship, etc. Compeer for Seniors will also host quarterly social enrichment events that volunteers, friends and individuals who are waiting to be matched are invited to attend.	Actual results will be tabulated by Compeer, Inc. to demonstrate positive outcomes on a number of scales associated with increased social-emotional support and time spent doing more community activities.	The Compeer for Seniors program of MHAT will participate in the Compeer, Inc. Annual Survey that is used to gain information about program services and populations served. Specifically, the survey gathers data regarding the impact of the Compeer program on clients, based on input from clients, volunteers, and referring professionals. Results from the Annual Survey are used to measure success of and satisfaction with the program.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **The Marian Cheek Jackson Center for Saving and Making History**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 9,098	$ 6,000	$ 9,000	50%
Program Generated Revenue (fees)	$ 2,050	$ 11,000	$ 15,000	36%
Local Government Grants:				
Orange County	$ 4,500	$ 6,000	$ 10,000	67%
Town of Chapel Hill	$ 1,000	$ 1,000	$ 7,000	600%
Town of Carrboro	$ 750	$ 750	$ 3,500	367%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Strowd Roses	$ 7,500	$ 7,500		-100%
Other Grants: Mary Duke Biddle and Youth Fo	$ 9,000	$ 5,000	$ 15,000	200%
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 33,898**	**$ 37,250**	**$ 59,500**	**60%**
PROGRAM EXPENSES				
Compensation	$ 31,100	$ 34,362	$ 45,300	32%
Rent & Utilities	$ 4,733	$ 5,383	$ 7,000	30%
Supplies & Equipment	$ 876	$ 1,500	$ 4,500	200%
Travel & Training	$ -	$ 100	$ 200	100%
Other Expenses:	$ 236	$ 2,000	$ 2,500	25%
Please list 3 largest "Other Expenses":				
Printing and Copying $ -				
$ -				
$ -				

Total Program Expenses	**$ 36,945**	**$ 43,345**	**$ 59,500**	**37%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (3,047)**	**$ (6,095)**	**$ -**	**100%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

Fiscal Year **Family Advocacy Network (FAN)**	**Total Program Units**	**Total Program Units that Met Program Goals**	**Total Program Cost**	**Program Unit Cost++** = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	371	334	$173,738	$520
Estimated FY14-15	328	328	$147,473	$500
Projected FY15-16	340	340	$150,200	$491

1) Define one unit of service[+]: Program (1) Family Advocacy Network (FAN): – one unit equals one family served by 1:1 Family Advocacy Services; one family completing "Common Sense Parenting" course; or one family receiving consultation regarding services, advocacy support, or service navigation assistance.

Fiscal Year	**Total Program Units**	**Total Program Units that Met Program Goals**	**Total Program Cost**	**Program Unit Cost++** = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	177	150	$ 32,238	$215
Estimated FY14-15	367	312	$ 33,465	$107
Projected FY15-16	405	344	$ 36,730	$107

2) Define one unit of service[+]: PROGRAM (2): Pro Bono Counseling Network (PBCN) – One unit of service in PBCN is defined as one client matched with a PBCN volunteer therapist, or one individual who receives clinical consultation and referral to other appropriate mental health services due to county of residence or acuity of need.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	**Program Unit Cost++** = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	20	18	$ 21,034	$1,169
Estimated FY14-15	23	20	$ 21,564	$1,078
Projected FY15-16	25	21	$ 21,800	$1,038

3) **Define one unit of service**[+]: PROGRAM (3): Compeer for Severe and Persistent Mentally Ill Adults – One unit of service is defined as one match of a Volunteer with a Compeer Friend

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	**Program Unit Cost++** = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	N/A	N/A	N/A	N/A
Estimated FY14-15	N/A	N/A	N/A	N/A
Projected FY15-16	10	10	$ 29,618	$ 2,961

4) **Define one unit of service**[+]: Program (4) - Compeer for Seniors (NEW) - One unit of service is defined as one match of a Volunteer with a Senior Compeer Friend

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000)

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Family Advocacy Network (FAN)

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	51	48	51	Durham City			
Female	39	30	34	Durham County	7	4	4
2. **Ethnicity**				Raleigh City			
African-American	21	16	20	Wake County			
Caucasian	40	14	35	Town of Chapel Hill	26	24	31
Hispanic	27	38	30	Town of Carrboro	13	8	22
Other	2	10		Orange County	44	42	28
3. **Age**				Other (specify)			
0-5 Years		5	10	Per cent of clients at, or below, federal poverty level	N/A	N/A	N/A
6-18 Years	90	73	75				
19-50 Years				Individual Family Consultations/ Referrals/ Service Navigation Assistance (# of Parents)	205	200	200
51+ Years				# of Parents Completing "Common Sense Parenting" Classes (fewer classes in FY14-15)	76	50	60
				# of Parents Receiving 1:1 Family Advocacy (3-6 months)	90	78	80
Unknown				***TOTAL # OF CLIENTS SERVED***	371	328	340

PROGRAM BENEFICIARY DEMOGRAPHICS
Program: Pro Bono Counseling Network (PBCN)

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**			
Male	26	25	27
Female	49	50	53
2. **Ethnicity**			
African-American	13	15	16
Caucasian	51	49	52
Hispanic	4	5	6
Other	7	6	6
3. **Age**			
0-5 Years	0	0	0
6-18 Years	2	2	2
19-50 Years	56	55	58
51+ Years	17	18	20
Unknown			

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16
4. **Geographic Location(s)**			
Durham City			
Durham County	26	26	28
Raleigh City			
Wake County			
Town of Chapel Hill	21	20	22
Town of Carrboro	13	14	14
Orange County	11	12	12
Other (Person or Chatham Co.)	4	3	4
Per cent of clients at, or below, federal poverty level	n/a	n/a	n/a
Individuals seeking counseling who are ineligible because of the county they live in or acuity of needs (did not track fully in FY13-14)	102	292	325
TOTAL # OF CLIENTS SERVED	177	367	405

PROGRAM BENEFICIARY DEMOGRAPHICS
Program: Compeer for Severe and Persistent Mentally Ill Adults

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	9	11	12	Durham City			
Female	11	12	13	Durham County	5	6	6
2. **Ethnicity**				Raleigh City			
African-American	4	5	6	Wake County			
Caucasian	16	16	17	Town of Chapel Hill	11	12	12
Hispanic	0	1	1	Town of Carrboro	3	3	4
Other	0	1	1	Orange County	0	1	2
3. **Age**				Other (Chatham Co.)	1	1	1
0-5 Years	n/a	n/a	n/a				
6-18 Years	n/a	n/a	n/a	Per cent of clients at, or below, federal poverty level	n/a	n/a	n/a
19-50 Years	13	15	17				
51+ Years	6	7	7				
Unknown	1	1	1	***TOTAL # OF CLIENTS SERVED***	20	23	25

PROGRAM BENEFICIARY DEMOGRAPHICS
Program: Compeer for Seniors (NEW Progam)

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**	N/A	N/A		4. **Geographic Location(s)**	N/A	N/A	
Male	N/A	N/A	4	Durham City	N/A	N/A	
Female	N/A	N/A	6	Durham County	N/A	N/A	
2. **Ethnicity**	N/A	N/A		Raleigh City	N/A	N/A	
African-American	N/A	N/A	3	Wake County	N/A	N/A	
Caucasian	N/A	N/A	5	Town of Chapel Hill	N/A	N/A	2
Hispanic	N/A	N/A	1	Town of Carrboro	N/A	N/A	2
Other	N/A	N/A	1	Orange County	N/A	N/A	6
3. **Age**	N/A	N/A	N/A	Other (specify)	N/A	N/A	
0-5 Years	N/A	N/A	N/A				
6-18 Years	N/A	N/A	N/A	Per cent of clients at, or below, federal poverty level	N/A	N/A	N/A
19-50 Years	N/A	N/A	N/A				
51+ Years	N/A	N/A	10				
Unknown	N/A	N/A	N/A	***TOTAL # OF CLIENTS SERVED***	N/A	N/A	10

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **The Marian Cheek Jackson Center for Saving and Making History**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 28,692	$ 25,000	$ 25,000	0%
Agency Generated Revenue (fees)	$ 8,650	$ 63,250	$ 90,000	42%
Local Government Grants:				
Orange County	$ 4,500	$ 6,000	$ 10,000	67%
Town of Chapel Hill	$ 1,000	$ 1,000	$ 7,000	600%
Town of Carrboro	$ 750	$ 750	$ 3,500	367%
Other Local: ToCH Affordable Housing Fund	$ 35,000	$ 40,000	$ 40,000	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: 7 small grants	$ 26,400	$ 45,000	$ 50,000	11%
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 104,992**	**$ 181,000**	**$ 225,500**	**25%**
AGENCY EXPENSES				
Compensation	$ 97,452	$ 113,850	$ 150,000	32%
Rent & Utilities	$ 14,221	$ 16,150	$ 18,000	11%
Supplies & Equipment	$ 3,141	$ 11,750	$ 15,000	28%
Travel & Training	$ -	$ 1,500	$ 2,500	67%
Other Expenses:	$ 1,936	$ 37,750	$ 40,000	6%
Please list 3 largest "Other Expenses":				
Contract Services				
Insurance, Postage, Misc.				
Addition to safety reserves $ -				
Total Agency Expenses	**$ 116,749**	**$ 181,000**	**$ 225,500**	**25%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (11,757)**	**$ -**	**$ -**	**0**

Section VI.

Comparative Budget for Entire Agency
(Excel file)

Agencies must still send a copy of the MS Excel file with their electronic application, even if they choose to embed the Excel table, on this page. The MS Excel file can be found here.

1. Please complete a Comparative Budget Excel Form **for the entire agency.** This budget form is required, even if the figures match the Program Budget Form(s).

2. If the agency's finances experienced significant changes that you would like to explain, please use the space below.

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Mental Health America of the Triangle

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget FY15-16	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1.0 (FY13-14) .5 (FY14-15, FY 15-16)	1	$ 66,645	$ 38,693	$ 38,078	8%	N/A beginning FY14-15
FAN Program Manager (Program 1)	1.0 (FY13-14) .60 (FY14-15, FY15-16)	1	$ 57,157	$ 33,650	$ 32,578	7%	N/A beginning FY14-15
FAN Family Advocates (Program 1)	1.0 for 1 position and .38 for 2 positions (FY13-14) .60 for 3 positions (FY14-15 and FY15-16)	3	$ 80,186	$ 66,300	$ 66,896	15%	N/A beginning FY14-15

PBCN Coordinator (Program 2)	.62	Same staff person	$ 23,640	$ 24,634	$ 28,164	6%	N/A beginning FY14-15
Compeer Coordinator (Program 3)	.38		$ 13,200	$ 14,780	$ 9,013	2%	N/A beginning FY14-15
Compeer for Seniors (Program 4)	.5	1	N/A	N/A	$ 20,405	5%	N/A
Orange Partnership (No funds requested)	.45	3	$ 80,580	$ 74,690	$ 76,213	17%	N/A
FAN Volunteers (Program 1)	.25	10 volunteers	480	480	480	N/A	
PBCN Volunteer Therapists (Program 2)	.38	90-100+ volunteer therapists	91 volunteer therapists	103 volunteer therapists	115 volunteer therapists	N/A	
Compeer Volunteers (Program 3)	.42	20	20 volunteers	23 volunteers	25 volunteers	N/A	
Compeer for Seniors Volunteers (Program 4 - NEW)	.29 (12 months) .16 (6 months)	10	N/A	N/A	10 volunteers	N/A	

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: OE Enterprises, Inc.

Street Address: 348 Elizabeth Brady Road, Hillsborough, NC 27278

Mailing Address: 348 Elizabeth Brady Road, Hillsborough, NC 27278

Website Address: www.oeenterprises.org

Executive Director: Margaret Samuels

Telephone: 919-732-8124 E-Mail: samuelsm@oeenterprises.org

Contact Person: Tracey Craven

Telephone: 919-413-7476 E-Mail: cravent@oeenterprises.org

Fax: 919-732-4027 Federal ID Number: 57-0740781

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$45,100	$50,000
Summary of intended use of funds: OE Enterprises seeks funding for provision of vocational placement, training, and community integration supports for students and adults who have disabilities.		
Town of Chapel Hill	$6,000	$10,000
Summary of intended use of funds: OE Enterprises seeks funding for provision of vocational placement, training, and community integration supports for students and adults who have disabilities.		
Town of Carrboro	$3,500	$5,000
Summary of intended use of funds: OE Enterprises seeks funding for provision of vocational placement, training, and community integration supports for students and adults who have disabilities.		

Margaret Samuels
Executive Director

1/22/2014
Date

Paul W. Popish
Board Chair

1/22/2014
Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: November 19, 1981

   b. Years in Operation: 34 years

   c. Mission or Vision Statement (if applicable):

      Mission of OE Enterprises: Creating opportunities for personal and professional growth for person with disabilities or other barriers.

      Vision of OE Enterprises: OE Enterprises is a thriving business that promotes achievements, self-reliance, life choices and respect through relationships with community partners.

   d. Brief History of Agency:

      OE Enterprises, Inc. has been a fixture in the North Carolina business community for over 30 years with its roots in the Orange County area. OE Enterprises, Inc. (OE) was incorporated on November 19, 1981 as Orange Industries, a public non-profit agency that was part of OPC Mental Health Center serving individuals with disabilities in the Orange County area. On July 1, 1987 Orange Industries became a private non-profit agency and changed its name to Orange Enterprises, Inc. In October 2003 Orange Enterprises established a federal set-aside custodial operation in Winston-Salem and has since established similar sites across the state and in South Carolina. On July 1, 2005 Orange Enterprises began to provide vocational services for persons with disabilities in Alamance and Caswell counties, changing the organization's name to OE Enterprises. We expanded services to Durham County in 2009 and Rockingham County in 2010.

      In order to accomplish our mission OE provides vocational opportunities through community-based work experiences, in-house contract work, volunteer work serving the community and community integration. OE sub-contracts with local businesses in the areas of mailing sub-assemblies, packaging and product fulfillment. Services provided to individuals include evaluation, work adjustment, job placement, job coaching, long-term employment supports, career counseling, transitioning from school to work, retirement and sheltered employment. Through these services individuals with are offered the opportunity to overcome employment barriers.

      Through our mission, OE meets the employment needs of Orange County citizens with disabilities as well as the Orange County employment community. OE's Transition program provides job experiences to students, allowing them to make informed choices upon graduation and explore employment or post-secondary education options. Individuals who work at OE have the opportunity to go to work every day, earn a salary, buy goods and contribute to their communities.

Individuals learn needed skills and work habits that lead to community employment. Senior employees have the opportunity to participate in integrated community-based retirement activities. OE has helped thousands of individuals with disabilities gain employment and work towards self-sufficiency.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). IF MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

The rate of unemployment is a major issue facing the US as a whole although there have been improvements over the past year. In November 2014 the unemployment rate was 5.3% statewide with Orange County having an unemployment rate of 3.9%. Lower unemployment rates do not mean that Orange County does not face a serious unemployment issue, particularly among younger workers and those with disabilities.

The 2011 Orange County Community Health assessment reported that the unemployment rate for individuals with a disability was 23.2% statewide, but jumps to 41.1% in Orange County.

Given that Orange County has a disproportionate share of highly educated workers as compared to counties of similar size the lack of a college education is a more severe barrier to employment and those who do find employment often are not earning a living wage. Orange County has very few manufacturing jobs and employment is concentrated in government and University positions. Per the 2011 Community Health Assessment, the unemployment rate for individuals with only a high school diploma or equivalent stands at 26.2%. There are fewer opportunities for younger, entry level workers and there is increased competition for these jobs due to the UNC Student population (Orange County Community Health Assessment 2011, p70-71).

Statistics from the US Department of Labor, Office on Disability Employment Policy, show the extremely shocking nature of employment for those with disabilities. In 2014, the average employment rate for persons with disabilities, age 16 and over, was 17.1% as opposed to 64.6% for people without disabilities.

Individuals with disabilities (particularly those with intellectual/developmental disabilities) reach a "senior" age at an earlier chronological age than those without disabilities. OE classifies senior age as 55 or above. With medical advancement, better nutrition and services individuals with disabilities are living longer lives similar to the nondisabled population. There are few services available for integration of individuals with disabilities into established senior activities in the surrounding community and very few resources for seniors with disabilities to get assistance and they make life transitions toward retirement and decreasing activity. We have seen the importance of assisting individuals with disabilities who have reached senior age with community integration activities.

Services for disabled senior citizens are a critical need service. With OE's many years of experience in Orange County, we have watched and assisted as our clients have aged. Many need more, not less service. Mobility, vision, hearing, and balance are all affected as we age. For individuals with disabilities this can have a major impact on their quality of life. The need for a network of supports for adults with disabilities increases as they age but in reality their natural supports tend to decrease with parental

or family caregivers dying or becoming to elderly themselves to care for their family member. Many community supports that the individual has built over the years begin to fade. OE has based our work with disabled seniors on the proven best practice system of Supported Employment. Supported Employment is a system of supports for people with disabilities to assist them with employment in integrated settings. This system uses "coaches" to train individuals on skills that are task specific and on "soft skills" such as appropriate socialization in a work setting. Coaches also provide ongoing support. This proven model can be applied to community integration into senior activities as well. With the use of the coach, senior participants can learn about their communities, develop task specific skills, and increase socialization experiences by overcoming existing barriers.

Our program addresses the above issues by providing employment readiness training, job coaching, volunteer experiences and vocational placement and support to high school students and adults with disabilities. By preparing individuals for the transition to employment from high school we increase their chances of obtaining and maintaining employment. By providing work training, placement, and support to adults with disabilities we are addressing the rate of unemployment among individuals with disabilities in Orange County.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

OE Enterprises continues to work closely with our Managed Care Organization (MCO), Cardinal Innovations, to ensure our consumers continue to receive necessary services. OE continues to put additional resources in place, not only to secure services for the people we serve, but also to ensure that we receive reimbursement for services rendered.

Over the next few months, OE will phase into a system for electronic medical records. This will improve our data collection process, allowing increased quality of services and decrease the amount of resources needed for collection of revenues..

OE continues to deal with the tenuous state of the North Carolina Division of Mental Health, Developmental Disabilities, and Substance Abuse Services (MH/DD/SAS) and the Division of Vocational Rehabilitation. Previous cuts in service rates have not been reinstated. During this fiscal year the Division of Vocational Rehabilitation instated a new business management system. This has been a disjointed process with very little training provided prior to implementation. The new system has not affected services provided to our consumers but has created a need for OE to allocate additional resources to ensure reimbursement for services.

Funding changes are always something OE has to take into consideration as a provider of services. Over the past year the OE Board of Directors initiated a restructuring of executive management positions to improve the effectiveness of administrative functions; ensure financial viability and ultimately improve the quantity and quality of OE services and provide a more secure and sustainable future for OE, our consumers, community and our staff.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

In order to address our current economic conditions OE continues to operate in a mode of financial conservation while simultaneously examining our critical infrastructure for needed updates. We are in the process of updates to our IT infrastructure by moving toward an electronic medical record system. Our trade organizations (NCARF-North Carolina Association of Rehabilitation Facilities and NC APSE – North Carolina Association of Persons in Supported Employment) advocate regularly for funds at the state level.

In September of 2013 OE achieved our eighth CARF accreditation. We received a three-year accreditation, the highest level of accreditation possible. CARF (Commission on Accreditation of Rehabilitation Facilities) reviews and grants accreditation services nationally and internationally to human service providers signifying that services reviewed meet quality standards and produce best possible outcomes. Our next accreditation cycle is scheduled for September/October 2016. A national accreditation is mandatory for service provision.

We exceeded job placement outcomes with Vocational Rehabilitation during the 2013-2014 fiscal year. We strive towards exceeding our placement goals every year in order to increase revenue estimates. The job market in this area is extremely competitive. It is more difficult for everyone to find a job, including persons with disabilities, thus making it a challenge for our placement staff to attain all contracted income for placements. OE Enterprises has prepared for this challenge by altering our strategies. Each member of our programming team has been given goals with direct influence on job placement. We have also developed additional marketing tools that target employers and individual job placements. We are well on track to exceed last year's performance and our current contract.

Our production division continues to work hard to increase opportunities for our consumers. Increasing our production work will help support our program services division as well as assist in working towards our goal of developing an affirmative enterprise and training and assessing consumer skills . We have further developed our relationship with a local manufacturer of industrial extruded foam insulation and that relationship has spawned additional work opportunities for our organization with users of this foam. We continue to expand this aspect of our work, leading to additional employment avenues and revenues to offset state and federal budget cuts and provide excellent work and training opportunities for our clients.

We have developed relationships with several local product manufacturers to be their web store front. All orders from their products come into our facilities to be fulfilled, packaged, and shipped. This not only has created training opportunities for our consumers, but the opportunity for regular, competitive employment working for this division.

OE continues to implement cost saving measures. We have been able to cut costs or otherwise reduce expenditures through the establishment of a centralized purchasing function, realigning contracts and replacing old infrastructure. OE has reexamined out

paid time off policy and implemented a new policy that is more competitive in today's business world. OE will continue to search for ways to reduce costs and operate as efficiently as possible without sacrificing efforts to fulfill its mission.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- Third Sector Alliance - Through the Third Sector Alliance, OE is able to take an active part with other funded agencies to "provide a collective voice for the nonprofit sector". OE is member of the Third Sector Alliance and is represented on the steering committee.

- Inter-Agency Groups – OE is involved in groups such as the Chamber of Commerce, Cardinal Innovations (our local MCO), and the United Way of the Greater Triangle. OE is able to forge strong relationships through these local meetings. For example, when we have someone with a need for substance abuse or behavioral management treatment, we have contacts from those agencies that can assist. We participate in job fairs and community training with the school systems. We work with the college systems to engage volunteers, assist in recruiting staff and provide information to students interested in this profession.

- Basic Need Collaborations - We have a solid connection with Orange Congregation in Mission (OCIM) and regularly assist in food and coat drives. We also collaborate with OCIM and the Interfaith Council to assist our consumers with unmet basic needs including food. We also hold an annual blood collection drive at our Orange County location in collaboration with the American Red Cross. Our blood drive is always a huge success and we have historically met/exceeded our collection goals.

- State Trade Organizations - OE also interacts with other agencies in our field throughout North Carolina by participating in two trade organizations, the NC Association for Persons in Supported Employment (NCAPSE) and the NC Association of Rehabilitation Facilities (NCARF), to share ideas and training. OE staff members are very involved in both of these trade organizations and hold positions on the Board of Directors and executive officer positions within both organizations.

- Residential Supports - Many of the individuals we support receive services through various residential providers in the area. Housing is extremely important in employment success. Collaborating with these agencies assists our consumers in meeting their residential needs.

- Institutions of Higher Learning including the University of North Carolina at Chapel Hill, Duke University, University of North Carolina – Charlotte, and North Carolina A&T University. Over the past decade, OE has worked with our local colleges to provide services to our consumers and needed learning experiences for the students. During the past year, OE has worked with the biomedical engineering programs at each of these educational institutions. We participated in semester long

design products, resulting in the development of some amazing adaptive equipment to assist our consumers in preforming production tasks.

- Coordinated Employment Efforts - Employment First is the general philosophy that employment in the general workforce is the first and preferred outcome in the provision of publicly funded services for all citizens with disabilities regardless of level of disability, in a job of their choosing with supports and accommodations provided as necessary to achieve and maintain employment. OE has two staff active in the North Carolina Employment First Steering Committee, one serving as the NCEF co-chair.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

OE Enterprises strives to use various staff recruiting strategies. We participate in job fairs sponsored by local universities, community colleges, Department of Social Services, Recruit Military, and the Employment Security Commission. In 2010, OE received an honorable mention and in 2011 received an employer award from the American Legion for our employment outreach to veterans.

We continue to try to recruit staff fluent in Spanish to assist in all aspects of our services (communicating during student IEP meetings, direct service with persons served or working with individual employers and production business partners). This serves two purposes; not only does it help with communication but also assists others (staff, employees, etc.) in understanding cultural norms.

OE collaborates with other agencies in the community to identify ways to improve services for underserved populations such as the Hispanic, senior, and homeless populations. OE has a close relationship with Orange Public Transportation and Chapel Hill transit and advocates with these entities on a regular basis in order to work towards improving transportation options for all citizens in Orange County.

OE continues to increase cultural awareness within our organization. We have developed a cultural competency plan developed by our agency wide cultural competency committee. This plan encompasses all aspects of OE including cultural specific trainings, community activities to promote diversity, environmental awareness and ways to expand our recruitment strategies.

A member of OE's executive staff serves as the Chair of the Northern Region Global Continuous Quality Improvement Committee for Cardinal Innovations Healthcare Solutions. This Committee has determined that measuring outreach efforts to the Spanish speaking community from participating mental health agencies will be a top priority this year.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition				
Job Training	X	X	X	X
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
15 student participants will obtain jobs in their community	OE staff provides employment related services to students in transition services through the local high schools. These services include job placement, Job Club, job shadowing experiences, career explorations/counseling, assessments, assistance with volunteer experiences, and developing work portfolios.	OE assisted five students in securing employment.	Success defined by individuals placed into competitive employment. Employment records maintained on each individual.
50 adult participants will obtain jobs in their community	OE staff provides employment related services to adults. These services include self-determination training, vocational assessment, pre-vocational training, job placement services, intensive on-the-job training, and job follow up services as needed.	OE assisted 58 adults in securing employment.	Success defined by individuals placed into competitive employment. Employment records maintained on each individual.

If program(s) did not meet its stated goal(s), please explain:

OE exceeded our goals in placing adult program participants in employment. Achieving our projected goals for student participants heavily depends on the on objectives of the individual students and the amount of students in the program. Again this year, we many students whose goals are to continue their education at post-secondary institutions and are not interested in seeking employment during or right after graduation.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
15 student participants will obtain jobs in their community	OE staff provides employment related services to students in transition services through the local high schools. These services include job placement, Job Club, job shadowing experiences, career explorations/counseling, assessments, assistance with volunteer experiences, and developing work portfolios.	OE will assist 15 student participants in securing employment in their community.	Success defined by individuals placed into competitive employment. Employment records maintained on each individual.
50 adult participants will obtain jobs in their community	OE staff provides employment related services to adults. These services include self-determination training, vocational assessment, pre-vocational training, job placement services, intensive on-the-job training, and job follow up services as needed.	OE will assist 50 adult participants in securing employment in their community.	Success defined by individuals placed into competitive employment. Employment records maintained on each individual.
5 senior adult participants (age 55+) will begin transition to retirement.	OE provides services related to adult transition services to retirements. These services include continued job support; senior activities, transportation; volunteer experiences; retirement planning and community engagement.	OE staff will assist 5 senior adult participants in integrating into the aging services in Orange County	Success defined by individuals participating in retirements planning and activities

Section III. Program Budget
(Excel file)

Agencies must still send a copy of the MS Excel file with their electronic application, even if they choose to embed the MS Excel table, on this page. The MS Excel file can be found here.

1. Please complete a Program Budget Excel Form **for each requested program.** The Program Budget should reflect only figures and amounts associated with the Program(s) for which you are seeking funding and not the total agency budget.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: OE Enterprises, Inc

	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
PROGRAM REVENUE				
Private Donations	$ 1,715	$ 2,000	$ 2,000	0%
Program Generated Revenue (fees)	$ 1,196,254	$ 1,205,000	$ 1,205,000	0%
Local Government Grants:				
Orange County	$ 45,100	$ 45,100	$ 50,000	11%
Town of Chapel Hill	$ 6,000	$ 6,000	$ 10,000	67%
Town of Carrboro	$ 3,000	$ 3,500	$ 5,000	43%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 200	$ 1,000	$ 1,000	0%
Please list 3 largest Miscellanous sources:				
Contribution Income $ 200.00				
$ -				
$ -				
Total Program Revenue	**$ 1,252,269**	**$ 1,262,600**	**$ 1,273,000**	**1%**
PROGRAM EXPENSES				
Compensation	$ 986,810	$ 995,000	$ 1,000,000	1%
Rent & Utilities	$ 41,497	$ 45,000	$ 47,000	4%
Supplies & Equipment	$ 97,949	$ 110,000	$ 112,000	2%
Travel & Training	$ 42,970	$ 45,000	$ 47,000	4%
Other Expenses:	$ 95,519	$ 95,000	$ 95,000	0%
Please list 3 largest "Other Expenses":				
Subcontractor & Professional Fees $ 75,542.00				
Workers' Comp. Insurance $ 19,977.00				
$ -				
Total Program Expenses	**$ 1,264,745**	**$ 1,290,000**	**$ 1,301,000**	**1%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (12,476)**	**$ (27,400)**	**$ (28,000)**	**-2%**

2. If the program's finances experienced significant changes that you would like to explain, please use the space below.

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: One unit of service is defined by one day of service with an average of 250 days of service available per year for each person served. (Total Program Units = clients served X 250)

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	60,250	60,250	$1,264,745	$20.99
Estimated FY14-15	60,250	60,250	$1,290,000	$21.41
Projected FY15-16	60,250	60,250	$1,301,000	$21.59

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	132	132	132	Durham City	0	0	0
Female	109	109	109	Durham County	14	14	14
2. **Ethnicity**				Raleigh City	0	0	0
African-American	99	99	99	Wake County	0	0	0
Caucasian	133	133	133	Town of Chapel Hill	84	84	84
Hispanic	7	7	7	Town of Carrboro	28	28	28
Other	2	2	2	Orange County	106	106	106
3. **Age**				Other (specify) - Chatham	9	9	9
0-5 Years	0	0	0				
6-18 Years	24	24	24	Per cent of clients at, or below, federal poverty level	100%	100%	100%
19-50 Years	179	179	179				
51+ Years	38	38	38		241	241	241
Unknown	0	0	0	***TOTAL # OF CLIENTS SERVED***			

Section VI.

Comparative Budget for Entire Agency
(Excel file)

Agencies must still send a copy of the MS Excel file with their electronic application, even if they choose to embed the Excel table, on this page. The MS Excel file can be found here.

1. Please complete a Comparative Budget Excel Form **for the entire agency.** This budget form is required, even if the figures match the Program Budget Form(s).

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: OE ENTERPRISES, INC

	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
AGENCY REVENUE				
Private Donations	$ 2,198	$ 2,500	$ 3,000	20%
Agency Generated Revenue (fees)	$ 7,290,169	$ 7,320,000	$ 7,340,000	0%
Local Government Grants:				
Orange County	$ 45,100	$ 45,100	$ 50,000	11%
Town of Chapel Hill	$ 5,800	$ 6,000	$ 10,000	67%
Town of Carrboro	$ 3,000	$ 5,000	$ 10,000	100%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 14,500	$ 14,500	$ 14,500	0%
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 7,360,767**	**$ 7,393,100**	**$ 7,427,500**	**0%**
AGENCY EXPENSES				
Compensation	$ 5,693,572	$ 5,720,000	$ 5,750,000	1%
Rent & Utilities	$ 195,279	$ 195,000	$ 197,000	1%
Supplies & Equipment	$ 791,023	$ 794,000	$ 796,000	0%
Travel & Training	$ 196,231	$ 198,000	$ 200,000	1%
Other Expenses:	$ 505,917	$ 505,000	$ 505,000	0%
Please list 3 largest "Other Expenses":				
Subcontractor & Professional Fees $225,542.00				
Insurance Expenses $149,422.00				
Incentive Expenses $116,453.00				
Total Agency Expenses	**$ 7,382,022**	**$ 7,412,000**	**$ 7,448,000**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (21,255)**	**$ (18,900)**	**$ (20,500)**	**-8%**

2. If the agency's finances experienced significant changes that you would like to explain, please use the space below.

FY 2013-2014 was a transitional year for OE Enterprises, Inc. Our long term President retired in February, 2014 and a new President began in March, 2014. We saw delayed revenue due to the federal government shutdown and were impacted by delayed Medicaid payments and state vocational rehabilitation payment delays. We have achieved stability in our accounting department and have made some significant cost saving measures throughout the organization. We are working diligently in our production area to create more opportunities for individuals with disabilities to receive training.

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: OE Enterprises, Inc.

Position Titles * = Position Vacant	Full Time Equivalent* *	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Occupational Training Specialists	55	50%	1,136,986	1,142,263	1,148,254	20%	(H)
Placement Manager	1	50%	45,257	45,467	45,705	1%	(H)
Transition Coaches	2	50%	58,937	59,211	59,521	1%	(H)
Vocational Evaluator	1	50%	22,227	22,330	22,448	0.50%	(H)
Team Coordinators	12	34%	375,325	377,067	379,045	6.50%	(H)
Case Support Specialist	1	33%	30,771	30,914	31,076	0.50%	(H)
Community Services Managers	3	34%	165,798	166,568	167,442	3%	(H)
Job Development Specialists	7	21%	214,156	215,150	216,278	3.50%	(H)
Senior Management	14	17%	683,268	686,439	690,039	12%	(H)
Federal Contract Employees	60	0%	2,133,380	2,143,282	2,154,523	37%	(H)
Job Retention Coordinator	1	0%	43,984	44,188	44,420	1%	(H)
Administrative Staff	6	0%	127,852	128,445	129,119	2%	(H)
Production Staff	48	0%	655,632	658,676	662,130	12%	(H)
Volunteer	0.75						
TOTAL:			**5,693,572**	**5,720,000**	**5,750,000**		

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

10,841Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: **Orange Congregations in Mission –Samaritan Relief Ministry**

Street Address: 300 Millstone Dr. Hillsborough, NC 27278

Mailing Address: 300 Millstone Dr. Hillsborough, NC 27278

Website Address: www.ocimnc.org

Executive Director: (Rev.) Sharon S. Freeland

Telephone: (919) 732-6194 ext. 10 E-Mail: ocimexecdir@embraqmail.com

Contact Person: Kay Stagner, Manager of Client Services

Telephone: (919) 732-6194 ext. 12 E-Mail: ocimsrm@embarqmail.com

Fax: (919) 644-1126 Federal ID Number: 58-1563438

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$25,830	$41,000
Summary of intended use of funds: These funds would be used to purchase food for the Samaritan Relief Ministry food pantry, and emergency assistance for rent and utilities; a portion goes to Support Services, which administratively supports Orange Congregations in Mission, for wages for the program manager.		
Town of Chapel Hill	$	$
Summary of intended use of funds:		
Town of Carrboro	$	$
Summary of intended use of funds:		

Executive Director

Board Chair

Date

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 1981

   b. Years in Operation: 33

   c. Mission or Vision Statement (if applicable):
   Mission Statement: To minister to the urgent needs of citizens of northern Orange County through the volunteer efforts of diverse congregations and individuals inspired by faith in God, and to enhance self-sufficiency and awareness of community resources.

   d. Brief History of Agency: In early 1981, three pastors gathered weekly for Biblical lectionary study. Out of these weekly meetings arose discussions about the human needs of Orange County and ultimately, the idea to meet those needs through the united efforts of local congregations.

   On May 4, 1981, representatives from five Orange County congregations gathered to form an outreach ministry to fulfill their dreams of feeding the hungry, clothing the naked and ministering to the needs of the people who populated the small towns and rural areas.

   Today, with a membership of about 50 congregations, OCIM continues to serve the northern Orange County population. A supportive community and dedicated volunteers help us to accomplish our mission and to maintain our reputation for quick and compassionate responses to human needs in Orange County.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.
   The Samaritan Relief Ministry provides food and emergency financial assistance (rent, utilities, pharmacy) for people living in northern Orange County. Over the years, as the community has grown, the need for emergency assistance has grown. For historical perspective, in 1990 the Samaritan Relief Ministry assisted 4,327 people, 3,009 of those were assisted with food. In 2013, 10,841individuals were assisted, 7,857 of those received assistance from the food pantry. Historically, a 2%-4% increase could be expected annually; 2014 saw a 1% increase over 2013 for total individuals assisted but a 7% increase in people receiving assistance from the food pantry.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

OCIM has decided to separate the Meals on Wheels and Samaritan Relief Ministry applications for Orange County. Historically, one application has been made to include both programs. It is anticipated that by giving each program its own application, a clearer picture will emerge regarding the impact of each of OCIM's programs.

The Samaritan Relief Ministry wants to increase the number of times it can assist households with food from six to eight times in a 12-month period. The program has seen an increase in people requesting food more frequently; there have been more instances of "grace" than ever before. Food stamps just don't stretch as far as they used to due to the high cost of food. Emergency funds had to be requested from the United Way after the 2014 ice-storm and subsequent power outages in Orange County. Without those funds, the Samaritan Relief Ministry would have not been able to meet the needs from that event and the ongoing needs after power was restored. Additional funds would be required to purchase the increase in perishable items such as milk, cheese, eggs and meat.

The program is also hoping to increase the monetary amount available to help households with rent, utilities, and pharmacy as well as reinstating clothing assistance from the thrift shop. The current maximum amount of financial assistance is as much as $100 every six months though it has occasionally been reduced to a maximum of $50 when the program budget is stretched too thin. The Samaritan Relief Ministry has partnered with local congregations when the amount needed is more than a combined effort, including Orange County DSS programs and the client's own resources, can accommodate.

The Samaritan Relief Ministry reimburses the thrift shop when clients receive clothing vouchers. When the program needed to focus more funds on food purchases, it was decided that providing clothing vouchers would be the part of the program to be sacrificed. Requests for clothing continue to come in, especially for children during seasonal changes and at the beginning of the school year. Because of an annual coat drive, requests for coats continue to be honored.

The current rate of assistance has the Samaritan Relief Ministry staff (one full-time, one part-time/14 hours a week) working at full capacity. Any increase in services would require additional staff as well as more volunteers.

The United Way of the Greater Triangle is changing its process for application and funding of agencies. At this time, it is unclear how the services provided by the Samaritan Relief Ministry will fit into the new approach, but it is hoped that with financial ability to increase services, a new staff position could be leveraged. The United Way of the Greater Triangle's application process begins in February 2015.

FEMA funds, used to purchase food, have been delayed.

A portion of the 2012 (Phase 30) allotment was received January 2015. It is anticipated the allotment for 2013(Phase 31) will be arriving sometime in 2015, but we are not going to count on it until it actually arrives. Phase 32 has not been opened up for request at the time of this application.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

-Ongoing fundraisers such as A Walk for Hunger, Russell Wagoner Memorial Softball Tournament, and Souper Bowl Sunday collect funds for the Samaritan Relief Ministry.
Continued funding is anticipated from:
-Town of Hillsborough to assist with water bills;
-Duke Energy to assist with cooling and heating;
-FEMA to assist with food purchases;
-Various denominational offices to assist with food purchases;
-PORCH Chapel Hill and Hillsborough make significant donations of food, monthly.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- **Orange County Department of Social Services:** The Samaritan Relief Ministry receives referrals for individuals and families needing food and emergency financial assistance.
- **Orange County Health Department:** 'WIC' and other maternity/young children related assistance such as food, baby formula and diapers.
- **Lutheran Family Services, RHA and other mental health case management programs:** social workers and case managers refer clients to the Samaritan Relief Ministry for food.
- **Orange County Schools:** Social workers refer students and their families for food. During the holidays some schools hold food drives that are vital to restocking the Samaritan Relief Ministry food pantry.
- **Area Congregations:** Pastors of OCIM member congregations make referrals for food and financial support for people within these congregations. Food is available to people who are initially unaware of Orange County Department of Social Services and choose to go to churches for help. Many donations to the Samaritan Relief Ministry food pantry come through monthly food collections as well as general donations to the Samaritan Relief Ministry. Many of the Samaritan Relief Ministry volunteers come from member congregations.
- **Orange County Sheriff's Department:** During the holidays, the Sheriff's Department makes referrals for individuals and families in Orange County who could use extra help with a traditional Christmas dinner. These are families who may not have previously been identified as needing help. The Sheriff's Department delivers the boxes.

- **Food Bank of Central and Eastern NC:** The Samaritan Relief Ministry receives food at low or no cost.
- **Inter-Faith Food Shuttle:** The Samaritan Relief Ministry receives donations of eggs, produce and other food items bi-weekly.
- **PORCH-Chapel Hill & Hillsborough:** The Samaritan Relief Ministry pantry receives monthly donations of non-perishable food items.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

   The Samaritan Relief Ministry reaches out, not only to our congregations, which are made up of various ethnic and minority groups, but also to the greater northern Orange County community. The Samaritan Relief Ministry makes no distinction regarding service based on ethnicity. The program assists any qualified individual or household needing our services.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition (food pantry)	X	X	X	X
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Rent/Utility/Medication	X	X	X	X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
100% of qualified referrals will receive up to one week of groceries a maximum of six times in 12 months.	Individuals or households are referred to the Samaritan Relief Ministry by Orange County agencies and pastors of OCIM member congregations.	100% of all qualified referrals received food, thus providing 8,446 food-insecure individuals with a week's worth of groceries	A database of clients served is maintained on each household, detailing when and what assistance has been requested and given.
100% of qualified referrals will receive emergency financial assistance to be able to retain housing or utilities an additional 30 days.	Individuals or households are referred to the Samaritan Relief Ministry by Orange County agencies and pastors of OCIM member congregations	Of the 266 households receiving financial assistance for rent or utilities, 100% were expected to remain in their homes with utility service for an additional 30 days.	A database of clients served is maintained on each household, detailing when and what assistance has been requested and given.

If program(s) did not meet its stated goal(s), please explain:

The Samaritan Relief Ministry missed its goal of assisting 300 households with financial assistance for rent or utility by 34 households. In 2015 we will be including those Town of Hillsborough water bills not covered by the Town of Hillsborough's Water Assistance Program. _

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
100% of qualified referrals will receive up to one week of groceries a maximum of eight times in 12-months.	Individuals or households are referred to the Samaritan Relief Ministry by Orange County agencies and pastors of OCIM member congregations.	100% of all qualified referrals will receive food, thus providing 9,726 food-insecure individuals with a week's worth of groceries.	A database of clients served is maintained on each household, detailing when and what assistance has been requested and given.
100% of qualified referrals will receive emergency financial assistance to be able to retain housing or utilities an additional 30 days.	Individuals or households are referred to the Samaritan Relief Ministry by Orange County agencies and pastors of OCIM member congregations	100% of all qualified referrals will receive financial assistance for rent or utility, thus providing 300 households an additional 30 days of housing or utility service.	A database of clients served is maintained on each household, detailing when and what assistance has been requested and given.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **OCIM Samaritan Relief Ministry**

PROGRAM REVENUE		Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations		$ 387,520	$ 290,000	$ 290,000	0%
Program Generated Revenue (fees, fundraising, t/s		$ 65,046	$ 48,125	$ 57,700	20%
Local Government Grants:					
Orange County		$ 25,830	$ 41,000	$ 41,000	0%
Town of Chapel Hill					0
Town of Carrboro					0
Other Local:	Town of Hillsborough Water Assistance	$ 4,894	$ 6,000	$ 6,000	0%
Other Local:					0
Other Local:					0
If more than 3 sources, please provide a separate list.					
Non-Local Government Grants					
Triangle United Way		$ 22,717	$ 27,500	$ 27,500	0%
State Government					0
Federal Government		$ -	$ 9,575		-100%
Other Grants:					0
Other Grants:					0
Miscellaneous/Other Revenue		$ 15,106	$ 18,000	$ 18,000	0%
Please list 3 largest Miscellanous sources:					
Other foundations/groups	$ 9,750.00				
Duke Energy	$ 5,356.00				
Total Program Revenue		**$ 521,113**	**$ 440,200**	**$ 440,200**	**0%**
PROGRAM EXPENSES					
Compensation		$ 12,300	$ 12,448	$ 12,448	0%
Rent & Utilities		$ 10,830	$ 10,300	$ 10,300	0%
Supplies & Equipment		$ 2,266	$ 3,180	$ 3,180	0%
Travel & Training		$ 433	$ 100	$ 100	0%
Other Expenses:		$ 495,284	$ 414,172	$ 414,172	0%
Please list 3 largest "Other Expenses":					
Client Assistance	$ 431,075.00				
Personnel Costs	$ 63,818.00				
Depreciation	$ 391.00				
Total Program Expenses		**$ 521,113**	**$ 440,200**	**$ 440,200**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:		**$ -**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: One household served. This includes all assistance given (food, rent, utility and medication) Households average 2.5 individuals.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	4,379	4,379	$521,113	$119
Estimated FY14-15	4,925	4,925	$440,200	$89.38
Projected FY15-16	4,925	4,925	$440,200	$89.38

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Samaritan Relief Ministry

Client characteristics	Actual 2013-14	*Estimated 2014-14	*Projected 2015-16	***Client characteristics***	Actual 2013-14	*Estimated 2014-15	*Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male (*adult*)	2,554	2,616	2,616	Durham City			
Female (*adult*)	3,861	3,925	3,925	Durham County			
2. **Ethnicity** *(households)*				Raleigh City			
African-American	1,725	1,975	1,975	Wake County			
Caucasian	2,088	2,374	2,374	Town of Chapel Hill			
Hispanic	180	190	190	Town of Carrboro			
Other/unknown	13	13	13	Orange County	10,948	12,313	12,313
3. **Age**				Other (specify)			
0-5 Years	1,568	1,590	1,590				
6-18 Years	3,000	3,371	3,371	Per cent of clients at, or below, federal poverty level	98	98	98
19-50 Years	6,092	7,002	7,002				
51+ Years (*65+*)	288	350	350		10,948		
Unknown				***TOTAL # OF CLIENTS SERVED***		12,313	12,313

*The estimated and projected numbers are based on being able to expand the number of times the pantry is able to serve households from six, up to eight times a year. It is estimated that about 1/3 of the households would request food more than six times.

The data collected from the Samaritan Relief Ministry:
Gender is collected for adults only.
Ethnicity is collected by household.

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Orange Congregations in Mission (OCIM)**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 490,906	$ 395,000	$ 395,000	0%
Agency Generated Revenue (fees)	$ 192,606	$ 225,500	$ 225,500	0%
Local Government Grants:				
Orange County	$ 58,000	$ 58,000	$ 58,000	0%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local: Town of Hillsborough	$ 5,000	$ 5,000	$ 5,000	0%
Other Local: Water Assistance Program	$ 4,894	$ 6,000	$ 6,000	0%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 41,304	$ 42,400	$ 42,400	0%
State Government				0
Federal Government	$ -	$ 9,575	$ -	-100%
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 75,647	$ 115,000	$ 105,425	-8%
Please list 3 largest Miscellanous sources:				
T.M. Kirby Foundation $ 35,000.00				
Anonymous Grantors $ 13,050.00				
Duke Energy Foundation $ 5,355.89				
Total Agency Revenue	**$ 868,357**	**$ 856,475**	**$ 837,325**	**-2%**
AGENCY EXPENSES				
Compensation	$ 128,316	$ 147,095	$ 147,095	0%
Rent & Utilities	$ 40,497	$ 37,050	$ 37,050	0%
Supplies & Equipment	$ 9,411	$ 14,450	$ 14,450	0%
Travel & Training	$ 7,463	$ 7,850	$ 7,850	0%
Other Expenses:	$ 696,181	$ 651,600	$ 651,600	0%
Please list 3 largest "Other Expenses":				
Financial Assistance-Clients $ 453,298.61				
Salaries except Exec. Director $ 168,814.94				
Accounting Fees $ 38,620.00				
Total Agency Expenses	**$ 881,868**	**$ 858,045**	**$ 858,045**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (13,511)**	**$ (1,570)**	**$ (20,720)**	**-1220%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Orange Congregations in Mission

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1	.30	47,045	47,673	47,673		R/H
Manager of Client Services	1	90%	43,444	44,125	44,125		R/H
Meals on Wheels Coordinator	.50	0	11,717	11,970	11,970		
Various hourly employees 2f/t, 5p/t	4.25	.10	113,654	141,232	141,232		2 R/H
Volunteer hours (8,243)	4.25						

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: **Orange Congregations in Mission-Meals on Wheels**

Street Address: 300 Millstone Drive Hillsborough, NC 27278

Mailing Address: 300 Millstone Drive Hillsborough, NC 27278

Website Address: www.ocimnc.org

Executive Director: (Rev.) Sharon S. Freeland

Telephone: (919)_ 732-6194 ext. 10 E-Mail: ocimexecdir@embarqmail.com

Contact Person: Kay Stagner, Manager of Client Services

Telephone: (919) 732-6194 ext. 14 E-Mail: ocimsrm@embarqmail.com

Fax: (919) 644-1126 Federal ID Number: 58-1563438

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$15,170	$17,000
Summary of intended use of funds: Purchase catered meals for Meals on Wheels recipients who are unable to pay the entire amount of the meal; $17,000 would fully subsidize 21 people for a full year.		
Town of Chapel Hill	$	$
Summary of intended use of funds:		
Town of Carrboro	$	$
Summary of intended use of funds:		

Executive Director

Board Chair

Date

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:1981

   b. Years in Operation: 33

   c. Mission or Vision Statement (if applicable):
   Mission Statement: To minister to the urgent needs of citizens of northern Orange County through the volunteer efforts of diverse congregations and individuals inspired by faith in God, and to enhance self-sufficiency and awareness of community resources.

   d. Brief History of Agency:
   In early 1981, three pastors gathered weekly for Biblical lectionary study. Out of these weekly meetings arose discussions about the human needs of Orange County and ultimately, the idea to meet those needs through the united efforts of local congregations.

   On May 4, 1981, representatives from five Orange County congregations gathered to form a outreach ministry to fulfill their dreams of feeding the hungry, clothing the naked and ministering to the needs of the people who populated the small towns and rural areas.

   Today, with a membership of about 50 congregations, OCIM continues to serve the northern Orange County population. A supportive community and dedicated volunteers help us to accomplish our mission and to maintain our reputation for quick and compassionate responses to human needs in Orange County.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.
   The Meals on Wheels program provides a nourishing lunch, five days a week to homebound residents of northern Orange County. The individuals receiving a home delivered meal have no other options for the mid-day meal and for many, the daily visit from the Meals on Wheels volunteer is the only human contact they may have all day. Receiving Meals on Wheels is an important part of the equation to allow seniors to

safely remain in their homes for as long as possible. There has been no increase in cost of meals to recipients in many years, though the cost to the Meals on Wheels program has increased. Actual cost to the program is $3.25 per meal, the cost charged to recipients is $2.80, though individual fees are based on a sliding scale. In 2014, only one person has been able to pay the full $2.80 per meal. Raising the cost for recipients would not be helpful since recipients would still be unable to afford more than they are already paying. Everyone is at least partially subsidized by OCIM.
In the event of impending severe weather, an additional meal of non-perishable items is sent with the understanding that no meal will be delivered if the Orange County Schools are closed due to dangerous road conditions.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.
OCIM has decided to separate the Meals on Wheels and Samaritan Relief Ministry applications for Orange County. Historically, one application has been made to include both programs. It is anticipated that providing a clearer picture of each program will allow for comparable funding for similar programs in Orange County.

The United Way of the Greater Triangle is changing its process for application and funding of agencies. At this time, it is unclear how the Meals on Wheels program will fit into its new approach.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.
Ongoing fundraisers, such as A Walk for Hunger and the Russell Wagoner Memorial Softball Tournament collect funds for both the Meals on Wheels and Samaritan Relief Ministry programs. “A Gift of Love” fundraiser is ongoing and it gives people the opportunity to donate to the Meals on Wheels ministry throughout the year.

5. Give specific examples of your agency’s coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)
   - **Orange County Department of Social Services:** Meals on Wheels receives referrals about possible recipients from Adult Services social workers.
   - **Orange County Department on Aging:** Meals on Wheels receives referrals about possible recipients. Likewise, the Meals on Wheels coordinator makes referrals to the Department on Aging when recipients seem to be in need of other services or there are health or safety concerns.
   - **Various home health agencies:** Social workers, nurses and aides make referrals for clients they feel would be good candidates for Meals on Wheels.
   - **Area Congregations:** Members of area congregations volunteer for Meals on Wheels as well as refer people who may need home-delivered meals.

- **Orange County Employees:** About eight Orange County employees from a variety of departments give up a lunch hour once a month to deliver a Meals on Wheels route.
- **Meals on Wheels Association of America:** OCIM's Meals on Wheels program is a member of the national organization which provides information, training and networking opportunities. "Mayors for Meals" is an event sponsored through MOWAA. This annual event involves mayors from local communities in the delivery of meals on the third Wednesday of March. Through this event, local governments become more aware of Meals on Wheels and the needs of the elderly in our community. Hillsborough's mayor, Tom Stevens, has participated in this event for several years.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?
Meals on Wheels reaches out, not only to our congregations, which are made up of various ethnic and minority groups, but also to the greater northern Orange County community. This program does not make a distinction regarding service based on ethnicity. We assist any qualified individual needing this service.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition		x	x	x
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
A total of 50 people will receive a home-delivered, nutritious meal five days a week.	Referrals are made and Meals on Wheels Coordinator follows up with an initial phone call and if qualifications are met, a home visit is made and meals are initiated.	Of the 70 people who received a home-delivered meal, 100% of this fragile population was able to remain in their own homes and maintain independence for as long as safely possible or until their condition improved.	Information is recorded about dates of referral, interviews and starting service as well as reasons for needing or discontinuing Meals on Wheels. A monthly volunteer calendar is kept and driver recruitment is ongoing.

If program(s) did not meet its stated goal(s), please explain:

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
A total of 73 people will receive a home-delivered, nutritious meal five days a week.	Referrals are made and the Meals on Wheels Coordinator follows up with an initial phone call and if qualifications are met, a home visit is made and meals are initiated.	73 people will be partially subsidized to receive a home-delivered, nutritious meal, enabling this fragile population to remain in their own homes and maintain independence for as long as possible.	Information is recorded about dates of referral, interviews and starting service as well as reasons for needing or discontinuing Meals on Wheels. A monthly volunteer calendar is kept and driver recruitment is ongoing.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: OCIM Meals on Wheels

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 5,210	$ 5,000	$ 5,000	0%
Program Generated Revenue (fees)	$ 14,174	$ 13,500	$ 13,500	0%
Local Government Grants:				
Orange County	$ 15,170	$ 17,000	$ 17,000	0%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 18,587	$ 14,900	$ 14,900	0%
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 3,000	$ 3,000	$ 3,000	0%
Please list 3 largest Miscellanous sources:				
Other foundations/groups $ 3,000.00				
Total Program Revenue	**$ 56,141**	**$ 53,400**	**$ 53,400**	**0%**
PROGRAM EXPENSES				
Compensation	$ 1,040	$ 1,300	$ 1,300	0%
Rent & Utilities	$ 6,957	$ 5,450	$ 5,450	0%
Supplies & Equipment	$ 2,326	$ 4,170	$ 4,170	0%
Travel & Training	$ 470	$ 250	$ 250	0%
Other Expenses:	$ 45,348	$ 42,230	$ 42,230	0%
Please list 3 largest "Other Expenses":				
Client Assistance/meals $ 22,224.00				
Personnel Cost $ 23,114.00				
Depreciation $ 10.00				
Total Program Expenses	**$ 56,141**	**$ 53,400**	**$ 53,400**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: One meal delivered

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	7072	7072	$56,141	$7.93
Estimated FY14-15	7200	7200	$53,400	$7.42
Projected FY15-16	7200	7200	$53,400	$7.42

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Meals on Wheels

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16
1. **Gender**			
Male	22	23	23
Female	48	50	50
2. **Ethnicity**			
African-American	24	25	25
Caucasian	43	45	45
Hispanic			
Other	3	3	3
3. **Age**			
0-5 Years			
6-18 Years			
19-50 Years	1	1	1
51+ Years	69	72	72
Unknown			

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16
4. **Geographic Location(s)**			
Durham City			
Durham County			
Raleigh City			
Wake County			
Town of Chapel Hill			
Town of Carrboro			
Orange County	70	73	73
Other (specify)			
Per cent of clients at, or below, federal poverty level	96	96	96
TOTAL # OF CLIENTS SERVED	70	73	73

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Orange Congregations in Mission (OCIM)**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 490,906	$ 395,000	$ 395,000	0%
Agency Generated Revenue (fees)	$ 192,606	$ 225,500	$ 225,500	0%
Local Government Grants:				
Orange County	$ 58,000	$ 58,000	$ 58,000	0%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local: Town of Hillsborough	$ 5,000	$ 5,000	$ 5,000	0%
Other Local: Water Assistance Program	$ 4,894	$ 6,000	$ 6,000	0%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 41,304	$ 42,400	$ 42,400	0%
State Government				0
Federal Government	$ -	$ 9,575	$ -	-100%
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 75,647	$ 115,000	$ 105,425	-8%
Please list 3 largest Miscellanous sources:				
T.M. Kirby Foundation $ 35,000.00				
Anonymous Grantors $ 13,050.00				
Duke Energy Foundation $ 5,355.89				
Total Agency Revenue	**$ 868,357**	**$ 856,475**	**$ 837,325**	**-2%**
AGENCY EXPENSES				
Compensation	$ 128,316	$ 147,095	$ 147,095	0%
Rent & Utilities	$ 40,497	$ 37,050	$ 37,050	0%
Supplies & Equipment	$ 9,411	$ 14,450	$ 14,450	0%
Travel & Training	$ 7,463	$ 7,850	$ 7,850	0%
Other Expenses:	$ 696,181	$ 651,600	$ 651,600	0%
Please list 3 largest "Other Expenses":				
Financial Assistance-clients $ 453,298.61				
Salaries except Exec. Director $ 168,814.94				
Accounting Fees $ 38,620.00				
Total Agency Expenses	**$ 881,868**	**$ 858,045**	**$ 858,045**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (13,511)**	**$ (1,570)**	**$ (20,720)**	**-1220%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Orange Congregations in Mission

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1	15%	47,045	47,673	47,673		R/H
Manager of Client Services	1	10%	43,444	44,125	44,125		R/H
Meals on Wheels	.50	100%	11,717	11,970	11,970		
Various hourly employees 2f/t, 5 p/t	4.25	0	113,654	141,232	141,232		2 R/H
Agency-wide volunteer hours ~8300	4.25						

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Orange County Disability Awareness Council

Street Address: 503 West Franklin St., Chapel Hill, NC 27516

Mailing Address: 503 West Franklin St., Chapel Hill, NC 27516

Website Address: http://triangledac.org/

Executive Director: Timothy Miles

Telephone: 919.245.4337 E-Mail: ocdac@orangecountync.gov

Contact Person: Timothy Miles

Telephone: 919.245.4337 E-Mail: ocdac@orangecountync.gov

Fax: 919-969-3038 Federal ID Number: 58-2062891

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$4000	$7500
Summary of intended use of funds: Funding for as-needed basic operating expenses, ADA related workshop employment training, human interest projects, resources, supplies, staff training, computer support, travel and printing.		
Town of Chapel Hill	$1000	$7000
Summary of intended use of funds: Funding for as-needed basic operating expenses, ADA related workshop employment training, human interest projects, resources, supplies, staff training, computer support, travel and printing.		
Town of Carrboro	$2500	$5500
Summary of intended use of funds: Funding for as-needed basic operating expenses, ADA related workshop employment training, human interest projects, resources, supplies, staff training, computer support, travel and printing.		

Timothy Miles
Executive Director

Emmanuel Kai-Lewis
Board Chair

23 January 2015
Date

23 January 2015
Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:

   2 February 1999

   b. Years in Operation:

   16

   c. Mission or Vision Statement (if applicable):

   The primary mission is to assist in the implementation of the ADA. This is would be through education, training, and other efforts to identify removal of physical, attitudinal, and other barriers to full inclusion and independence for those with disabilities.

   d. Brief History of Agency:

   OCDAC was originally organized in 1970 as a Mayor's Committee in connection with the Governor's Advocacy Council for Persons with Disabilities. Following the passage of the Americans with Disabilities Act in July, 1990, OCDAC was reorganized as a 501(3) (c) nonprofit education organization and commissioned by the Orange County Commissioners, Mayors of Chapel Hill, Carrboro and Hillsborough NC.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

   - Workshop(s) on disaster preparedness in association with OC EMS, The American Red Cross and Social Services.
   - To some extent, collaborative efforts with OPC and the Orange County Land-trust to address homeownership.
   - Add computer programs.
   - All the Council's efforts in job counseling and training will require collaboration with Job Links partner agencies.
   - OCDAC provides volunteer opportunities for members of A Helping Hand.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

   The DAC provided educational workshops for transit agencies throughout NC . We would like to to get the input from the OPT and CHT providers again. Other providers can also benefit. We saw the need to generate a program for kids who experience visual impairments, needing an outlet to build their outward movement. We have enlisted the assistance of a trained

dance educator who has worked with this population for over 15 years from all cultural backgrounds.

We will plan to offer a customer services and sensitivity awareness programs for HS providers and other businesses throughout our areas.

We will reach out more to the deaf and hard of hearing community as well.

We plan to expand our outreach to social media including Twitter, Facebook, Google+ and YouTube. Elements of which will be incorporated into a redeveloped website.

In order to launch these programs we will be needing updated office equipment (e.g. computer, printer, scanner) additional IT support (e.g. office production software, online collaboration tools, cloud storage) as well as additional paid IT support.

Additional paid office and bookkeeping support will be needed.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

OCDAC currently receives a yearly grant from Southeastern ADA Disability Business Technical Assistance Center (SEDBTAC), including a cash grant for ADA-related programs and expense grants for travel to DBTAC conferences. OCDAC's share of these funds is subject to change, depending upon the number of affiliates applying for grants and their specific project proposals. While OCDAC has received yearly grants from the Triangle United Way, a drop in contributions to that organization has reduced or Revised November 6, 2012 eliminated its funding to some organizations, including OCDAC. The OCDAC is working to maintain its current funding levels from private businesses and to develop new funding sources for the fiscal year 2013-2014 and beyond.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

Our training programs has and is being developed and implemented with the collaboration of T4T, the United Way, the State ADA Office, and various Orange County Offices.

We invite any other social agencies that desire training or consulting concerning implementation of the ADA and customer services to people with disabilities.

We publish a bi annual newsletter and post all events in print and electronic media to the OCDAC website. www.triangledac.org is a major social media source, linking us to organizations such as the NC Housing Coalition and New Hope Project, OPC Mental Health, NC Central Food Bank and Triangle Transit.

We have undertaken collaborative projects in housing for persons with disabilities with Housing and Human Rights and the Center for Economic Justice in Raleigh. We have an ongoing collaborative relationship with UNC Apples, A Helping Hand and Chapel Hill High School - Service Learning and the Jobs Skills Center. We have and plan to expand the use of volunteer UNC-Chapel Hill students and hopefully students from other area colleges. We are also continuing to work on developing a cooperative program with North Carolina Services for the Blind.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

OCDAC prides itself on being one of the most inclusive groups in the disability services arena. We carry a true cross-section of disabilities, by blending race, sex, disability, elderly and kids, where appropriate. This is evident throughout the decision-making process at each meeting, during which the citizens volunteer to carry out assigned activities. For example, outdoor events, designing accessible materials, public speaking, etc.. OCDAC board members come from various professions which greatly emphasize our output of materials and input into the community at large. The Council was awarded the Martin Luther King, Jr. UPS, NOD Community Services and NC Governor's Trophy on awards in the late 1990's for such activities.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X	X	X
Health and Nutrition				
Job Training	X	X	X	X
Sports and Arts Activities	X	X	X	X
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation		X	X	X
Housing		X	X	X
Special Technology Training		X	X	X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Program participants will demonstrate willingness to take positive steps to improve access to public accommodations for persons with disabilities.	ADA Selected Topics Training Workshop	At least ten agencies attended through NC and at least two returning agencies; one professionally documents guide on accessible and NON accessible routes in Chapel Hill Carrboro, and parts of TTA routes were added to the publication.	Each participant will produce a written statement documenting one or more specific actions he/she will take.
To educate Orange County residents about the risks their surroundings can pose as well as preventative measures that can be employed to reduce those risks.	Emergency Preparedness	Partnering with other agencies, identify different types of awards and programs DAC can offer.	A detailed program evaluation will ask participants to identify specific problem solving strategies they learned and plan to apply.
The primary goal of the Fair Housing Act Training and Self-Assessment Program is to provide both housing providers and tenants a comprehensive training opportunity designed to present the complexities of the requirements contained in the Act in an accessible and user-friendly manner	OCDAC Affordable Housing	Estimated 100 persons and 7 different agencies were educated about emergency preparedness, e.g. local first responders, transit, special populations. Each received hands on training, printed and audio visual related data regarding the state and federal regulations	Each program participant will be required to complete an evaluation following the delivery of services. Tenants will be required to complete brief quizzes following each training module. Quiz results will be used to shape the content of the subsequent training module. Housing providers will be asked to complete and return a self-addressed/postage paid postcard included as part of the self-assessment tool. The providers will be asked if they used the tool and if they found it helpful.
Program participants (excluding vendors and providers) will learn about specific assistive technologies that can facilitate education and employment opportunities.	OCDAC Computer classes for visually impaired students	First time this program was offered in latter of first ½ of the fiscal year. Preliminary results show that first set of students learned more from each other in practices; teachers became more aware of the types of blindness and how to instruct better. We increased the number of instructors to 2.	Each student will receive a questionnaire based upon the course materials. They will be graded on what they learned from the class and their homework assignment.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Program participants will demonstrate willingness to take positive steps to improve access to public accommodations for persons with disabilities.	ADA Selected Topics Training Workshop	At least ten agencies attended through NC and at least two returning agencies; one professionally documents guide on accessible and NON accessible routes in Chapel Hill Carrboro, and parts of TTA routes were added to the publication.	Each participant will produce a written statement documenting one or more specific actions he/she will take.
To educate Orange County residents about the risks their surroundings can pose as well as preventative measures that can be employed to reduce those risks.	Emergency Preparedness	Partnering with other agencies, identify different types of awards and programs DAC can offer.	A detailed program evaluation will ask participants to identify specific problem solving strategies they learned and plan to apply.
The primary goal of the Fair Housing Act Training and Self-Assessment Program is to provide both housing providers and tenants a comprehensive training opportunity designed to present the complexities of the requirements contained in the Act in an accessible and user-friendly manner	OCDAC Affordable Housing	Estimated 100 persons and 7 different agencies were educated about emergency preparedness, e.g. local first responders, transit, special populations. Each received hands on training, printed and audio visual related data regarding the state and federal regulations	Each program participant will be required to complete an evaluation following the delivery of services. Tenants will be required to complete brief quizzes following each training module. Quiz results will be used to shape the content of the subsequent training module. Housing providers will be asked to complete and return a self-addressed/postage paid postcard included as part of the self-assessment tool. The providers will be asked if they used the tool and if they found it helpful.
Program participants (excluding vendors and providers) will learn about specific assistive technologies that can facilitate education and employment opportunities.	OCDAC Computer classes for visually impaired students	First time this program was offered in latter of first ½ of the fiscal year. Preliminary results show that first set of students learned more from each other in practices; teachers became more aware of the types of blindness and how to instruct better. We increased the number of instructors to 2.	Each student will receive a questionnaire based upon the course materials. They will be graded on what they learned from the class and their homework assignment.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Orange County Disability Awareness Council**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ -	$ 1,100	$ 2,200	100%
Program Generated Revenue (fees)	$ 2,500	$ 2,500	$ 3,000	20%
Local Government Grants:				
Orange County	$ 3,500	$ 4,000	$ 7,500	88%
Town of Chapel Hill	$ 1,000	$ 3,500	$ 7,000	100%
Town of Carrboro	$ 2,500	$ 2,500	$ 5,500	120%
Other Local: Town of Hillsboro	$ 400	$ 400	$ 1,000	150%
Other Local: ADA Project	$ 650	$ 650	$ 650	0%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
ADA Training Workshops $ 1,075				
IT Materials Sold $ 520				
$ -				
Total Program Revenue	**$ 10,550**	**$ 14,650**	**$ 26,850**	**83%**
PROGRAM EXPENSES				
Compensation	$ 2,000	$ 3,000	$ 4,000	33%
Rent & Utilities	$ 2,000	$ 2,000	$ 3,000	50%
Supplies & Equipment	$ 2,000	$ 3,000	$ 3,500	17%
Travel & Training	$ 1,000	$ 1,500	$ 1,500	0%
Other Expenses:	$ 1,100	$ 1,500	$ 1,500	0%
Please list 3 largest "Other Expenses":				
Business Insurance $ 1,500.00				
$ -				
$ -				
Total Program Expenses	**$ 8,100**	**$ 11,000**	**$ 13,500**	**23%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 2,450**	**$ 3,650**	**$ 13,350**	**266%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]:

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	7	7	$ 1,100	$ 157
Estimated FY14-15	7	7	$ 1,100	$ 157
Projected FY15-16	7	7	$1,600	$ 228

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	90	100	100	Durham City			
Female	160	170	170	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	150	160	160	Wake County			
Caucasian	100	110	110	Town of Chapel Hill	55	55	55
Hispanic	2	5	5	Town of Carrboro	30	30	30
Other				Orange County	15	15	15
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years	25	30	30	Per cent of clients at, or below, federal poverty level			
19-50 Years	160	170	170				
51+ Years	65	70	70				
Unknown				***TOTAL # OF CLIENTS SERVED***			

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Orange County Disability Awareness Council**

	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
AGENCY REVENUE				
Private Donations	$ -	$ 1,100	$ 2,200	100%
Agency Generated Revenue (fees)	$ 2,500	$ 2,500	$ 3,000	20%
Local Government Grants:				
Orange County	$ 3,500	$ 4,000	$ 7,500	88%
Town of Chapel Hill	$ 1,000	$ 3,500	$ 7,000	100%
Town of Carrboro	$ 2,500	$ 2,500	$ 5,500	120%
Other Local: Town of Hillsboro	$ 400	$ 400	$ 1,000	150%
Other Local: ADA Project	$ 650	$ 650	$ 650	0%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
ADA Training Workshops $ 1,075				
IT Materials Sold $ 520				
$ -				
Total Agency Revenue	**$ 10,550**	**$ 14,650**	**$ 26,850**	**83%**
AGENCY EXPENSES				
Compensation	$ 2,000	$ 3,000	$ 4,000	33%
Rent & Utilities	$ 2,000	$ 2,000	$ 3,000	50%
Supplies & Equipment	$ 2,000	$ 3,000	$ 3,500	17%
Travel & Training	$ 1,000	$ 1,500	$ 1,500	0%
Other Expenses:	$ 1,100	$ 1,500	$ 7,000	367%
Please list 3 largest "Other Expenses":				
Business Insurance $ 1,500.00				
Bookkeeper $ 2,500.00				
Administrative $ 3,000.00				
Total Agency Expenses	**$ 8,100**	**$ 11,000**	**$ 19,000**	**73%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 2,450**	**$ 3,650**	**$ 7,850**	**115%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Operating Officer	.5	100	1500	1500	1500	33	
Finance Officer	.5	100	200	200	200	33	
Technology Officer	.5	100	750	750	1000	33	

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Orange County Partnership for Young Children**

Street Address: 120 Providence Road, Suite 101, Chapel Hill, NC 27514

Mailing Address: Same as above

Website Address: www.orangesmartstart.org

Executive Director: Robin Pulver

Telephone: 919-967-9091 E-Mail: rpulver@orangesmartstart.org

Contact Person: Kelly Owensby

Telephone: 919-967-9091 E-Mail: kowensby@orangesmartstart.org

Fax: 919-933-1008 Federal ID Number: 56-1844192

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$2,000	$5,000
Summary of intended use of funds: OCPYC will use these funds to pay for needed staff and contracted services, especially services pivotal to the program, such as the interpreter and agricultural management specialist.		
Town of Chapel Hill	$3,000	$5,000
Summary of intended use of funds: OCPYC will use these funds to pay for needed staff and contracted services, especially services pivotal to the program, such as the interpreter and agricultural management specialist.		
Town of Carrboro	$2,500	$5,000
Summary of intended use of funds: OCPYC will use these funds to pay for needed staff and contracted services, especially services pivotal to the program, such as the interpreter and agricultural management specialist.		

Robin Pulver

Executive Director

January 23, 2015

Date

Board Chair

January 23, 2015

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:

      August 1993

   b. Years in Operation:

      21 years

   c. Mission or Vision Statement (if applicable):

      The mission of the Orange County Partnership for Children (OCPYC) is to ensure that all young children arrive at school healthy and ready to succeed.

   d. Brief History of Agency:

      The Orange County Partnership for Young Children (OCPYC) was founded as a nonprofit agency in 1993 and was the first Smart Start agency in the state. OCPYC has been operating for 21 years with the mission to ensure that all young children arrive at school healthy and ready to succeed. The Partnership serves as the administrator for the Smart Start Early Childhood Initiative and the NC Pre-K program in Orange County. Our programs concentrate on early childhood education, children's health, early intervention, parenting education, and family support. In Spring 2007, OCPYC, concerned with issues of childhood obesity and food insecurity, launched the Healthy Kids Campaign with the start of 3 community gardens that provided gardening, nutrition and outdoor education programming to low-income families, with 90 percent refugee and immigrant families. These became known as the Growing Healthy Kids Community Gardens. In 2010, OCPYC received the Refugee Agricultural Partnership Grant from the Office of Refugee Resettlement allowing 14 refugee families to move from the Growing Healthy Kids community gardens to Triangle Land Conservancy land, forming Transplanting Traditions Community Farm (TTCF). Currently 32 families and over 122 refugee adults and children directly impacted by growing and selling food and participating in programming at TTCF, along with 617 indirectly benefitting through gifting and sharing of vegetables.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Funding for this program would support initiatives that address childhood obesity, food insecurity, and economic instability in Orange County. These issues adversely affect the refugee and immigrant communities in Orange County, specifically in Chapel Hill and Carrboro. North Carolina resettles some of the highest numbers of refugees each year. Although the population of Chapel Hill/Carrboro makes up less than 1% of the total population of N.C., over 10% of the total refugee population from Burma lives in this area. Studies of other refugee and immigrant communities in the U.S. have shown high rates of obesity in resettled refugee children which may be based on stress, food insecurity, caregivers' unfamiliarity with local food culture, poverty and lack of access to familiar food items. The earlier families can be reached, and these barriers addressed, the more successful and healthier families will be. Childhood obesity and weight continue to be prevalent issues in Orange County, statewide and nationally. According to the 2012 North Carolina Nutrition and Physical Activity Surveillance System (NC-NPASS), Orange County had an overweight/obesity rate of 30.1% for children 2-4 years of age. This puts the county 61st overall in overweight percentage and 47th in obesity out of 100 counties. Research shows that weight gain begins within ten years of immigration. (Obesity Among US Immigrant Subgroups Duration of Residence, Goal, McCarthy, Phillips, Wee, JAMA, 12/15/04-VOl 292, No. 23) Transplanting Traditions Community (TTC) Farm strives to address the needs of the entire family through providing a space to grow healthy, culturally appropriate foods and provide educational workshops on nutrition and healthy eating. Access to culturally appropriate fresh food directly impacts the daily diets and health of those involved with the project. Based on data collected in 2013, 95% of refugee farmers with TTC Farm reported their families were able to eat "a lot" more fresh fruits and vegetables as a result of farming with TTC Farm. This is also specifically due to families able to grow culturally appropriate and familiar vegetables that are otherwise hard to find in N.C.

According the U.S. Census, North Carolina has significantly higher food insecurity rates (17.1%) than the national average (14.7%). Over a quarter of minorities, which include refugees and immigrants, are classified as food insecure by the USDA making the work of the TTC Farm crucial. Refugee farmers with TTC Farm are able to both increase supplemental income through selling produce as well as increase fresh fruits and vegetable intake by growing food for their families to consume. In order to make the fruits and vegetables grown on the farm more accessible to the greater refugee and immigrant community TTC Farm began a farm stand in 2013, with a focus on marketing Asian vegetables and herbs. The stand also accepted EBT/SNAP benefits and provided matching coupon dollars in order to encourage shopping at the stand and increase affordability of the produce. Based on data collected in 2013, 95% of farmers reported saving a significant amount of money because of not purchasing groceries after growing with TTC Farm. In addition, families have directly profited from over $70,000 in vegetables sales since 2011.

The TTC Farm focuses on serving low-income families in the refugee and immigrant community. Of the families served at TTCF in 2013-2014, 44 percent were living below the poverty line and the remaining families were low-income. The Farm is designed to collaboratively and comprehensively address the issues of obesity, economic instability and food insecurity. The TTC Farm is located outside of Chapel Hill and Carrboro just 4 miles from the largest refugee neighborhood in the county. The location of the farm allows for increased accessibility and regular attendance to programming directly, correlated to the success of program and significant program growth each year.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

A key operational change and programmatic growth are being considered for the program in FY 2015-16, which will have financial ramifications. OCPYC is in deliberations with the Triangle Land Conservancy to expand TTCF onto additional acreage in order to serve more families eager to participate in the community farm. This expansion will require additional infrastructure to meet the needs of gardeners and additional staff/farm specialist time to manage the start-up and growth of the farm, as well as increased training in agriculture and business development. OCPYC also broke ground in 2014 on a 1/3-acre demonstration "Garden of Tropical Wonders"—a living library of culturally important plants, a community gathering space, and an interactive children's garden. This program element, along with expanded youth and teen programs and leadership development for adults, will increase expectations for potential new staffing.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

In 2014, TTCF farmers collectively earned $35,977 in produce sales. This income went directly back to farmers. Farmers sold produce through newly implemented farmers markets, expanded CSA, sales to neighbors and local Asian markets, restaurants and events. New external revenue for adult and youth education initiatives has been secured from private family foundations and individual donations. Anticipated revenue from private corporate/foundation grants would support farm expansion plans.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- **Triangle Land Conservancy (TLC):** Provides land, infrastructure, and support in expansion. A unique collaboration, the only of its kind between a land conservancy agency and a non-profit educational farm in the state.
- **KCNC (Karen Communities of North Carolina)**: Helping to connect with local refugee families.
- **PORCH (People Offering Relief for Chapel Hill and Carrboro Homes):** TTC Farm both donates and sells produce from the farm to PORCH. PORCH provides service opportunities to teen program
- **Conservation Fund and Resourceful Communities:** Provides strategic planning and fundraising support to TTCF.
- **Carrboro Farmers Market**: Support for teen program and marketing education
- **Chapel Hill Farmers Market:** Support for farm marketing
- **Chapel Hill Carrboro Youth Forward:** Resource and network for other youth orgs
- **Chapel Hill Street Scene Teen Center**: Teen program support

- **CEFS (Center for Environmental Farming Systems) NC FYI (North Carolina Food Youth Initiative):** Teen program support
- **CFSA (Carolina Farm Stewardship Association):** Farm tour and public outreach support
- **RAFI (Rural Advancement Foundation International):** Promotion and support of new farmers
- **UNC Chapel Hill – Nutrition Coalition and School of Public Health and APPLES intern program**: Nutrition education and programming support
- **UNC Chapel Hill – Department of Social Work**: Program evaluation support
- **Carolina Campus Community Garden**-Resources collaboration
- **Duke- Nicolas School of the Environment and Center for Documentary Studies**: Programming collaboration with masters level classes, publicity support
- **Central Carolina Community College Sustainable Agriculture program:** Collaboration with classes
- **NC State University**: Collaboration with agricultural department and classes
- **North Carolina Community Garden Partners**: Networking support, educational collaboration
- **Sacrificial Poets –** Teen program collaboration
- **Chapel Hill Service League** Volunteer and funding support
- **Strowd Roses Foundation**-Volunteer and funding support
- **Lantern Restaurant –** Fundraising and marketing collaboration
- **Panciuto Restaurant -**Fundraising and marketing collaboration
- **Vimala's Curryblossom Café -** Marketing collaboration

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Transplanting Traditions Community Farm staff makes decisions based on the guidance of the participating refugee farm families. 100% of participants are refugees from Burma and all were farmers in Burma before relocating to the U.S. All TTC Farm programs are structured with the goal to teach decision making and leadership development skills, supporting participating farmers to empower themselves to be active community members and leaders. In other words, the work of TTC Farm goes beyond farming and food and strives to build engaged community leaders. The program uses various evaluation tools that engage participants to actively provide feedback including interviews, surveys and facilitated group meetings. The program has grown significantly each year due to the dedication and involvement of the refugee community and largely by word of mouth within the community. The teen program launched in the summer of 2013 was created based on feedback from refugee farmers and youth expressing need for access to more youth leadership development opportunities. The collaboration with the local non-profit Karen Communities of North Carolina and the services of refugee coordinator Eh Tha Pwee are crucial to the legitimacy and success of outreach initiatives in the ethnic and minority communities.

7. Place an “X” in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X		
Health and Nutrition	X	X	X	
Job Training	X	X		
Sports and Arts Activities	X			
Pre-School Activities	X			
After-School Activities	X			
Mentoring	X			
Transportation				
Housing				
Other: Leadership development		X		

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Decrease food insecurity in the refugee and low-wealth communities in Orange County	Increase farm size to allow for 5 additional families to participate; continue educational workshops addressing agricultural topics (see second goal below); continue accepting SNAP EBT cards at the farmers' market	Farm was expanded by one acre (total of 5 acres) and infrastructure was developed to allow 12 additional Asian refugee families into the program; 95% of farmers reported experiencing less stress from participating in the project; 95% of farmers reported saving a significant amount of money on purchased groceries by participating in the project; farmers grew over 30 vegetables and herbs traditional to Burma preserving and sharing cultural heritage and knowledge; farmers grew 2,545 lbs of food in the months of April through June 2014; accepted SNAP/EBT at weekly farm stand	User agreement for land; focus groups and surveys conducted; usage records of SNAP/EBT
Improve economic well-being in the refugee community through agricultural business initiatives and trainings	Provide business planning and marketing education focusing on financial risk management, farm production costs, and developing markets; connect and assist refugee farmers with farmers' markets; conduct CSA	During the growing season, TTCF provided farmers 25 hours of classroom workshops, 72 hours of hands-on farm workshop. Workshops included agricultural risk management, business and market planning, marketing and advertising, food safety, sustainable soil fertility, greenhouse management, crop planning, integrated pest management, sustainable disease control,	Training logs; curriculum materials; attendance records

		seed saving, specialty crop production of ginger, turmeric, and galangal. Over the winter months, TTCF provided an eight-week classroom marketing and business planning course, totaling 32 hours of instruction. From May 2012 to June 30, 2014, farmers profited over $56,000 in vegetable and fruit sales as a result of TTCF education and marketing programs. Eight farmers supplied vegetable and fruit to 40 CSA members.	
Increase communication, job and leadership skills for refugee and immigrant teens	Implement afterschool programming; align youth with community partners for special projects	TTCF provided 5 months of after school programming for Asian refugee teens as well as job training and communication skills development for 8 Asian refugee teens as part of a year round internship program	Attendance records; program implementation schedules
Provide hands-on outdoor active learning and ESL support for refugee and immigrant children	Implement farm-based weekly summer children's program focused on environmental education and science	Implemented 4 week program with 27 young children	Attendance records; program calendars
Provide education and outreach to the greater Orange County community	Provide tours; conduct CSA activities	Conducted 15 tours reaching 462 individuals; 8 farmers supplied vegetables and fruit to 40 CSA members.	Tour log; CSA registration records
Educate at least 25 low-income families with young children about how to grow vegetables	Provide garden community garden plots, gardening education, supplies and materials to participating families	35 families worked in 28 plots at the Growing Healthy Kids Garden in Carrboro; 65 children and teens participated in a "learning about food" workshop	Attendance records

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Decrease food insecurity in the refugee and low-wealth communities in Orange County (80% of participants will report a decrease in food security)	Continue educational workshops addressing agricultural topics (see second goal below); continue accepting SNAP EBT cards at the farmers' market	Over 80% over participants will report a decrease in food security.	Surveys; interviews
Improve economic well-being in the refugee community through agricultural business initiatives and trainings (20 farmers will receive training and technical assistance; 8 will participate in CSA)	Provide business planning and market education focusing on financial risk management, farm production costs and developing markets; connect and assist 8 refugee farmers with 37 CSA customers and 1 refugee farmer with the Chapel Hill Farmer's market; implement a refugee farmer's market in Carrboro and connect 8 refugee farmers with a grassroots marketing outlet	At least 8 farmers will participate in the CSA program, connecting to at least 37 customers. Farmers will earn over $35,000 in supplemental income through the sale of produce.	CSA registration logs; attendance reports; income reports
Increase communication, job and leadership skills for at least 8 refugee and immigrant teens	Implement afterschool programming; align youth with community partners for special projects; conduct trainings	8 teens will participate in the program; teens will collaborate with at least 4 new community partners; at least 4 trainings will be conducted on communication and job readiness	Pre- and post-assessment; attendance rates; individual feedback interviews
Provide hands-on outdoor active learning and ESL support for refugee and immigrant children	Implement farm-based weekly summer children's program focused on environmental education and science	At least 15 refugee children will participate in an 8-week on-farm summer camp focused on healthy eating and living.	Attendance records; program guidelines and materials
Provide education and outreach to the greater Orange County community	Provide tours to the greater community; speak to organizations and participate in community events in order to educate the community about healthy eating and culture in Orange	Over 100 community members will participate in the farm tour program; at least 37 local families will join the CSA and be introduced to new Asian vegetables; at least	Attendance records; CSA registration log; presentation calendars

	County	6 presentations will be given to community members and organizations	
Educate at least 25 low-income families with young children about how to grow vegetables (8 gardeners will receive training in the Growing Communities curriculum)	Provide community garden plots, gardening education, supplies and materials to 25 or more participating families	At least 8 gardeners will receive training in the Growing Communities curriculum; at least 30 families will participate in the community gardens program	Class registration and attendance records; community garden usage
Increase access to fresh food for at least 25 low-income families with young children	Provide plots and technical assistance on growing food and cooking	Families will participate in potluck dinners and cooking classes will be conducted with children.	Attendance sign-in

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Orange County Partnership for Young Children**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 181,195	$ 177,570	$ 177,570	0%
Program Generated Revenue (fees)	$ 1,866	$ 1,829	$ 1,829	0%
Local Government Grants:				
Orange County		$ 2,000	$ 5,000	150%
Town of Chapel Hill	$ 3,000	$ 3,000	$ 5,000	67%
Town of Carrboro	$ 2,500	$ 2,500	$ 5,000	100%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government			$ 9,360	0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 188,561**	**$ 186,899**	**$ 203,759**	**9%**
PROGRAM EXPENSES				
Compensation	$ 87,415	$ 93,600	$ 93,600	0%
Rent & Utilities	$ 3,918	$ 2,000	$ 2,000	0%
Supplies & Equipment	$ 14,025	$ 34,800	$ 44,850	29%
Travel & Training	$ 1,072	$ 2,500	$ 2,500	0%
Other Expenses:	$ 20,760	$ 29,064	$ 50,202	73%
Please list 3 largest "Other Expenses":				
Contracted Services $ 36,670.00				
Land Use and Insurance $ 8,532.00				
Accounting Services $ 5,000.00				

Total Program Expenses	**$ 127,190**	**$ 161,964**	**$ 193,152**	**19%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 61,371**	**$ 24,935**	**$ 10,607**	**-57%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: One educational workshop on small business development and marketing

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	$12.00 per participant x 27 participants	*12 participants	$324	$324/12=$27.00
Estimated FY14-15	$12.00 per participant X 55 participants	*17 participants	$660	$660/17=$38.82
Projected FY15-16	$12.00 per participants X 65 participants	*20 participants	$780	$780/20=$39.00

* Meeting program goal = Marketing produce independently and earning at least $1,000 in one year

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	144	154	162	Durham City			
Female	156	175	184	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	5	5	5	Wake County			
Caucasian	20	20	20	Town of Chapel Hill	143	160	168
Hispanic	70	50	30	Town of Carrboro	125	144	153
Other (Asian)	205	254	291	Orange County	20	25	25
3. **Age**	*			Other (specify)	12		
0-5 Years	10	50	50				
6-18 Years	49	88	88	Per cent of clients at, or below, federal poverty level	44	50	50
19-50 Years	74	171	188				
51+ Years	8	20	20				
Unknown				***TOTAL # OF CLIENTS SERVED***	300	329	346

*Age information for farm families.

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Orange County Partnership for Young Children

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations (Contributions)	$ 196,984	$ 194,013	$ 194,013	0%
Agency Generated Revenue (fees)				0
Local Government Grants:				
Orange County		$ 2,000	$ 5,000	150%
Town of Chapel Hill	$ 3,000	$ 3,000	$ 5,000	67%
Town of Carrboro	$ 2,500	$ 2,500	$ 5,000	100%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government	$ 2,492,802	$ 2,492,802	$ 2,492,802	0%
Federal Government	$ 31,204			0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 6,636	$ 6,503	$ 6,503	0%
Please list 3 largest Miscellanous sources:				
Special fundraising events $ 1,866.00				
Sales Tax Refunds $ 1,252.00				
Other Income $ 3,518.00				
Total Agency Revenue	**$ 2,733,126**	**$ 2,700,818**	**$ 2,708,318**	**0%**
AGENCY EXPENSES				
Compensation	$ 370,214	$ 405,073	$ 429,755	6%
Rent & Utilities	$ 42,042	$ 42,462	$ 42,462	0%
Supplies & Equipment	$ 31,384	$ 32,012	$ 32,012	0%
Travel & Training	$ 15,503	$ 15,813	$ 15,813	0%
Other Expenses:	$ 2,159,812	$ 2,155,682	$ 2,155,682	0%
Please list 3 largest "Other Expenses":				
Contracts and Grants $ 1,965,821.00				
Contracted Services $ 153,004.00				
Other Operating Expenses $ 40,987.00				
Total Agency Expenses	**$ 2,618,955**	**$ 2,651,042**	**$ 2,675,724**	**1%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 114,171**	**$ 49,776**	**$ 32,594**	**-35%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director (FY13-14 Includes former ED salary and payout)	1.00	84%	107,338	94,181	94,181		(R) (H)
Program Manager	1.00	100%	71,148	76,980	76,980		(R) (H)
Office Manager	1.00	48%	56,965	56,580	56,580		(R) (H)
Agricultural Program Manager	1.00	100%	55,674	59,011	59,011		(R) (H)
Agricultural Program Assistant	1.00	100%	31,741	41,665	41,665		(R) (H)
Research Assistant	.25	100%	9,964	5,791	10,000		
Health Check Coordinator	1.00	100%	30,680	37,482	37,482		(R) (H)
Data Entry Assistant	.50	50%	6,704	1,967	0		
Program Coordinator	1.00	100%	0	31,416	53,856		(R) (H)

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.

- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: **Orange County Rape Crisis Center**

Street Address: 1506 E. Franklin Street, Suite 302

Mailing Address: PO Box 4722

Website Address: www.ocrcc.org

Executive Director: Shamecca Q. Bryant

Telephone: (919) 968-4647 E-Mail: Shamecca@ocrcc.org

Contact Person: Shamecca Bryant

Telephone: (919) 968-4647 E-Mail: Shamecca@ocrcc.org

Fax: (919) 968-4677 Federal ID Number: 58-1356356

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$30,000.00	$35,000.00
Summary of intended use of funds: Provide Orange County residents with 24-hour crisis intervention services for survivors of sexual violence. Provide Orange County residents with community education, training, and advocacy about sexual assault prevention. Provide educational programs for students in Chapel Hill-Carrboro Schools and Orange County Schools.		
Town of Chapel Hill	$20,000.00	$27,000.00
Summary of intended use of funds: Provide Chapel Hill residents with 24-hour crisis intervention services for survivors of sexual violence. Provide Chapel Hill residents with community education, training, and advocacy about sexual assault prevention. Provide educational programs for students in Chapel Hill-Carrboro Schools.		
Town of Carrboro	$9,000.00	$10,000.00
Summary of intended use of funds: Provide Carrboro residents with 24-hour crisis intervention services for survivors of sexual violence. Provide Carrboro residents with community education, training, and advocacy about sexual assault prevention. Provide educational programs for students in Chapel Hill-Carrboro Schools.		

Executive Director

Board Chair

1-14-15

Date

1.14.15

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:
   Founded in 1974. Incorporated in 1979.

   b. Years in Operation:
   41

   c. Mission or Vision Statement (if applicable):

   Our mission is to stop sexual violence and its impact through support, education, and advocacy.

   We envision a world free from sexual violence and all other forms of oppression.

   d. Brief History of Agency:

   Founded as a local chapter of the National Organization for Women in 1974 and incorporated as a nonprofit in 1979, the Center commemorated its 40th anniversary in 2014. In our first year of operation, a small group of volunteers supported 7 survivors and community members with a help line run out of one of the founder's homes. Over the past 40 years, we have greatly expanded, now serving over 600 survivors, professionals, and community members annually. Our services include our 24-Hour Help Line, support groups, workshops, and therapy referrals.

   Additionally, we began our Safe Touch program over 30 years ago, offering safety education programs to elementary school students. Our Community Education program has expanded to all ages, offering programs for both raising awareness about sexual violence and teaching prevention skills to over 14,000 youth and adults each year.

   In 2007, we launched our Latino Services program with the hiring of a bilingual and bicultural Latino Services Coordinator. With this full-time position, multiple bilingual staff members, and trained Spanish-speaking volunteers, we are able to provide all our crisis services and education programs in both English and Spanish.

   The Orange County Rape Crisis Center has been a leader in sexual violence response and prevention efforts, providing training and professional consultations for other crisis agencies across the state, collaborating with the state and national coalitions on resource sharing, and presenting our work at national conferences.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). IF MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Program 1: Client Services

The past year has brought national attention to the issue of sexual violence. With media discussions of rape culture, street harassment, sexual assault on campus, and sexual assault in the military, more Americans than ever are aware of the epidemic proportions of sexual violence as well as the severe impact that sexual violence can have on individuals and communities. The 2010 National Intimate Partner & Sexual Violence Survey (NISVS) from the CDC found that 1 in 5 women in the United States are raped in their lifetime. It also found that nearly 1 in 2 women and 1 in 5 men experience some form of sexual violence other than rape, such as sexual coercion, unwanted touch, sexual harassment, and others. Long-term effects of sexual violence may include depression, physical illness, lack of self-esteem, substance abuse, eating disorders, suicidal thoughts and attempts, self-harming behaviors, and more. Many long-term effects can be mitigated if survivors receive early intervention and a supportive environment to disclose their abuse. We provide that environment and support for survivors of sexual violence in our community.

Sexual violence affects all communities, unfortunately, even our own. Over the past four years, the Center has seen a nearly 60 percent increase in the total number of clients we serve annually. It is unlikely that more violence is being committed; rather it is more likely that more survivors are willing to report their abuse and seek assistance. As sexual violence continues to remain a much-discussed topic in the media, this trend will continue. In addition to the increasing number of clients served, we have also seen an increase in the amount of services and time each client receives. For example, in the 2013-2014 fiscal year, the Center served just over 600 clients. However, we had a total of 3,215 contacts during that time, meaning that we saw each client an average of 5.35 times. We provide short- and long-term support, becoming a significant advocate for years throughout each survivor's healing process.

Our expert staff and trained volunteers ("Companions") provide emotional support as well as resources and referrals through our 24-Hour Help Line. Companions are available at all times to provide support and advocacy through active listening, safety planning, suicide intervention, and other crisis intervention techniques. We are also available to accompany survivors to the hospital, to make an official report to the police, and to court appointments. For some high-need survivors experiencing a range of difficulties, we may also provide some level of case management.

We offer support groups throughout the year, including both traditional discussion-based groups as well as innovative activity-based groups that utilize alternative healing techniques. Groups and workshops are integral for long-term healing, as they allow survivors to meet others with similar experiences and draw support from each other. Many survivors have been shamed into silence, being told that their experiences shouldn't be discussed or being blamed for their own victimization. Sharing with others is an invaluable experience, allowing survivors to realize that they are not alone and to support each other in their healing. We held 20 support groups and workshops last fiscal year, some in English and some in Spanish. Nearly 100 percent of our participants reported that their experience with our support groups helped them feel less alone and more supported.

Program 2: Community Education

According to the Darkness 2 Light Coalition, about one in ten children will be sexually abused before their 18th birthday. And as this statistic includes contact-only abuse, we know that even more children will experience other forms of non-contact sexual violence. Sexual violence occurs in all communities and across all demographic groups, and research shows that children and teens are at even higher risk of victimization than adults: 70 percent of all reported sexual assaults occur to children under the age of 18.

In addition to the alarmingly high rates of child sexual abuse, we also know that the negative impacts of abuse can be severe. Children who experience sexual violence may have mental health issues such as anxiety, depression, aggression, or suicidal thoughts; difficulty with interpersonal relationships and sexuality; self-esteem and body image issues; difficulty at school such as poor performance, poor behavior, or poor attendance; physical illness; and more. Without proper support, these difficulties may persist into adulthood. But just as with adults, these long-term consequences can be diminished if children receive early intervention and a supportive environment to disclose their abuse and begin to heal. Further, because offenders often perpetrate in an escalating manner, recognizing inappropriate behavior and intervening early can prevent more severe abuse from occurring. It is therefore crucial that we work both to prevent initial victimization and to identify and provide services to those who do experience violence.

Just as with rape and sexual assault, child sexual abuse occurs in all communities, even our own. The Center has provided safety education programs to local youth and adults for more than 30 years. Our Safe Touch program was innovative and groundbreaking when it first launched, and we have continued to incorporate new research and best practices into our curriculum over the years to ensure that the best information is imparted to our community's students in the best way.

Our Safe Touch program is designed for preschool through fifth grade, focusing on protective factors against victimization. We teach age-appropriate messages for how to identify inappropriate touches, what to do if they experience violence, and who they can talk to about violence. In fourth and fifth grade, we introduce lessons about sexual bullying, internet safety, and cyber-bullying.

Our Start Strong program works in middle and high schools, focusing on risk and protective factors for perpetration of sexual violence, in accordance with primary prevention theory. In keeping with evidence-based best practices, our messages focus on positive behavior development rather than negative behavior abatement as well as on bystander empowerment rather than risk reduction for potential victims. Our programs increase protective factors for youth, including the promotion of healthy sexuality and healthy relationships; the development of media literacy skills; bystander efficacy; challenging rape myths; and developing positive, healthy relationships.

Our adult and parent programs utilize both primary prevention and risk reduction strategies. Our major program is Stewards of Children®, a professional training curriculum provided by the Darkness 2 Light Coalition. Relying on evidence-based methodology, we teach parents and caregivers concrete steps and practical tips for preventing, recognizing, and responding to child sexual abuse.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Program 1: Client Services

Over the past four years, we have seen about a 60 percent increase in the total number of clients served. In addition to serving a greater number of clients, we have also seen an increase in the amount of services and time each client receives. In order to accommodate this growth, we have expanded our volunteer program, having trained Companions provide services during both daytime and overnight shifts. We have also restructured some staff members' job descriptions to accommodate greater time spent with clients. We hope to add an additional part-time staff member to the client services team in order to better meet increased client needs.

Program 2: Community Education

We have had increasing demand for our programs from schools and community groups. We are now in every elementary school in both Chapel Hill-Carrboro City Schools and Orange County Schools, providing Safe Touch programs for all grades, including Head Start and self-contained classes for children with disabilities. We are in a limited number of middle and high school classes across the county, providing Start Strong programs to seventh and ninth grade students, and we hope to expand this program further. We also have had increasing requests for programs from independent and charter schools as well as private groups. We currently have one full-time and two part-time employees on the education team. We hope to expand our capacity by increasing one of those part-time positions to full-time status.

Overall Projected Funding Changes for All Programs

The Center receives about 40 percent our funding from state and state-disseminated federal grants, an amount less than most other agencies within the anti-violence field. With a great deal of legislative change happening at the state level, grant funding has been inconsistent and unpredictable. For example, after losing a $60,000 grant in FY13-14, we received that same grant for FY14-15. We are not sure if we will continue to receive that grant – or others – in the future. Judging from the political climate, we feel we can no longer count on the federal and state funding that we have relied on for 40 years. Though the Center is fortunate to have a diversified funding stream, 40 percent of an approximate $600,000 budget is substantial. Additionally, we expect further funding cuts from United Way, a trend that is worsening each year. We need to further diversify our funding from local sources in order to guarantee the stability and longevity of the public health and safety services we provide.

We continue to seek other funding opportunities and find creative ways to make use of volunteer support, solicit donated items, and establish new fundraising strategies. We remain committed to providing all our programs and services at the same level of quality service, even while our client base continues to grow. As such, we must rely on our community to support our work.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

Programs 1 & 2

- This fiscal year, over 40 percent of our income comes from state and federal grants. We received a competitive two-year grant this fiscal year to fund our Latino Services Program. Though they are competitive, we feel that we are likely to receive state and federal grants from the following sources, all of which are ongoing: VOCA, SASP, RPE, and DHHS. We are guaranteed some state funding through the Sexual Assault Fund. Overall, though most anti-violence agencies are funded very heavily by state and federal grants (typically far more than our 40 percent), our agency has experienced a massive decrease (-$60,000) in our grant funding in FY 13-14, and we are concerned that we may see further cuts in the future as the grant decision-making climate has changed.

- The Center receives a relatively small amount of funding from private foundations, only about 3 percent of our income. An additional 9 percent of our income comes from United Way. In recent years, United Way funding has decreased substantially, and we expect to see further losses. We have multiple small grants that we receive on an ongoing basis. We continue to search for new grant opportunities, though it is increasingly difficult to find private grants that we, as an agency occupying a very specific niche, qualify for.

- Nearly 35 percent of our funding comes from individual contributions and special events. This is a substantial amount, especially compared to similar agencies within the anti-violence field. Through mailing campaigns, donor relations, giving challenges, major special events, and small fundraising events, we rely heavily on community members for support. In November 2014, our annual Holiday Auction raised over $100,000, a record-breaking amount. We hope to continue with that success, expand a second major event that we added last year, and expand our major gifts program.

- We continue to build relationships with and seek support from faith communities, campus organizations, and other local groups. Additionally, we now charge minor fees for out-of-county services to create a new, albeit small, revenue stream.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

Programs 1 & 2

- Local Schools: The Center maintains a close relationship with Chapel Hill-Carrboro City Schools and Orange County Schools. We work with both districts to provide child sexual abuse prevention programs to thousands of children each year. School Health Coordinators from both districts work with Center staff to schedule programs for students and parents. We work closely with school health personnel – such as guidance counselors, school social workers, school nurses, and administrators – to follow up with students who disclose abuse and make referrals to Child Protective Services and other community resources. We also provide programming to a number of independent schools in the region.

- NC Coalition Against Sexual Assault: In FY12-13 and FY13-14, the Center collaborated closely with NCCASA to create a training program to help other agencies establish and maintain comprehensive support group programs. With the Center's support group program as a model, our staff worked together to create a manual, guidelines, and training module. Over the past year, our staff has provided trainings to staff from other anti-violence agencies on implementing the strategies suggested in the manual and instituting best practices for support groups. The Center also partners with NCCASA on other projects; for example, Center staff members often present at the NCCASA Biennial Conference.

- University of North Carolina at Chapel Hill:

    - Since UNC hired their Interpersonal Violence Prevention Coordinator (IVPC) in 2009, we have maintained a strong relationship to assist their work in preventing sexual assault and relationship abuse on campus.
    - Our staff members also sit on the Sexual Assault and Relationship Violence Training and Education Task Force (SARVTAE), which provides education and resources to the UNC community.
    - Following national attention to their handling of campus sexual assault cases, UNC has worked to improve their response to sexual violence as well as their overall system of care for survivors. We have supported their efforts by serving on the Title IX hiring committee, participating in a task force, and providing professional consultations to various campus departments.
    - We have maintained a close relationship with the Dean of Students Office in order to provide services and advocate for students who have been sexually assaulted.
    - We work closely with the Carolina Women's Center in providing appropriate support for students, partnering on community events, and serving on joint committees together.
    - The Center has worked with a number of departments, student groups, and Greek organizations to provide educational programs for raising awareness and preventing sexual violence.
    - The Center has worked with a number of departments and schools at UNC to provide service-learning opportunities for students. With students serving as volunteers and interns, the Center is able to maximize our outreach and services to the community, while students are able to gain invaluable professional experience.

- Sexual Assault Response Team (SART): The Center coordinates the county-wide SART. This team brings together representatives from local law enforcement, the District Attorney's office, UNC Hospitals, UNC-Chapel Hill, and other local agencies to improve the overall community response to survivors when they seek services. The goal is to work together to provide the best system of care for survivors needing services through a variety of local departments. Meeting monthly, the SART receives training, shares experiences, and addresses issues as they arise. The SART has recently instituted a case review process as well.

- The Compass Center for Women & Families: We collaborate with the Compass Center through all our services, referring clients to each other, coordinating shelter services for clients, providing mutual assistance for volunteer training, and conducting joint educational programs. Additionally, a representative from the Compass Center sits on the SART.

- El Centro Hispano: Our Latino Services Coordinator works closely with El Centro in order to improve services to the Latino community. In recent years, the LSC has provided client services and educational programs out of their office, allowing greater outreach to Latinos in our community.

- Third Sector Alliance: Our Executive Director serves on the planning committee for the Orange County Third Sector Alliance, an informal coalition that works to improve the reach of Orange County nonprofits. This position has allowed us to better communicate with area nonprofits and attend trainings for staff.

- Freedom House Recovery Center: We work with the residents of Freedom House to provide support group services to survivors of sexual assault healing from addiction.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Programs 1 & 2

Sexual violence affects people from all demographic groups and all socioeconomic levels. It is present in every community. Furthermore, people who experience sexual violence may experience other forms of violence, discrimination, and oppression based on their identities. For example, a client who has experienced gender-based trauma such as rape may also have experienced violence or discrimination based on their race or sexual orientation. We train our staff and volunteers to understand that each person seeking assistance from us has unique experiences and challenges and therefore unique needs.

In addition to weaving this theme throughout our volunteer training, we also address these issues with the Sexual Assault Response Team. With representatives from different organizations coming together to improve the county-wide system of care, we are able to address challenges facing specific groups. For example, transgender survivors may face discrimination in attempting to access shelter or temporary housing services that are designated for men or women, and undocumented survivors may have limited legal options for reporting an assault. An agency-wide commitment to understanding how these issues intersect with sexual violence allows us to better serve our clients.

Our Latino Services program provides outreach, education, and client support services to the Latino and Spanish-speaking community. We maintain close relationships with local agencies supporting the Latino community. All of our programs and services, including support groups, are provided in Spanish. The success of this program is proven in our service numbers: we have seen a 400% increase in the number of Spanish-speaking clients served in the past four years.

The Center also continues to improve our services for individuals with mental and physical disabilities, who, as research shows, are at an elevated risk for sexual violence. The unique challenges and needs of survivors with disabilities are also discussed during staff and volunteer trainings. In terms of community outreach, our educational staff developed a sexual abuse prevention program for children with disabilities called “Safe Touches Only.” We present these programs to students in self-contained classrooms in local elementary schools.

We collaborate with the LGBTQ Office at UNC-Chapel Hill to ensure that our programs and services are accessible to LGBTQ (Lesbian, Gay, Bisexual, Transgender, Queer) survivors of sexual assault and that LGBTQ-identified individuals are engaged in all aspects of our work. We include information about gender identity and sexual orientation in our volunteer training, explaining connections to sexual and gender-based violence and addressing the special needs of particular groups. Last year we hosted a support group for LGBTQ survivors of sexual violence, and we hope to do so again in the near future.

Within the anti-violence field, men are often thought of as a minority group. Due to lower rates of victimization as well as the added stigma that male survivors face, many men struggle with coming forward to ask for support. We make sure that community agencies, therapists, and partners know that we serve men as well as women, and last year we offered a support group for male survivors of sexual violence.

We continue to reach out to African-American community members via local faith communities. We host a biannual Faith Leaders Breakfast, in which we invite leaders from faith communities across Orange County to join us for a breakfast and an information session about addressing and preventing sexual violence and child abuse in our community.

The Center's Board of Directors hosts a Diversity Committee comprised of Board, staff, and community members. The committee is tasked with improving outreach to underserved populations.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X	X	X
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other: Human Services	X	X	X	X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

Client Services

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
The Center will provide crisis assistance to approximately 673 individuals.	Staff and trained volunteers ("Companions") respond to walk-in clients and to calls on the 24-Hour Help Line. Companions provide emotional support; give resources, information, and referrals; and accompany survivors to medical, legal, and law enforcements appointments. Staff and trained volunteers facilitate support groups and workshops for survivors.	We served a total of 606 clients. 100 of those clients participated in 20 support groups and/or workshops. We held more support groups than the expected 12, which takes more staff time for fewer clients.	Staff and volunteers kept detailed records of each client contact.
Clients who receive services through the Center will report that they have more information about the resources and options available to them. Additionally, they will have gained emotional support as a result of their contact with the Center.	Staff and trained volunteers facilitate support groups and workshops for survivors. Some are traditional discussion-based groups and others are activity-focused groups that utilize alternative healing modalities.	91% of support group participants reported that our groups helped them feel less alone in their experience. 98% of support group participants reported that our groups made them feel more supported in their healing process.	Using a quantitative standardized scale for measuring post-traumatic stress disorder (PTSD) and depression, every client that participated in our support group program was given a pre- and post-test for these symptoms. Participants were also asked to provide qualitative feedback about the service they utilized at the Center, to evaluate their service provider, and to comment on the accessibility of our programs.

If program(s) did not meet its stated goal(s), please explain:

We estimated client numbers based on growth rates from the past few years, but our numbers held steady this past year. Though we had fewer clients than anticipated, we did have a 60% increase in the number of clients served in the past 5 years. Additionally, we now see each client more times on average than we had in the past.

Community Education:

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
The Center will provide educational programs to at least 12,500 individuals in the community.	Safe Touch education programs for elementary school students. Start Strong education programs for middle and high school students. Additional programs for high school students, parents, and adults.	We reached 14,614 youth and adults with safety education and violence prevention programs.	Staff and trained volunteers keep detailed records of each education program.
At least 90% of teachers and counselors in schools that receive Center programs will report an increase in the student awareness of personal safety and protection against sexual violence.	Present Safe Touch education programs for elementary school students in which we: - Teach children to identify safe and unsafe touches - Empower children to set and communicate personal boundaries - Equip children with a safety plan - Assist children in identifying their personal support network of trusted adults - Encourage children to talk with their families about personal safety Respond to those who disclose or otherwise indicate they have experienced sexual violence by meeting their immediate needs and making appropriate referrals.	95% of counselors and 92.5% of teachers reported an increase in the student awareness of personal safety and protection against sexual violence.	For each program within a school setting, the Center provided each teacher and school counselor with an evaluation that asked them to evaluate whether the program resulted in an increased awareness of personal safety and protection against sexual violence among students. Center staff reviewed evaluations periodically and compiled results biannually.

B. FY 2014-15 Programs and Anticipated Outcomes

Client Services

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
The Center will provide crisis assistance to approximately 620 individuals.	Staff and trained volunteers ("Companions") respond to walk-in clients and to calls on the 24-Hour Help Line. Companions provide emotional support; give resources, information, and referrals; and accompany survivors to medical, legal, and law enforcements appointments. Staff and trained volunteers facilitate support groups and workshops for survivors.	We expect to serve at least 600 clients.	Staff and volunteers will keep detailed records of each client contact.
Clients who receive services through the Center will report that they have more information about the resources and options available to them. Additionally, they will have gained emotional support as a result of their contact with the Center.	Staff and trained volunteers facilitate support groups and workshops for survivors. Some are traditional discussion-based groups and others are activity-focused groups that utilize alternative healing modalities.	We expect that more than 90% of those who complete evaluations will: - report that participation in a support group helped them feel less alone in their experience of sexual violence. - report that participation in a support group increased feelings of being supported in their healing process.	Using a quantitative standardized scale for measuring post-traumatic stress disorder (PTSD) and depression, every client that participates in our support group program was given a pre- and post-test for these symptoms. Participants were also asked to provide qualitative feedback about the service they utilized at the Center, to evaluate their service provider, and to comment on the accessibility of our programs.

Community Education

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
The Center will provide educational programs to at least 13,010 individuals in the community.	Safe Touch education programs for elementary school students. Rape Prevention Education programs for middle and high school students. Additional programs for high school students, parents, and adults.	We expect to reach at least 13,010 youth and adults with safety education and violence prevention programs.	Staff and trained volunteers will keep detailed records of each education program.
At least 90% of teachers and counselors in schools that receive Center programs will report an increase in the student awareness of personal safety and protection against sexual violence.	Present Safe Touch education programs for elementary school students in which we: - Teach children to identify safe and unsafe touches - Empower children to set and communicate personal boundaries - Equip children with a safety plan - Assist children in identifying their personal support network of trusted adults - Encourage children to talk with their families about personal safety Respond to those who disclose or otherwise indicate they have experienced sexual violence by meeting their immediate needs and making appropriate referrals	We expect that at least 90% of counselors and teachers will report an increase in the student awareness of personal safety and protection against sexual violence.	For each program within a school setting, the Center will provide each teacher and school counselor with an evaluation that asks them to evaluate whether the program resulted in an increased awareness of personal safety and protection against sexual violence among students. Center staff reviews evaluations periodically and compiles results biannually.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Orange County Rape Crisis Services - Community Education Program

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 93,908	$ 86,652	$ 73,142	-16%
Program Generated Revenue (fees)	$ 460	$ 550	$ 1,000	82%
Local Government Grants:				
Orange County	$ 12,500	$ 15,000	$ 17,500	17%
Town of Chapel Hill	$ 9,000	$ 16,000	$ 17,000	6%
Town of Carrboro	$ 5,000	$ 7,000	$ 8,000	14%
Other Local: Town of Hillsborough	$ 2,500	$ 2,500	$ 2,500	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 18,427	$ 15,000	$ 27,500	83%
State Government	$ -	$ 25,058	$ 25,000	0%
Federal Government	$ 60,200	$ 60,000	$ 60,000	0%
Other Grants: Private Foundation Grants	$ 3,000	$ 11,500	$ 13,000	13%
Other Grants: Contracts (NCCASA)	$ -	$ -	$ -	0
Miscellaneous/Other Revenue	$ 44,469	$ 51,841	$ 54,500	5%
Please list 3 largest Miscellanous sources:				
Holiday Auction Fundraiser (net)	$ 43,694	$ 50,891	$ 52,500	
Misc. (health care tax credit)	$ 775	$ 950	$ 2,000	
non-cash donations				
Total Program Revenue	**$ 249,464**	**$ 291,101**	**$ 299,142**	**3%**
PROGRAM EXPENSES				
Compensation	$ 199,508	$ 214,900	$ 228,250	6%
Rent & Utilities & Insurance	$ 37,994	$ 39,789	$ 40,930	3%
Supplies & Equipment	$ 11,853	$ 23,280	$ 17,450	-25%
Travel & Training	$ 2,973	$ 2,475	$ 2,535	2%
Other Expenses:	$ 8,220	$ 10,657	$ 9,977	-6%
Please list 3 largest "Other Expenses":				
Financial: Audit & accounting fees	$ 6,588	$ 6,425	$ 6,456	
Misc: dues, marketing, other	$ 1,512	$ 2,732	$ 1,821	
Contract Fees & Client Emergency funds	$ 120	$ 1,500	$ 1,700	
Total Program Expenses	**$ 260,548**	**$ 291,101**	**$ 299,142**	**3%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (11,084)**	**$ -**	**$ -**	**0**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Orange County Rape Crisis Services - Client Services Program**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 22,120	$ 22,847	$ 39,858	74%
Program Generated Revenue (fees)	$ -	$ -	$ -	0
Local Government Grants:				
Orange County	$ 12,500	$ 15,000	$ 17,500	17%
Town of Chapel Hill	$ 9,000	$ 4,000	$ 10,000	150%
Town of Carrboro	$ -	$ 2,000	$ 2,000	0%
Other Local: Town of Hillsborough	$ 2,500	$ 2,500	$ 2,500	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 27,662	$ 17,600	$ 7,500	-57%
State Government	$ 67,788	$ 45,450	$ 45,393	0%
Federal Government	$ 73,250	$ 146,456	$ 148,642	1%
Other Grants: Private Foundation Grants	$ 7,000	$ -		0
Other Grants: Contracts (NCCASA)	$ 5,921	$ 12,248	$ 12,248	0%
Miscellaneous/Other Revenue	$ 24,679	$ 23,000	$ 13,500	-41%
Please list 3 largest Miscellanous sources:				
Holiday Auction Fundraiser (net)	$ 19,742	$ 21,500	$ 12,500	
Misc. (health care tax credit)	$ 2,057	$ 1,500	$ 1,000	
non-cash donations	$ 2,880			
Total Program Revenue	**$ 252,420**	**$ 291,101**	**$ 299,141**	**3%**
PROGRAM EXPENSES				
Compensation	$ 199,509	$ 214,900	$ 228,250	6%
Rent & Utilities & Insurance	$ 40,987	$ 42,789	$ 44,095	3%
Supplies & Equipment	$ 9,027	$ 15,980	$ 14,450	-10%
Travel & Training	$ 2,902	$ 6,025	$ 2,965	-51%
Other Expenses:	$ 11,077	$ 11,407	$ 9,381	-18%
Please list 3 largest "Other Expenses":				
Financial: Audit & accounting fees	$ 6,588	$ 6,425	$ 6,456	
Misc: dues, marketing, other	$ 1,087	$ 1,732	$ 975	
Contract Fees & Client Emergency funds	$ 3,402	$ 3,250	$ 1,950	
Total Program Expenses	**$ 263,502**	**$ 291,101**	**$ 299,141**	**3%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (11,082)**	**$ -**	**$ -**	**0**

Section IV.1: Client Services Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: A single service provided to a client (i.e. crisis counseling, medical accompaniment, legal advocacy, support group session, etc.)

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	7625	7625	$263,502	$34.56
Estimated FY14-15	8000	8000	$291,101	$36.38
Projected FY15-16	8500	8500	$299,141	$35.19

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section IV.2: Community Education Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

2) **Define one unit of service**[+]: An individual (youth or adult) participating in one of the Center's educational programs.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	14,614	14,614	$260,548	$17.83
Estimated FY14-15	12,960	12,960	$291,101	$22.46
Projected FY15-16	13,010	13,010	$299,142	$22.99

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V.1: Client Services Program
Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Client Services Program

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	97	87	90	Durham City	n/a	n/a	n/a
Female	489	490	500	Durham County	72	70	60
Unknown	20	30	30				
2. **Ethnicity**				Raleigh City	n/a	n/a	n/a
African-American	24	26	35	Wake County	37	20	30
Caucasian	195	200	200	Town of Chapel Hill	155	165	170
Hispanic	128	75	130	Town of Carrboro	37	39	45
Other	259	306	255	Orange County	24	39	45
3. **Age**				Other (specify): UNC Campus, Chatham, Person, Other NC, Other US, Homeless, Unknown	UNC- 6, Chatham-8, Person- 5, Other NC- 45, Other US- 40, Outside US- 4, Homeless- 36, Unk- 137	UNC- 20; Chatham- 2; Person-2; Other NC- 36; Other US- 46; Outside US- 2; Homeless- 12; Unk- 154	UNC- 27, Chatham-8, Person- 5, Other NC- 25, Other US- 20, Outside US- 4, Homeless- 36, Unk- 145
0-12 Years	1	1	1				
13-17 Years	8	2	5	Per cent of clients at, or below, federal poverty level	unknown	unknown	unknown
18-29 Years	91	82	100				
30-44 Years	95	100	100				
45+ Years	57	62	100				
Unknown	354	360	314	***TOTAL # OF CLIENTS SERVED***	606	607	620

Section V.2: Community Education Program
Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Community Education Program

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**	n/a	n/a	n/a	4. **Geographic Location(s)**			
Male	n/a	n/a	n/a	Durham City	324	600	350
Female	n/a	n/a	n/a	Durham County	77	90	100
2. **Ethnicity**				Raleigh City	135	n/a	n/a
African-American	n/a	n/a	n/a	Wake County	n/a	n/a	n/a
Caucasian	n/a	n/a	n/a	Town of Chapel Hill	6667	5295	5500
Hispanic	n/a	n/a	n/a	Town of Carrboro	2414	2450	2450
Other	n/a	n/a	n/a	Orange County	3931	4050	4150
3. **Age**				Other (specify): UNC Chapel Hill, Chatham County, Unknown	Chatham Co: 72; UNC-CH: 813; Statewide: 181	Chatham Co: 100; UNC-CH: 275; Statewide: 100	Chatham Co: 110; UNC-CH: 250; Statewide: 100
Pre-Kindergarten	562	200	250				
Elementary	9309	9700	9600	Per cent of clients at, or below, federal poverty level	n/a	n/a	n/a
Middle School	884	910	910				
High School	2113	900	1000				
College	617	250	250	***TOTAL # OF CLIENTS SERVED***			
Adult	1129	1000	1000		14,614	12,960	13,010
Unknown							

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Orange County Rape Crisis Center**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 116,028	$ 109,500	$ 113,000	3%
Agency Generated Revenue (fees)	$ 460	$ 550	$ 1,000	82%
Educational programs presented out-of-county				
Local Government Grants:				
Orange County	$ 25,000	$ 30,000	$ 35,000	17%
Town of Chapel Hill	$ 18,000	$ 20,000	$ 27,000	35%
Town of Carrboro	$ 5,000	$ 9,000	$ 10,000	11%
Other Local: Town of Hillsborough	$ 5,000	$ 5,000	$ 5,000	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 46,089	$ 32,600	$ 35,000	7%
State Government	$ 67,788	$ 70,508	$ 70,393	0%
Federal Government	$ 133,450	$ 206,456	$ 208,642	1%
Other Grants: Private Foundation Grants	$ 10,000	$ 11,500	$ 13,000	13%
Other Grants: Contracts (NCCASA)	$ 5,921	$ 12,248	$ 12,248	0%
Miscellaneous/Other Revenue	$ 69,148	$ 74,841	$ 68,000	-9%
Please list 3 largest Miscellanous sources:				
Holiday Auction Fundraiser (net	$ 63,436	$ 72,391	$ 65,000	
Misc. (health care tax credit)	$ 2,832	$ 2,450	$ 3,000	
non-cash donations	$ 2,880	$ -		
Total Agency Revenue	**$ 501,884**	**$ 582,203**	**$ 598,283**	**3%**
AGENCY EXPENSES				
Compensation	$ 399,017	$ 429,800	$ 456,500	6%
Rent & Utilities & Insurance	$ 78,980	$ 82,578	$ 85,025	3%
Supplies & Equipment	$ 20,880	$ 39,260	$ 31,900	-19%
Travel & Training	$ 5,875	$ 8,500	$ 5,500	-35%
Other Expenses:	$ 19,298	$ 22,065	$ 19,358	-12%
Please list 3 largest "Other Expenses":				
Financial: Audit & accounting fees	$ 13,175	$ 12,850	$ 12,912	
Misc: dues, marketing, other	$ 2,600	$ 4,465	$ 2,796	
Contract Fees & Client Emergency funds	$ 3,523	$ 4,750	$ 3,650	
Total Agency Expenses	**$ 524,050**	**$ 582,203**	**$ 598,283**	**3%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (22,166)**	**$ -**	**$ -**	**0**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Orange County Rape Crisis Center

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1.0	45% (1) 55% (2)	73,057	75,930	79,265	14.5%	R,H
Programs Director	1.0	77% (1) 23% (2)	51,048	58,207	55,826	10%	R,H
Crisis Response Coordinator	1.0	100% (1)	44,645	45,447	47,095	8.5%	R,H
Latina Services Coordinator	1.0	90% (1) 10% (2)	44,267	33,250	44,305	8%	R,H
Rape Prevention Education Coordinator	1.0	100% (2)	43,555	44,568	46,447	8.5%	R,H
Education & Finance Coordinator	1.0	12% (1) 88% (2)	39,615	42,808	44,752	8%	R
Education Assistant	.50	100% (2)	13,187	16,053	16,200	3%	R
Development & Marketing Director	1.0	37% (1) 63% (2)	50,850	53,046	55,590	10%	R,H
Administrative Services Coordinator	1.0	65% (1) 35% (2)	25,158	35,782	37,497	7%	R,H
Crisis Response Assistant	.25	100% (1)	8,123	9,850	11,632	2%	R
Volunteer Hours	4.0	50% (1) 50% (2)	0.00	0.00	0.00	0%	n/a

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside AgencyFunding Application
July 1, 2015through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Orange County Literacy Council**

Street Address: 200 N Greensboro Street, Suite C-2, Carrboro, NC 27510

Mailing Address: 200 N Greensboro Street, Suite C-2, Carrboro, NC 27510

Website Address: www.orangeliteracy.org

Executive Director: Alice Denson

Telephone: 919-914-6153 E-Mail: adenson@orangeliteracy.org

Contact Person: Alice Denson

Telephone: 919-914-6153 E-Mail: adenson@orangeliteracy.org

Fax: n/a Federal ID Number: 56-1433933

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$ 12,000	$ 15,000
Summary of intended use of funds: Funds are requested for the Adult Literacy (Adult Basic Education, GED and ESOL) Program, which provides individualized and small group instruction to adult learners who want to improve their reading, writing, basic math, English language and GED preparation skills.		
Town of Chapel Hill	$ 14,000	$ 15,000
Summary of intended use of funds: Funds are requested for the Adult Literacy (Adult Basic Education, GED and ESOL) Program, which provides individualized and small group instruction to adult learners who want to improve their reading, writing, basic math, English language and GED preparation skills.		
Town of Carrboro	$ 3,500	$ 4,000
Summary of intended use of funds: Funds are requested for the Adult Literacy (Adult Basic Education, GED and ESOL) Program, which provides individualized and small group instruction to adult learners who want to improve their reading, writing, basic math, English language and GED preparation skills.		

Executive Director

Board Chair

1.23.2015

Date

1-23-15

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: October 1, 1984

   b. Years in Operation: 30

   c. Mission or Vision Statement (if applicable): Orange Literacy envisions a community where literacy is available to all. Our mission is to help adults reach their education, employment and life goals. We do this by providing free, flexible instruction in reading, writing and basic math, English and computer skills and GED preparation.

   d. Brief History of Agency: Orange Literacy was incorporated 30 years ago and since that time has built a strong and successful record of helping adult learners identify and achieve their short- and long-term goals. Many adult literacy and ESOL students have progressed in their employment goals, such as getting a job, being promoted to a higher-paying job or moving to a new job that pays a higher wage. Other adult learners have achieved their goal of a better education for themselves and their children by passing the GED, developing the literacy skills of their young children and grandchildren, or helping their older children with homework. In addition to Adult Literacy, our flagship program, Orange Literacy offers comprehensive family literacy (in partnership with El Centro Hispano), workplace-based literacy classes at UNC Hospitals and weekly writing workshops at the area homeless shelters.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFICPROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

   Orange Literacy addresses the problem of adult illiteracy in Orange County. Strong literacy skills are fundamental to getting and keeping a well-paying job, which in turn affects the ability to find adequate housing, secure healthcare and develop the resources necessary to care for a family. Although studies vary on the exact number of adults with significant literacy needs in Orange County, most estimate the need to be between 12% and 15% of the adult population. Conservative estimates place the percent of adults (25 years old and older) without a high school diploma or GED at 6.8% and

those who never progressed past the 9th grade at 4%. Further, for young adults between the ages of 18 and 24, 6.5% have not earned a high school diploma or GED and are not enrolled in school (*American FactFinder, 2005-2009* U.S. Department of the Census). These numbers do not take into account the growing number of county residents needing ESOL instruction.

English is not the primary language in approximately 12% of Orange County households; 4.9% of residents report that they do not speak English "very well." In North Carolina, 84% of Latinos report speaking a language other than English at home (*Pew Hispanic Center*). Studies find that almost half of adults classified as Limited English Proficiency (LEP) have nine years or less of education, and 64% do not have a high school degree (*The Language of Opportunity*, 2003). In the United States, 23.5% of all Hispanics and 34% of foreign-born Hispanics have less than a 9th grade education. In Chapel Hill-Carrboro City Schools, only 66.2% of Latino youth graduated from high school in 4 years in 2010, as compared to 92.5% of white students (*2011 Orange County Health Assessment*). Similarly, most Karen/Burmese refugees have had little to no access to formal education and are often unable to read or write in their native language. Many immigrants live in isolation and lack access to community resources due to low education levels and unfamiliarity with U.S. education, health, government, housing, and economic systems.

Between 2000 and 2010, the Orange County Latino population grew by 108.9%. Latinos represent one of the largest minorities in Orange County at 8.2% of the population and substantial portions of the Carrboro (13.8%), Chapel Hill (6.4%) and Hillsborough (6.6%) populations. While Census figures do not track the numbers of Karen/Burmese refugees, surveys conducted by the Orange County Health Department show that for the period between July 2005 and June 2011, 630 (95%) of the 666 new arrivals were from Burma. Further, with in-migration from other states and counties, as well as commuting patterns (sometimes as far away as Rockingham, NC), local agencies and interpreters from Burma estimate the Karen/Burmese population to be about 700-1000 individuals, almost all residing in Chapel Hill and Carrboro (*2011 Orange County Health Assessment*).

In addition, racial and ethnic diversity differs across the county. Hillsborough has the largest percentage (37.1%) of non-white residents, with 29.5% Black residents and 6.6% Hispanic/Latino residents. Orange County's Hispanic/Latino population almost doubled between 2000 and 2010 -- from 4.5% to 8.2% respectively. The highest concentration is in Carrboro, where Hispanics/Latinos comprise 13.8% of the population. And while Orange County's Hispanic/Latino population mirrored that of the state (8.2%), the county's Asian population was almost three times higher: 6.7% for the county compared to 2.2% for the state. The highest concentration of Asians was in Chapel Hill, totaling 11.9% of the population in 2010, up from only 4.1% in 2000 (*2011 Orange County Health Assessment*).

According to data from the National Adult Literacy Survey (NALS), 15% of Orange County adult residents have Level 1 literacy skills (functionally illiterate) and 18% have Level 2 literacy skills (significant literacy needs). The majority of Orange Literacy students are individuals in this group: adults who are not yet ready for GED or even ABE classes, who cannot communicate in English and/or who face multiple barriers to

educational enhancement. Most of our students have *low educational achievement levels*. Many of our students had limited opportunities to attend school, or fell behind in the traditional public school system and never caught up, becoming *public school dropouts* as soon as they were old enough. Non-native speakers face additional challenges. For example, by the time Latino children enter kindergarten, there is already a considerable gap between their reading and math skills and those of children in different socio-economic class and racial/ethnicity groups in the United States (*West, Denton & Germino-Hausken*, 2000; *Reardon*, 2005). This gap widens as children progress through their educational careers (*Rathbun, West, & Hausken,* 2004), leading to inequitable outcomes in high school graduation rates and in subsequent enrollment and completion of higher education.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Our biggest challenge continues to be increasing the percentage of students who make measureable progress, even as the number of students grows. We will continue to look for opportunities to intensify instruction for our core students through special topic workshops, increased use of specialized, level-specific instructional programs and increased use of appropriate technology. We will also continue to look for class/tutoring locations and volunteers to make our programs more accessible to students throughout the county.

Further, over the next several years, we will work with the Family Success Alliance, and other relevant organizations to expand our Family Literacy program and related partnerships in order to replicate our very successful Chapel Hill/Carrboro-based program in multiple locations throughout the county. By partnering with organizations that have proven experience with childhood literacy, and by working with both parents and children, we will better address the problem of multi-generational illiteracy.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

In addition to the funding we receive from Orange County and the towns of Chapel Hill, Carrboro and Hillsborough, we receive funding through the NC Community College System, United Way of the Greater Triangle, private foundations, individual donations, events and various contracts. Orange Literacy will continue to seek support from these funders, as well as develop new sources, including regional and state grants, additional foundation grants and major donors. Orange Literacy is also committed to increasing contributions from private individuals and groups.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencieswhich accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- Orange Literacy holds two twice-weekly classes at **Efland-Cheeks Elementary School** and **Grady Brown Elementary School** and three twice-weekly classes at **New Hope Elementary School** for non-English speaking parents of elementary school students to help them learn to communicate with teachers and school administrators. **Efland-Cheeks, Grady Brown,** and **New Hope** provide space, childcare and student recruitment. Orange Literacy provides intakes, pre- and post-testing, goal-setting, curriculum development, tutor training and support, instruction and instructional materials.

- Orange Literacy provides ESOL and Citizenship instruction to the parents of children attending the **Karen School** (evening program) at **Seawell Elementary School**. **Seawell Elementary** provides space, childcare and student recruitment. Orange Literacy provides intakes, pre- and post-testing, goal-setting, curriculum development, tutor training and support, instruction and instructional materials.

- Orange Literacy collaborates with the other partners of the Skills Development/Job Link Center. We provide and receive client referrals to agencies including **DSS Work First staff, NC Department Commerce-Employment Security Division, Joint Orange Chatham Community Action Agency, Vocational Rehabilitation, Good Work,** and **Disabilities Awareness Council.**

- Orange Literacy works closely with Adult Basic Education (ABE), GED and ESOL instructors from **Durham Technical Community College and Alamance Community College**. We provide tutors for ABE, GED and ESOL students who need individual assistance at DTCC's Skills Development Center site as well as other sites across the county. We also work with Alamance Community College in these same ways for students in northern Orange who choose to go to this school.

- We receive client referrals and self-referrals from human services agencies including:
    - **Freedom House**
    - **Community House**
    - **Project HomeStart**
    - **Orange County Health Department**
    - **Orange County Mental Health**
    - **Horizons**
    - **IFC**
    - **Chapel Hill Housing Authority**
    - **Chapel Hill Carrboro Schools**
    - **Orange County Schools**
    - **El Centro Hispano**
    - **Church World Service**

- A number of area churches, organizations, agencies and businesses provide free space for Orange Literacy programs. These include:
    - **Hillsborough United Methodist Church**
    - **Orange County Public Library**
    - **Carrboro Branch Library**
    - **Chapel Hill Public Library**
    - **UNC-CH.**

- We hold on-going classes at
    - **Robert and Pearl Seymour Senior Center**
    - **PTA Thrift Store** (in partnership with **Chapel Hill/Carrboro HeadStart**)
    - **Chapel Hill Public Library**
    - **UNC Healthcare at Eastowne** (for housekeeping staff)

- Orange Literacy works with **Project Literacy** students (a **UNC Campus Y** program) to tutor University employees, work with ESOL students and volunteer in the Creative Writing Program at the **InterFaith Council's** men's and women's shelters.

- Orange Literacy sources AmeriCorps Members from the **Student Coalition for Action in Student Education (SCALE)** at **UNC's School of Education**.

- With funding from the **Orange County Partnership for Young Children**, Orange Literacy works in partnership with **El Centro Hispano** to provide a comprehensive family literacy program, with instruction for both parents and their pre-school children.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the resultsof the Program(s) to be funded?

   We encourage participation from all segments of the community by reaching out to local community leaders, churches, civic organizations, and businesses. We distribute information about our programs through other organizations, coalitions and agencies, such as Book Harvest, PORCH and the Orange County Health Department. We actively seek partnerships with representatives from communities with high ethnic and minority populations such as UNC and UNC Hospitals-based workers and clients of other Orange County agencies. We are an active partner in the Orange County Skills Development Center, which puts us in contact with a wide cross section of the community. We are regular attendees and active participants in both the Refugee Health Coalition and Latino Health Coalition out of the Orange County Health Department. Orange Literacy is an active participant in the Family Success Alliance and the newly forming zones.

   Further, we have built relationships with the Burmese and Karen refugee community and work with several leaders of that community to tailor programs to their unique needs. We have taken steps to increase our outreach to the African-American and

immigrant communities in northern Orange County. We have increased our outreach to the Latino community through our partnership with El Centro Hispano.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education		x	x	x
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
60% of all students will receive 12 or more hours of instruction.	Staff will work with potential students to complete intake, set goals and pre-test. Students will be either matched with 1:1 tutor or assigned to an appropriate class.	Out of 549 potential students, 62% (342) received 12 or more hours of instruction.	Instructional hours were counted for one-on-one tutoring, classes and time spent working on approved instructional software in monitored computer lab. Hours were tracked in LACES, an online database provided by the NC Community College System.
Of those fulltime students, 60% will make measurable progress on a federally recognized standardized test.	Once a student has reached the prescribed number of instructional hours, s/he will be post-tested using nationally-accepted, standardized tests - either CASAS or TABE.	Of the 342 students receiving 12 or more hours of instruction, 41% (141) made measurable progress.	Progress was tracked in LACES. Progress is defined as increasing one's score on the appropriate post-test.

If program(s) did not meet its stated goal(s), please explain:

Of the 342 fulltime students, 41% made measurable progress. This includes a number of students who were pre-tested, received 12+ hours of instruction, but left the program before they were post-tested. When we examine only those fulltime students who were both pre- and post-tested (209 individuals), 67% made measurable progress.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 14-15	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
60% of all students will receive 12 or more hours of instruction.	Staff will work with potential students to complete intake, set goals and pre-test. Students will be either matched with 1:1 tutor or assigned to an appropriate class.	Out of 575 potential students, 60% (345) will receive 12 or more hours of instruction.	Instructional hours will be counted for one-on-one tutoring, classes and time spent working on approved instructional software in monitored computer lab. Hours will be tracked in LACES, an online database provided by the NC Community College System.
Of those fulltime students, 60% will make measurable progress on a federally recognized standardized test.	Once a student has reached the prescribed number of instructional hours, s/he will be post-tested using nationally-accepted, standardized tests - either CASAS or TABE.	Of the 345 students receiving 12 or more hours of instruction, 60% (207) will make measurable progress.	Progress will be tracked in LACES. Progress is defined as increasing one's score on the appropriate post-test.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Orange County Literacy Council

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 4,160	$ 6,123	$ 10,000	63%
Program Generated Revenue (fees)	$ 4,159	$ 6,122	$ 17,761	190%
Local Government Grants:				
Orange County	$ 12,000	$ 12,000	$ 15,000	25%
Town of Chapel Hill	$ 13,000	$ 14,000	$ 15,000	7%
Town of Carrboro	$ 3,000	$ 3,500	$ 4,500	29%
Other Local: Hillsborough	$ 1,200	$ 1,200	$ 1,200	0%
Other Local: OCPYC	$ 24,766	$ 25,921	$ 24,000	-7%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 36,977	$ 36,892	$ 30,000	-19%
State Government	$ 110,117	$ 114,551	$ 122,368	7%
Federal Government				0
Other Grants: UNC Contracts	$ 36,022	$ 27,660	$ 25,000	-10%
Other Grants: TBD		$ 21,500	$ 21,500	0%
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 245,401**	**$ 269,469**	**$ 286,329**	**6%**
PROGRAM EXPENSES				
Compensation	$ 154,435	$ 179,626	$ 191,789	7%
Rent & Utilities	$ 19,937	$ 26,309	$ 28,380	8%
Supplies & Equipment	$ 20,076	$ 10,000	$ 15,000	50%
Travel & Training	$ 2,498	$ 4,650	$ 5,160	11%
Other Expenses:	$ 48,455	$ 48,884	$ 46,000	-6%
Please list 3 largest "Other Expenses":				
Contract instructors $ 37,161.00				
Misc expenses $ 9,675.00				
Depreciation $ 1,619.00				
Total Program Expenses	**$ 245,401**	**$ 269,469**	**$ 286,329**	**6%**
SURPLUS/(DEFICIT) FOR PERIOD:	$ -	$ -	$ -	0

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: Number of students who attend at least 12 hours of instruction.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost÷ Total Program Units that Met Goal
Actual FY13-14	342	141	$245,401	$1740.43
Estimated FY14-15	345	207	$269,469	$1301.78
Projected FY15-16	345	207	$286,329	$1383.23

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example:A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelteror the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Adult Literacy

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	200	210	210	Durham City	45	0	0
Female	349	365	365	Durham County	0	0	0
2. **Ethnicity**				Raleigh City	6	0	0
African-American	41	45	45	Wake County	3	0	0
Caucasian	47	51	51	Town of Chapel Hill	290	315	315
Hispanic	211	219	219	Town of Carrboro	112	160	160
Other	250	260	260	Orange County	77	100	100
3. **Age**				Other (specify)	16	0	0
0-5 Years	0	0	0				
6-18 Years	1	0	0	Per cent of clients at, or below, federal poverty level	96%	96%	96%
19-50 Years	441	460	460				
51+ Years	107	115	115				
Unknown	0	0	0	***TOTAL # OF CLIENTS SERVED***	549	575	575

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Orange County Literacy Council

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 47,914	$ 32,000	$ 35,000	9%
Agency Generated Revenue (fees)	$ 83,761	$ 65,500	$ 70,000	7%
Local Government Grants:				
Orange County	$ 12,000	$ 12,000	$ 15,000	25%
Town of Chapel Hill	$ 13,000	$ 14,000	$ 15,000	7%
Town of Carrboro	$ 3,000	$ 3,500	$ 4,500	29%
Other Local: Town of Hillsborough	$ 1,200	$ 1,200	$ 1,200	0%
Other Local: OCPYC	$ 51,500	$ 48,000	$ 48,000	0%
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 36,977	$ 36,892	$ 30,000	-19%
State Government	$ 115,913	$ 120,580	$ 128,808	7%
Federal Government				0
Other Grants: UNC Contracts	$ 36,022	$ 27,660	$ 25,000	-10%
Other Grants: TBD		$ 21,500	$ 21,500	0%
Miscellaneous/Other Revenue	$ 88	$ 830	$ 1,000	20%
Please list 3 largest Miscellanous sources:				
Interest Income $ 88.00				
$ -				
$ -				
Total Agency Revenue	**$ 401,375**	**$ 383,662**	**$ 395,008**	**3%**
AGENCY EXPENSES				
Compensation	$ 188,855	$ 212,026	$ 223,008	5%
Rent & Utilities	$ 25,586	$ 30,592	$ 33,000	8%
Supplies & Equipment	$ 23,175	$ 18,230	$ 18,000	-1%
Travel & Training	$ 3,630	$ 5,746	$ 6,000	4%
Other Expenses:	$ 122,055	$ 117,069	$ 115,000	-2%
Please list 3 largest "Other Expenses":				
Contract instructors $ 37,161				
Special Events $ 32,520				
Sub-grant - El Centro Hispano $ 24,579				
Total Agency Expenses	**$ 363,301**	**$ 383,662**	**$ 395,008**	**3%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 38,074**	**$ -**	**$ -**	**0**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined.(i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1	50%	$56,811	$59,083	$61,446	14.8%	R,H
Program Director	1	100%	$40,704	$42,332	$44,025	10.6%	R,H
Program Coordinator - ABE	1	100%	$27,000	$30,000	$33,000	7.1%	R,H
Program Coordinator - ESOL	1	100%	$26,000	$30,000	$33,000	6.7%	R,H
AmeriCorps Members – Fulltime (2)	2	100%	$12,000	$12,000	$12,500	3%	Through AmeriCorps National office
AmeriCorps Members – Minimum Time (1)	.14	100%	$0	$300	$300	.1%	n/a
Instructors (7) (contract)	2.2	100%	$37,161	$45,100	$46,000	9.7%	n/a
Bookkeeper (contract)	.06	0%	$1,237	$0	$3,600	.3%	n/a
Volunteers (120)	5.6	75%	$0	$0	$0	0%	n/a

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Piedmont Health Services, Inc.**

Street Address: 299 Lloyd Street, Carrboro, NC 27510

Mailing Address: 299 Lloyd Street, Carrboro, NC 27510

Website Address: www.piedmonthealth.org

Executive Director: Brian Toomey, MSW

Telephone: (919) 537-7494 E-Mail: toomeyb@piedmonthealth.org

Contact Person: Jen Cunningham

Telephone: (919) 913-1097 E-Mail: cunningj@piedmonthealth.org

Fax: (919) 933-9201 Federal ID Number: 56-0952737

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$10,000	$11,000
Summary of intended use of funds: To support the Carrboro Community Health Center in its mission of being a sliding-fee primary care home for vulnerable and/or economically-disadvantaged residents of Orange County.		
Town of Chapel Hill	$3,000	$4,000
Summary of intended use of funds: To support the Carrboro Community Health Center in its mission of being a sliding-fee primary care home for vulnerable and/or economically-disadvantaged residents of Chapel Hill.		
Town of Carrboro	$2,500	$3,000
Summary of intended use of funds: To support the Carrboro Community Health Center in its mission of being a sliding-fee primary care home for vulnerable and/or economically-disadvantaged residents of Carrboro.		

Executive Director (Brian Toomey)

1/22/15

Date

Karen Barrows

Board Chair (Karen Barrows)

1.22.15

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: May, 1970

   b. Years in Operation: Forty-four years

   c. Mission or Vision Statement (if applicable):

Our mission is to improve the health and well-being of the community by providing high quality, affordable and comprehensive primary health care. Our vision is a health community in which all people have timely access to quality health care.

   d. Brief History of Agency:

Piedmont Health Services, Inc. (PHS) is a key part of this community's health care safety net for vulnerable and/or financially-disadvantaged residents. Founded in 1970 as Orange Chatham Community Health Services, PHS changed its name in 1995 to better reflect its growing service area. As a deemed Federally-qualified health center (FQHC), its primary mission is assuring high-quality, affordable primary care access for low-income populations in the community. All FQHC services are available on a sliding-fee scale for those living below 200% of the Federal poverty level. Like its FQHC colleagues nationally, PHS is overseen by a community Board of Directors, where >50% of Board members are required to be consumers of the organization's services.

The organization has grown substantially over its 44-year history and is one of the largest private, non-profit organizations administratively headquartered in Orange County. PHS now operates eight Joint Commission accredited community health center sites in four counties, including:

• Orange County – Carrboro Community Health Center (est. 1970) (**the subject of this request**)
• Caswell County – rural Prospect Hill Community Health Center (est. 1970)
• Chatham County – rural Moncure Health Center (est. 1970) and Siler City Health Center (est. 2001)
• Alamance County – Charles Drew Health Center, Burlington, NC (est. 1994) and the rural Scott Health Center, Union Ridge, NC (acquired 2001). A new school-based site, Sylvan Community Health Center, opened in Spring 2013, and a school-linked site, Burlington Community Health Center, opened in Summer 2014.

In 2008, as a natural extension of its primary care access mission, PHS launched Piedmont Health SeniorCare, a CMS-deemed Program of All-Inclusive Care for the Elderly (PACE) that focuses on providing a capitated, community-based alternative to nursing home institutionalization for frail elders in Alamance, Caswell, and northern Orange Counties (nearly all participants are dually eligible for Medicare and Medicaid). A second site serving Chatham, Lee, and Orange Counties opened in Pittsboro in early 2014.

PHS continues to be recognized for the quality of the care it provides. This year two of its health center sites received Level 3 Patient-Centered Medical Home status in 2014 under the CMS' FQHC Advanced Primary Care Practice (APCP) Demonstration (remaining CHC sites expected to be recognized this spring pending application). PHS was also recently recognized by HRSA as a Health Center Quality Leader for its demonstrated health outcomes.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). IF MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

As a FQHC, PHS conducts a community needs assessment every five years to assure that its service offerings are meeting identified community needs. The assessment takes into account available County level data and additional state and national data. FQHC programming then seeks to address *access barriers* faced by the community:

- **Financial Barriers – Insurance and Poverty**: Many people in Orange County cannot afford primary medical care and medicines. An estimated 11% of the County population is uninsured, and 31% live below 200% of the Federal poverty level.
- **Cultural/Language Barriers**: Non-English-speaking populations face significant difficulty in finding medical providers with whom they can converse effectively. Many immigrant populations have culturally-determined beliefs about illness and health that differ from mainstream American groups, and these beliefs/practices impact health and health care use. The Latino immigrant population in North Carolina and Orange County has grown exponentially in recent decades, and more recently, Orange County has become home to a sizable group of Burmese refugees.
- **Geographic Barriers**: For many in Orange County, transportation can be a barrier to health care access. We are fortunate to have an excellent free public transportation system, and our Carrboro Community Health Center location on Lloyd Street is purposefully situated a short distance from several bus routes.

Second, FQHCs take a population health focus in developing primary care services that combat documented health care/health status disparities in the populations we serve, disparities which frequently break on economic and racial/ethnic lines, as depicted in the next three tables.

Behavioral Risk Factors, PHS Service Area, 2010

Adult Behavioral Risk (% population)	NC	Orange County	Orange County: White Rate	Orange County: Non-White	Orange County: Household Income < $50,000
Smoke	19.8	13.3	12.2	16.7	15.8
Overweight/obese	65.3	53.2	46.2	75.2	69.6
No exercise past month	25.7	15.4	12.8	23.5	22.3

Source: State Center for Health Statistics. (2010). *Behavioral Risk Factor Surveillance Survey (BFRSS), 2010.* Raleigh, NC: NCDHHS.
Note: 2010 is the last year NCDHHS provided County-specific data (now reported regionally).

Chronic Disease Prevalence Among Adults, PHS Service Area: 2009 - 2010

Chronic Disease (% Adult population)	NC	Orange County	Orange County: White Rate	Orange County: Non-White	Orange County: Household Income < $50,000
Cardiovascular Disease[1]	9.0	4.6	4.8	4.2	5.5
Hypercholesterolemia [2]	40.0	32.3	34.6	25.0	32.4
Diabetes[1]	9.8	5.2	3.5	10.5	8.9
Hypertension[2]	31.5	25.8	22.5	31.7	25.4
COPD[2]	5.6	3.4	4.3	0.9	3.8
Asthma[1]	7.5	18.2	18.3	17.8	24.7

Sources: 1) State Center for Health Statistics. (2010). *Behavioral Risk Factor Surveillance Survey (BFRSS), 2010*, Raleigh, NC: NCDHHS; 2) State Center for Health Statistics. (2009). *Behavioral Risk Factor Surveillance Survey (BFRSS), 2009*, Raleigh, NC: NCDHHS.
Note: 2010 is the last year NCDHHS provided County-specific data (now reported regionally).

PHS Service Area Mortality: 2009-2013

Age-Adjusted Morality Rates per 100,000 pop. (2009-2013)	Orange County	Orange County: White Rate	Orange County: African American Rate
Selected Leading Causes of Death			
All Causes	645.3	633.6	866.0
Heart Disease	123.3	121.3	158.4
Cerebrovascular Disease (Stroke)	32.9	32.3	45.6
Cancer	156.1	151.7	210.7
Diabetes	11.4	8.4	33.2
Kidney Disease	10.4	6.9	33.5
Chronic Lower Respiratory Disease	26.2	28.9	N/A*
Suicide	12.4	15.1	N/A*
Alzheimer's Disease	27.4	28.4	N/A*

***** Note mortality rates for other races not calculable due to small numbers.
Source: State Center for Health Statistics *2015 County Health Data Book*, Raleigh, NC: NCDHHS.

In addition to overall behavioral risk, chronic disease, and mortality statistics, our health center model must address the preventive health needs of the community, which include the need for timely access to quality prenatal care, family planning, oral health and wellness services (screening/immunization), as well as the needs of the community for acute illness care.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

CCHC plans to continue to provide "one-stop shop access" to comprehensive primary health care for people of all ages in FY2015-2016. The center is open Monday-Saturday, including evening hours on Monday and Thursday. Services include family practice medical care with 24 hour access to medical advice; full-scope family dentistry; comprehensive affordable pharmacy made available through our participation in the Federal 340B drug pricing program; WIC Supplemental Nutrition Program and medical nutrition therapy; care management; and outreach services including Health Insurance Marketplace outreach and enrollment assistance. All services are available in the Spanish language, and the Center also offers Burmese interpretation services. In terms of recent innovations, in its efforts to enhance chronic disease management, the Center continues to pilot group diabetes visits. The Center has also implemented UNC's Baby Oral Health Program model, outreaching to WIC and medical departments to educate caregivers about young children's oral health needs, providing oral exam and fluoride varnish, and encouraging the establishment of a regular dental home for preventive services. PHS remains grateful for the dollars provided by this process, which support the medical program.

There are no major operational/financial changes anticipated for the Carrboro Community Health Center operations/programming this year, given high demand for appointments at CCHC, Piedmont Health is interested in pursuing viable funding opportunities to expand services in the region as they present themselves, and applied for Federal funding from the HRSA Bureau of Primary Health Care for a second Orange County health center site in April (pending, announcement expected in May 2015).

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

FQHCs are expected to maintain well-diversified funding portfolios that include local community investment, private, state and Federal grant support, and revenue generated from patient care. In a state without a Medicaid expansion, North Carolina FQHCs continue to serve an exceptionally large number of low-income uninsured patients when compared to FQHCs nationally. Sliding fees collected from these patients do not fully cover the cost of care, and this cost is not fully covered by our Federal grant. Thus, outside support is key to sustaining our mission in the community and the reason for this request.

Currently, patient care revenue (from third party payers and patient out-of-pocket fees) represents over 79% of the PHS total operating budget. Twelve percent of the operating budget comes from the Federal section 330(e) community health center grant, which is an ongoing source of program support. The remainder is from other grants and contracts. PHS holds the state WIC contract for Orange/Chatham County which represents on-going grant-funded support. Other external sources of support for Carrboro CHC are grants from 1) UNC Health Care that supports our Carolina Health Net program for the Uninsured, 2) Orange County Partnership for Children which supports our Bilingual Child Resource Coordinator position, and 3) the Strowd Roses Foundation which supports our Reach Out and Read literacy program with our young medical patients (see further descriptions in question 5). Most of these opportunities are competitively renewed like this Human Services Outside Agency funding process. PHS'

program development team continues to aggressively pursue available local, state, and private sector funding to help it fulfill its community health access mission. Importantly, the Orange County/Chapel Hill/Carrboro support, while a small portion of our agency's overall operating budget, is critical to demonstrating community support for our organization, support that is often key to winning state, federal and private support from other funders.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

PHS has a long track record for strategic partnerships with outside agencies to accomplish its health care access mission. A few of our partnerships involving the Carrboro Community Health Center include:

- **Orange County Health Department: the Orange County Health Department administrates this grant award with Piedmont Health, and reports its outcomes directly to the Health Director**. Piedmont Health staff is involved in the County's needs assessment process and supplying data on our patient populations. Our medical program collaborates closely with the Orange County Health Department to care for the Burmese refugee population. Carrboro CHC now has full time Burmese interpreters on our team to care for this group. Again, PHS has the Orange County and Chatham County State WIC contract and oversees this program at four PHS health center sites as well as the Orange County Health Department. In 2013-2014, Piedmont Health and the Department collaborated on a Susan G. Komen NC Triangle to the Coast Affiliate-funded mammography program for low-income uninsured women, a program that both organizations seek to continue during the 2015-2016 project period.
- **Chapel Hill/Carrboro and Hillsborough Chambers of Commerce:** PHS began the Small Business Health Care Initiative to offer Chamber members' uninsured employees (or those with high deductible plans) an affordable source of primary health care at Carrboro Community Health Center.
- **UNC SHAC Free Clinics:** PHS provides its Carrboro Community Health Center facility and the technical assistance of its Directors in realizing the UNC SHAC Free Clinic (operates on Wednesday evenings).
- **Interfaith Council on Social Services IFC Homeless Shelters:** The Carrboro Community Health Center is a referral site for homeless residents in Orange County who have chronic medical problems, and we participate in the annual Project Homeless Connect program. Newly, PHS will be operating the health services provided at the new shelter once it is completed later this spring/summer.
- **AccessCare Inc. (Medicaid Network):** PHS is a major partner in its regional Community Care of North Carolina Program charged with case managing the Medicaid population of Alamance, Caswell, Chatham, and Orange Counties. The Medicaid network includes all area 'safety-net' health care providers (hospitals, community health centers, health departments, departments of social services) in addition to the private practice community serving Medicaid clients and works collaboratively on quality initiatives to better serve the population.
- **UNC Health Care:** Piedmont Health is a training location for many students from UNC health professional schools (e.g. medical, dental, pharmacy, nutrition, public health) Similar to the Chamber of Commerce program, Piedmont Health created the "Carolina

Health Net" program with UNC Health Care to triage the primary care unassigned uninsured of our service area identified at UNC to a primary care home at PHS.

- **Orange County Partnership for Children:** The Partnership funds a Bilingual Child Resource Coordinator as part of our CCHC program who focuses on coordinating primary care services for immigrant/refugee children age 0-5 years.
- **El Futuro, Inc.** PHS has a long history of collaboration with El Futuro, a local mental health non-profit that serves a significant portion of its patient population. Newly, PHS is collaborating with El Futuro leadership to begin to develop an integrated behavioral health model at PHS.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

Community Health Centers nationally have the common goal of trying to guarantee "100% health care access and 0% health care disparities" to the communities they serve. Piedmont Health Services is committed to offering high-quality, accessible care to minority communities in its service area, and its current Carrboro Community Health Center patient population is approximately 68% Latino, 9% African American, and 7% Asian. Specific to the Latino population, approximately 75% of PHS medical and dental providers and 40% of other staff are Spanish-bilingual (with many bi-cultural staff), and we pride ourselves on offering culturally-competent care to this large immigrant population. PHS frequently participates in various outreach events and advertises in various minority-targeted publications. It also has a community outreach focus on the African-American faith-based community in Orange County.

Importantly, PHS strives to maintain Board and staff reflective of its diverse patient population. Its current Board membership of 14 includes 7 Whites, 3 African-Americans, and 4 Hispanics. PHS reported the race/ethnicity of 360 employees to the EEOC in September 2014 and the distribution was 44% White, 31% Black, 20% Hispanic/Latino, 3% Asian, and 2% other.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition	X	X	X	X
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Provide timely access to high-quality, comprehensive primary care to over 3,400 vulnerable and/or financially disadvantaged residents (<200% of Federal poverty level) of Chapel Hill/Carrboro/Orange County.	Funding was used as provider salary support for uncompensated medical care at the Carrboro Community Health Center.	3,818 residents of Chapel Hill/Carrboro/Orange County were served at the Carrboro Community Health Center. (4,952 Orange County residents were served across our system.)	PHS' electronic practice management system generates reports demonstrating the number and demographics of individuals served at the health center.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Provide timely access to high-quality, comprehensive primary care to over 3,400 vulnerable and/or financially disadvantaged Orange County residents (<200% of Federal poverty level.	Funding will be used as provider salary support for uncompensated medical and dental care at the Carrboro Community Health Center.	Over 3,400 residents of Chapel Hill/Carrboro/Orange County will receive primary care services at the Carrboro Community Health Center.	PHS' electronic practice management system generates reports demonstrating the number and demographics of individuals served at the health center.

Section III. Program Budget
(Excel file)

AGENCY NAME: Piedmont Health Services, Inc.: Carrboro Community Health Center

PROGRAM REVENUE	Actual FY2013	Estimated FY2014	Projected FY2015	Percent Change
Private Donations		$ -	$ -	0
Program Generated Revenue (fees)	$ 3,078,048	$ 3,072,522	$ 3,181,495	4%
Local Government Grants:				
Orange County	$ 10,000	$ 10,000	$ 10,000	0%
Town of Chapel Hill	$ 3,000	$ 3,000	$ 3,000	0%
Town of Carrboro	$ 2,000	$ 2,500	$ 2,500	0%
Other Local: Orange Partnership/Smart Start	$ 37,300	$ 30,000	$ 40,000	33%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -	$ -	$ -	0
State Government	$ 771	$ 6,990	$ -	-100%
Federal Government	$ 458,700	$ 411,650	$ 460,607	12%
Other Grants: Non-Gov't Grants	$ 139,983	$ 210,529	$ 339,500	61%
Other Grants:				0
Miscellaneous/Other Revenue	$ 73,460	$ 44,971	$ 178,844	298%
Please list 3 largest Miscellanous sources:				
Patient Information $ -				
Management Fees $ -				
$ -				
Total Program Revenue	**$ 3,803,262**	**$ 3,792,162**	**$ 4,215,946**	**11%**
PROGRAM EXPENSES				
Compensation	$ 3,137,017	$ 3,177,705	$ 3,008,135	-5%
Rent & Utilities	$ 77,060	$ 70,156	$ 107,013	53%
Supplies & Equipment	$ 418,239	$ 420,562	$ 385,609	-8%
Travel & Training	$ 25,562	$ 29,667	$ 23,100	-22%
Other Expenses:	$ 735,467	$ 730,580	$ 959,873	31%
Please list 3 largest "Other Expenses":				
Patient Care $ -				
Contract Services $ -				
Repairs/Maintenance $ -				
Total Program Expenses	**$ 4,393,345**	**$ 4,428,671**	**$ 4,483,730**	**1%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (590,083)**	**$ (636,509)**	**$ (267,784)**	**58%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: The HRSA Bureau of Primary Health Care defines a health center patient as an individual who receives a visit from a licensed independent provider. In the case of PHS, this includes individuals making a medical and/or dental primary care visit at one of our health center sites. Our other services (e.g. case management, pharmacy, nutrition) are provided as an enhancement to the provider visit. Thus, the **primary care visit (medical or dental) is the appropriate unit of service for Carrboro Community Health Center**.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13	26,663 primary care visits (21,201 medical + 5,462 dental)	26,663	$4,316,005	$161.87
Estimated FY14	25,668 Primary care visits (20,545 medical + 5,123 dental)	25,668	$4,161,541	$162.13
Projected FY15	26,640 primary care visits (estimated 21,640 medical + 5,000 dental)	26,640	$4,016,468	$150.77

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000)

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Carrboro Community Health Center Patient-Centered Primary Care Home

Client characteristics	Actual CY2013+	Estimated CY2014+	Projected CY2015*	*Client characteristics*	Actual CY2013+	Estimated CY2014+	Projected CY2015*
1. **Gender**				4. **Geographic Location(s)**			
Male	2,763	2,704		Durham City	1,666	1,636	
Female	4,113	4,070		Durham County *(does not include Durham City)*	142	135	
2. **Ethnicity**				Raleigh City	88	53	
African-American	614	591		Wake County *(does not include Raleigh City)*	158	111	
Caucasian	738	733		Town of Chapel Hill	2,092	2,078	
Hispanic	4,681	4,533		Town of Carrboro	1,312	1,277	
Other	843	917		Orange County *(does not include Town of Chapel Hill or Town of Carrboro)*	104	373	
3. **Age**				Other (specify)	1,314	1,111	
0-5 Years	1,224	1,135					
6-18 Years	1,740	1,820		Per cent of clients at, or below, federal poverty level	67.5%	59.7%	
19-50 Years	2,814	2,712					
51+ Years	1,098	1,107					
Unknown	0	0		***TOTAL # OF CLIENTS SERVED***	6,876	6,774	

+ PHS reports patient demographic characteristics on a calendar year basis to our Federal funders.

*****PHS does not routinely predict patient mix by gender, race/ethnicity, age, or geographic location, instead basing our budget on predicted payer mix. FY2015 budget goal is estimated at 21,640 medical visits and 5,000 dental visits. We would expect little if any change in CY2015 in terms of patient characteristics compared to prior years. Please note: Patients from Orange County are served by all eight PHS health center locations, and in CY2014 had the following geographic distribution: Durham City: 1,919; Durham County: 166; Raleigh City: 414; Wake County: 1,122; Town of Chapel Hill: 2,169; Town of Carrboro: 1,317; Orange County: 1,306; Other: 25,859; Total patients served: 34,272. Final CY2014 data will be available summer 2015.

Section VI: Comparative Budget for Entire Agency

AGENCY NAME: Piedmont Health Services, Inc.

AGENCY REVENUE	Actual FY 2013	Estimated FY2014	Projected FY2015	Percent Change
Private Donations	$ 24,412	$ 48,798	$ -	-100%
Agency Generated Revenue (fees)	$ 25,641,764	$ 27,652,500	$ 35,086,631	27%
Local Government Grants:				
Orange County	$ 10,000	$ 10,000	$ 10,000	0%
Town of Chapel Hill	$ 3,000	$ 3,000	$ 3,000	0%
Town of Carrboro	$ 2,000	$ 2,500	$ 2,500	0%
Other Local: Orange Partnership/Smart Start	$ 37,300	$ 30,000	$ 40,000	33%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -	$ -	$ -	0
State Government	$ 58,882	$ 51,365	$ 821,568	1499%
Federal Government	$ 6,559,310	$ 7,856,097	$ 5,620,972	-28%
Other Grants:	$ 1,891,592	$ 1,749,874	$ 2,216,935	27%
Other Grants:				0
Miscellaneous/Other Revenue	$ 529,429	$ 326,893	$ 550,117	68%
Please list 3 largest Miscellanous sources:				
Patient Management Fees $ -				
Technical Assistance $ -				
Board Fundraiser $ -				
Total Agency Revenue	**$ 34,757,689**	**$ 37,731,028**	**$ 44,351,723**	**18%**
AGENCY EXPENSES				
Compensation	$ 22,147,843	$ 23,361,945	$ 26,001,993	11%
Rent & Utilities	$ 757,072	$ 750,366	$ 1,570,894	109%
Supplies & Equipment	$ 3,307,243	$ 3,258,542	$ 3,187,844	-2%
Travel & Training	$ 293,434	$ 394,203	$ 313,706	-20%
Other Expenses:	$ 8,662,379	$ 9,846,263	$ 13,277,286	35%
Please list 3 largest "Other Expenses":				
Patient Care $ -				
Repairs/Maintenance $ -				
Contracted Services $ -				
Total Agency Expenses	**$ 35,167,971**	**$ 37,611,318**	**$ 44,351,723**	**18%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (410,282)**	**$ 119,710**	**$ -**	**-100%**

Revised November 20, 2014

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Piedmont Health Services, Inc.

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual FY2013	Estimated FY2014	Projected FY2015	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Medical Provider: Physicians (CCHC: 3.170)	22.215	0.08	$3,985,664	$3,372,038	$3,085,713	7%	See notes at bottom of next page
Medical Provider: FNP/CNM/PA (CCHC: 2.750)	18.310		$1,086,307	$1,052,790	$1,279,983	3%	See notes at bottom of next page
Nurses: RNs (CCHC: 2.000)	27.400		$1,372,597	$1,148,725	$1,312,023	3%	See notes at bottom of next page
Enabling Services (Case managers, outreach, eligibility assistance) (CCHC: 4.000)	28.675		$944,851	$853,898	$1,152,427	3%	See notes at bottom of next page
Dentist (CCHC: 1.436)	4.750		$749,785	$872,146	$835,433	2%	See notes at bottom of next page
Dental Hygienist (CCHC: 0.625)	3.000		$155,494	$150,965	$183,068	0.4%	See notes at bottom of next page
Dental Assistants/PCCs (CCHC:_ 4.400)	19.900		$529,958	$637,753	$524,746	1%	See notes at bottom of next page
WIC/Nutrition (CCHC: 4.850)	22.625		$1,131,575	$1,024,884	$978,988	2%	See notes at bottom of next page
Pharmacist & Pharmacy Technicians (CCHC: 5.125)	37.228		$1,869,132	$1,800,520	$2,179,900	5%	See notes at bottom of next page
Other Medical Personnel (MA, Rehab. Staff) (CCHC: 6.000)	44.663		$1,536,812	$1,519,336	$1,497,625	3%	See notes at bottom of next page
Patient Support Staff (non-clinical) (CCHC: 10.800)	97.870		$2,878,978	$2,766,176	$3,292,473	7%	See notes at bottom of next page
Central Administration & Management	64.025		$3,868,302	$3,429,175	$4,646,969	10%	See notes at bottom of next page

Total Personnel Salaries (CCHC: 40.306)	390.661		$20,109,455	$18,628,406	$20,969,348	47%	
Benefit Package cost for FY 2015 (24% of salary cost)					$5,032,645	11%	
TOTAL BUDGET FOR FY 2015					$44,351,723		
VOLUNTEER HOURS+	See Table Notes below	See Table Notes below	See Table Notes below	See Table Notes below	See Table Notes below		

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Table Notes:

Benefits: PHS offers employees who work more than 60% time a benefit package which includes health and retirement plan (with PHS contribution of 3% for the first 3% contributed by the employee). As of this submission, 320 PHS employees participate in the health plan and 278 are enrolled in our 403(b) retirement plan.

Volunteers: PHS has an all-volunteer Board of Directors. PHS does not track or record volunteer hours. At clinical sites, because of the risks inherent in clinical environments, PHS generally limits unpaid staff to health professional students who are actively engaged in pursuing their education and meet our stringent employee health guidelines.

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Piedmont Wildlife Center**

Street Address: 364 Leigh Farm Road

Mailing Address: Durham, NC 27707

Website Address: www.piedmontwildlifecenter.org

Executive Director: Gail Abrams

Telephone: 919-489-0900 E-Mail: director@piedmontwildlifecenter.org

Contact Person: Gail Abrams

Telephone: 919-489-0900 E-Mail: director@piedmontwildlifecenter.org

Fax: 919-493-0988 Federal ID Number: 47-0890261

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$0	$4,000
Summary of intended use of funds: Three elementary schools in the Chapel Hill Carrboro School District one day a week for one hour for 21-24 weeks during the school year. Number of students vary by school between 40-80 per school.		
Town of Chapel Hill	$1,000	$1,000
Summary of intended use of funds: Three elementary schools in the Chapel Hill Carrboro School District one day a week for one hour for 21-24 weeks during the school year. Number of students vary by school between 40-80 per school.		
Town of Carrboro	$2,000	$4,000
Summary of intended use of funds: Three elementary schools in the Chapel Hill Carrboro School District one day a week for one hour for 21-24 weeks during the school year. Number of students vary by school between 40-80 per school.		

Gail Abrams	*Dave Schell*
Executive Director	Board Chair
1/23/15	1/23/15
Date	Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: December 31, 2002

   b. Years in Operation: 12

   c. Mission or Vision Statement (if applicable): To foster healthy connections among people, wildlife and nature through education programs, conservation projects and a wildlife assistance program.

   d. Brief History of Agency: In 2002, PWC had a mission to support native wildlife through rehabilitation, education and scientific study with emphasis on conservation of wildlife and its habitat in North Carolina. From April 2003 – July 2009, PWC operated a wildlife hospital as well as an education center in a separate location in Durham. The organization closed the wildlife hospital in July 2009 to restructure the organization based on available resources.

   The mission of the organization was changed in 2010 to its current mission. Education programs are geared to school-aged children, their families and the general public as we work to instill in the community an awareness and deeper appreciation for nature and the wildlife that share our environment. We give children direct mentoring and support to explore the wonders of nature like never before. We offer them the skills to become passionate learners and environmental leaders. We offer children and teenagers experiences in nature to foster confidence, natural curiosity and a deepening awareness of the intricacies of the world around them.

   Our conservation programs work to restore and enhance wildlife habitat in the local area and in the backyards and schoolyards of the community. We also work to connect citizens to the needs of wildlife and to assist in our conservation projects through various citizen scientist opportunities. Our wildlife assistance program encourages more local veterinarians to treat wildlife and the Center operates a dawn to dusk volunteer staffed wildlife hotline to refer citizens with wildlife issues to the closest and most appropriate source of care and/or humane removal.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

The young people of today are in danger of losing the skills and ability to connect with the natural world because they are no longer going outside. Research has shown that children are spending half as much time outside as they did 20 years ago. **On average, children spend 4.5 hours a day on the internet, playing video games and/or watching TV.** Offering sufficient outdoor time improves the overall health of our children while lengthening attention spans, diminishing aggressiveness, improving test scores and ultimately advancing learning. A plethora of research has indicated that hands-on environmental education has a measurably positive

impact not only on student achievement in science, but also in reading, social studies, and mathematics.

Outdoor activity has also been proven to improve eyesight, provide Vitamin D for strong bones and healthy hearts, lower body weight, and has been shown to reduce attention deficit symptoms. Most school curricula do not include time spent outdoors, much less time spent studying nature. Numerous studies have tested the impact of nature on children with ADHD. A 2009 study by researchers Andrea Faber Taylor and Frances E. Kuo found that twenty minutes in a park setting was sufficient to elevate attention performance relative to the same amount of time in other settings. These findings indicate that environments can enhance attention not only in the general population but also in ADHD populations. Researchers concluded that "doses of nature" might serve as a safe, inexpensive, widely accessible new tool in the tool kit for managing ADHD symptoms. Faber Taylor, A. & Kuo, F.E. (2009). "Children with attention deficits concentrate better after walk in the park." *Journal of Attention Disorders*, 12, 402-409.

Studies also show that children with more participatory learning experiences have a greater aptitude for leadership, vision and inspired action. Childhood obesity has become one of the major issues facing our country. Getting kids active and outdoors is a consistent strategy in helping to address this critical issue. Piedmont Wildlife Center is working to meet the needs of our children through our school and afterschool programs.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

   We expanded our afterschool programs to two additional Orange County Schools at the beginning of 2015. The two schools added were Ephesus Church and Estes Elementary Schools. We provided teacher training in order for afterschool staff to help implement the program. Two to three staff provided afterschool nature programming once a week at each school for the total afterschool population for (2) seven-week sessions. These sessions were partly funded by a grant from Chapel Hill Carrboro Youth Forward and were modeled after the program we began at Carrboro Elementary School in 2014. We would like to offer this service to both schools and add one more school during 2015-16, however, we will need additional funding to make this happen.

   We have had difficulty getting enough schools in Chapel Hill & Carrboro to request our free school programs funded by this grant. As a result, and because our afterschool programs are in strong demand, we are not requesting funding for school programs this year and asking only for afterschool funding in Orange County, Chapel Hill & Carrboro.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

   We continue to use GlobalGiving.org to fund our elementary and middle school afterschool programs for both Orange & Durham counties. During 2014, we raised $12,885 through GlobalGiving and it remains an ongoing source of funding.

   We secured a $5,000 grant from Chapel Hill Carrboro Youth Forward to expand into more Orange County elementary schools and hope to renew the grant for 2015-16.

Our website contains a landing page with several funding choices. Afterschool scholarships are one of the options and is an ongoing source of donations. We raised $600 in 2014 from this source.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)
   - Durham Public Schools (DPS) Community Education – Worked with their afterschool programs at Creekside, Southwest and Forest View Elementary schools to advertise and target interested students
   - DPS Community Education contracted us to come teach our program to students enrolled in intersession summer camps held at Holt, Easley, and Pearsontown Elementary schools
   - UNC APPLES Intern students learn our teaching methods, assist in implementing the afterschool programs at Durham and Chapel Hill Carrboro schools
   - Volunteer Triangle – volunteers assist us at afterschool programs in DPS

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?
   - Durham Public Schools Community Education – Worked with their afterschool programs at Creekside, Southwest and Forest View Elementary schools to target interested students in need of scholarships
   - Ran sessions in Community Schools summer camps at Holt, Easley, and Pearsontown Elementary schools and have been asked to do so in a larger capacity this coming summer

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X			
Health and Nutrition				
Job Training		X		
Sports and Arts Activities				
Pre-School Activities				

After-School Activities	X			
Mentoring	X			
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
70% of the students will increase their sensory acuity and awareness by focusing their attention on the surrounding environment.	Students will learn to hone their senses to observe, listen, touch, and how to move through the surrounding natural environment with hands-on activities taught and practiced outside.	Of the 49 students that participated in the program, 78% were able to demonstrate moving through their environment using awareness and sensory acuity.	Students and parents/teachers will be given surveys before and after the program to assess their skill level. Quizzes and demonstration of skills taught in the program.
70% of the students will increase their desire to be outside connected with the natural world.	Classes will be conducted outside exposing students to their environment and building a connection with it through familiarity and knowledge of it.	92% of the students like to go outside. Many of the students indicated that they enjoyed going outside on the pre-surveys; however, through teacher post surveys, many students increased either their desire or were more aware of their natural surroundings. Teachers responses indicated that 73% of the students like to share nature objects or stories about their outdoor experiences.	Students and parents/teachers will be given surveys before and after the program to assess their connection with nature. Asking students and parents how much time spent outdoors away from the program and share what they did outside, through photos, stories, or artifacts they bring in.
At least 17% more students will feel safe and spend more time outside by themselves by the end of the school year.	Classes will be conducted outside exposing students to their environment and building a connection with it through familiarity and knowledge of it.	Many students responded in the pre-survey that they felt safe outside; therefore, the results in the post-surveys the percentage of students feeling safe and spending time outside was about the same.	Students will be given surveys before and after the program to assess their connection with nature.

If program(s) did not meet its stated goal(s), please explain:

Meeting 17% more students feeling safe outside and spending more time outside is difficult to meet in this case because 93% of the students responded in the pre-survey that they liked to go outside already.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
At least 90% of the teachers will be able to implement the activities	Our staff provides a two hour teacher training for school staff so they can lead the activities for their group of students	All teachers that participate in the training session will lead the activities we provide	We will document the teachers carrying out the activities. Students will be able to either demonstrate skills or answer questions about the activities.
70% of the students will demonstrate sensory acuity and awareness by focusing their attention on the surrounding environment.	Students will hone their senses to observe, listen, touch, and how to move through the surrounding natural environment with hands-on activities taught and practiced outside.	70% of the students will heighten their awareness and acuity	Parents/teachers will be given surveys before and after the program to assess their skill level. Students will be given surveys, quizzes pre and post program, and demonstrate skills .
70% of the students will desire to be outside connected with the natural world.	Classes will be conducted outside exposing students to their environment and building a connection with it through familiarity and knowledge of it.	70% of the students will express the desire to go outside and involve friends and/or family.	Students and parents/teachers will be given surveys before and after the program to assess their connection with nature.
At least 70% of the students will spend time outside by the end of the school year.	Classes will be conducted outside exposing students to their environment and building a connection with it through familiarity and knowledge of it.	70% of the students will feel safe outside by themselves and will spend more time outside at the end of the year.	Students will be given surveys before and after the program to assess if they are spending time outside

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Piedmont Wildife Center

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)	$ 22,956	$ 35,926	$ 34,331	-4%
Local Government Grants:				
Orange County		$ -	$ 4,000	0
Town of Chapel Hill		$ -	$ 1,000	0
Town of Carrboro	$ 1,500	$ 2,000	$ 4,000	100%
Other Local: Durham County	$ 8,190	$ 8,190	$ 8,190	0%
Other Local: Durham Public Schools	$ 2,000			0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Chapel Hill Carrboro Youth Forv		$ 5,000	$ 5,000	0%
Other Grants:				0
Miscellaneous/Other Revenue		$ 5,000	$ 5,000	0%
Please list 3 largest Miscellanous sources:				
Foundation grant $ 5,000.00				
$ -				
$ -				
Total Program Revenue	**$ 34,646**	**$ 56,116**	**$ 61,521**	**10%**
PROGRAM EXPENSES				
Compensation	$ 46,491	$ 54,053	$ 58,927	9%
Rent & Utilities				0
Supplies & Equipment	$ 2,033	$ 2,344	$ 2,344	0%
Travel & Training	$ 37	$ 250	$ 250	0%
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Program Expenses	**$ 48,561**	**$ 56,647**	**$ 61,521**	**9%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (13,915)**	**$ (531)**	**$ -**	**100%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: contact hour= # of hours spent educating children in active outdoor education activities

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	3923	3923	$48,561	$12.37
Estimated FY14-15	4600	4600	$56,647	$12.31
Projected FY15-16	5000	5000	$61,521	$12.30

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Afterschool Programs

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	344	531	635	Durham City			
Female	286	539	642	Durham County	560	628	680
2. **Ethnicity**				Raleigh City			
African-American	127	215	257	Wake County	3	2	2
Caucasian	375	637	760	Town of Chapel Hill	24	281	426
Hispanic	95	162	162	Town of Carrboro	43	152	159
Other	33	57	68	Orange County		7	10
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years	630	1070	1277	Per cent of clients at, or below, federal poverty level	70%	72%	73%
19-50 Years							
51+ Years							
Unknown				***TOTAL # OF CLIENTS SERVED***	630	1070	1277

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: _____

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 49,351	$ 59,290	$ 63,440	7%
Agency Generated Revenue (fees)	$ 384,943	$ 399,773	$ 419,762	5%
Local Government Grants:				
Orange County				0
Town of Chapel Hill	$ 1,000	$ 1,000	$ 1,000	0%
Town of Carrboro	$ 1,500	$ 2,000		-100%
Other Local: Durham County	$ 8,190	$ 8,190	$ 8,190	0%
Other Local: Durham Public Schools	$ 2,000	$ -	$ -	0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Triangle Community Foundatior	$ 2,500	$ 2,500	$ 2,500	0%
Other Grants: Chapel Hill Carrboro Youth Forv		$ 5,000	$ 5,000	0%
Other Grants: Mericos Foundation	$ 25,000	$ 22,500		-100%
Other Grants: Global Giving Foundation	$ 3,036	$ 5,000	$ 6,000	20%
Corporations	$ 2,680	$ 4,000	$ 4,500	13%
Miscellaneous/Other Revenue	$ 31,000	$ 31,000	$ 31,000	0%
Please list 3 largest Miscellanous sources:				
Durham City in-kind facilities $ 31,000.00				
$ -				
$ -				
Total Agency Revenue	**$ 511,200**	**$ 540,253**	**$ 541,392**	**0%**
AGENCY EXPENSES				
Compensation	$ 349,212	$ 371,140		-100%
Rent & Utilities	$ 46,863	$ 47,030		-100%
Supplies & Equipment	$ 77,843	$ 58,364		-100%
Travel & Training	$ 502	$ 1,460		-100%
Other Expenses:	$ 49,412	$ 60,065		-100%
Please list 3 largest "Other Expenses":				
member programs $ 6,729.00				
insurance/accounting $ 30,538.00				
conservation $ 12,145.00				
Total Agency Expenses	**$ 523,832**	**$ 538,059**	**$ -**	**-100%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (12,632)**	**$ 2,194**	**$ 541,392**	**24576%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1	4%	73,830	77,148	81,005	13.72%	R, H
Director of Education	1	2%	49,963	50,214	52,725	9.29%	R, H
Administrative Assistant	1	4%	35,309	29,448	30,921	6.56%	R, H
Education/Volunteer Coordinator	1	62%	38,840	39,791	41,780	7.22%	R, H
Conservation Coordinator	1		41,779	41,553	43,631	7.76%	R, H
Contractual Educators	2	92%	25,585	42,980	44,269	4.76%	
Camp Counselors	2.5		67,717	72,865	75,051	12.59%	
Office Assistant	1.2	25%	16,189	17,141	17,656	3.01%	
VOLUNTEER HOURS	4						

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: **Planned Parenthood South Atlantic**

Street Address: 1765 Dobbins Dr, Chapel Hill, NC 27514

Mailing Address: PO Box 3258, Chapel Hill, NC 27515

Website Address: www.ppsat.org

Executive Director: Doug Jackson, Interim President and CEO

Telephone: 919-833-7534 x6140 E-Mail: doug.jackson@ppsat.org

Contact Person: Elizabeth Irwin

Telephone: 919-929-5402 x251 E-Mail: elizabeth.irwin@ppsat.org

Fax: 919-933-5271 Federal ID Number: 56-1282557

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$20,000	$20,000
Summary of intended use of funds: To reduce the rates of unintended pregnancy and sexually transmitted infection in the Orange County community by providing education programming for a diverse group of teens, parents, and women of reproductive age.		
Town of Chapel Hill	$2,500	$2,500
Summary of intended use of funds: To reduce the rates of unintended pregnancy and sexually transmitted infection in the Chapel Hill community by providing education programming for a diverse group of teens, parents, and women of reproductive age.		
Town of Carrboro	$1,000	$1,000
Summary of intended use of funds: To reduce the rates of unintended pregnancy and sexually transmitted infection in the Carrboro community by providing education programming for a diverse group of teens, parents, and women of reproductive age.		

Executive Director

1/23/2015

Date

Board Chair

1/23/2015

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

    a. Date of Incorporation: 1980

    b. Years in Operation: 35

    c. Mission or Vision Statement (if applicable):

Planned Parenthood South Atlantic (PPSAT) is an essential health care provider, committed to educating our communities as well as expanding and protecting access to reproductive health services. PPSAT works to reduce the incidence of unintended pregnancy, HIV/AIDS, and other sexually transmitted infections (STIs), especially among teens, emerging adults (19-29), those with limited financial resources and uninsured patients.

    d. Brief History of Agency:

For more than 30 years, Planned Parenthood has served Orange County as a safety-net provider and respectful resource for direct health care and information. This year, Planned Parenthood of Central North Carolina (PPCNC) merged with a partner affiliate, Planned Parenthood Health Systems (PPHS), in order to increase the number of patients cared for and develop a stronger policy/advocacy presence. With 15 health centers across a four state region, these united affiliates are now known as Planned Parenthood South Atlantic (PPSAT).

Just like the role PPCNC and PPHS served individually, PPSAT continues to offer respectful, confidential, and affordable care, including birth control consultation and supplies, emergency contraception, gynecological exams, cancer screenings, pregnancy testing, STI testing and treatment, and HIV testing. We reduce barriers to accessing care by offering same-day and by-appointment visits, evening and weekend hours, bilingual staff, and fees that are typically less than those of private providers. Last year, PPSAT's 15 health centers provided 51,400 preventive health care visits.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

In 2013, North Carolina's teen pregnancy rate fell 11% to 35.2 out of every 1,000 15-19 year old girls, which is a record low in the state's history.[1] These numbers have been dropping significantly for the past six years, with an overall 67% decline in teen pregnancy since 1990.[2]

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1 Adolescent Pregnancy Prevention Campaign of North Carolina – *Data Map 2013*. http://www.appcnc.org/data/map/northcarolina

However, North Carolina only ranks 20th nation-wide in terms of teen pregnancy, with a rate well above the national average of 26.6 out of every 1,000 15-19 year old girls.[3] Additionally, disparities remain among racial and ethnic groups. In 2013, the African American teen pregnancy rate was 49.2 per 1,000, the rate for Hispanic teens was 57.9 per 1,000, and the rate for white teens was 24.7 per 1,000 in North Carolina.[4]

Unfortunately, Orange County demonstrates an even greater racial and ethnic disparity when it comes to teen pregnancy rates. In our community, 4.8 out of every 1,000 White teens experience teen pregnancy, whereas 21.3 out of 1,000 African American and 41.3 out of 1,000 Hispanic teens are faced with this challenge.

According to the 2013 Youth Risk Behavior Survey (YRBS) for North Carolina, over 47% of high school students report having had sexual intercourse.[5] That includes 57.5% of juniors and 63.9% of seniors. This demonstrates that many adolescents are confronted at some point during their teen years with choices about whether or not to have sex and, if they do, whether or not to use condoms and/or other contraceptives.

Research shows that teens who begin having sex at an earlier age are less likely to use contraception and more likely to become pregnant and to become a parent. They are also more likely to accumulate a greater number of lifetime sexual partners.[6] Of those that reported having had sex, only 60.8% used a condom the last time they had sex. In addition, 21.2% reported using drugs or alcohol before sex.

PPSAT will provide *Becoming a Responsible Teen* (BART), an evidence-based, comprehensive curriculum specifically designed to increase many of the knowledge and skill-based protective factors about contraception use and negotiation skills. In addition to the BART curriculum for high school students, PPSAT will conduct *Smart Girls*, a science-based, intensive adolescent pregnancy prevention program for middle school girls. The goal of both programs is to build self-esteem and healthy decision-making to delay initiation of sex, increase condom use of sexually active teens, and reduce the number of sexual partners for those teens.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Although the merger was effective January 1, 2015, there is still much to do to complete the merger process. The board for the merged affiliate has been named and consists of members of both previous boards. Members of the senior leadership team have been named and are now in the process of transitioning to their new management roles.

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[2] Adolescent Pregnancy Prevention Campaign of North Carolina – *Data*. http://www.appcnc.org/data
[3] U.S Department of Health and Human Services -Trends in Teen Pregnancy and Childbearing. http://www.hhs.gov/ash/oah/adolescent-health-topics/reproductive-health/teen-pregnancy/trends.html
[4] Adolescent Pregnancy Prevention Campaign of North Carolina – *Data Map 2013*. http://www.appcnc.org/data/map/northcarolina
[5] NC Department of Public Instruction. *North Carolina Youth Risk Behavior Survey High School 2013 Survey Results*. 2013.
[6] Kirby, D., Lepore, G., & Ryan, J. (2005) Sexual Risk and Protective Factors: Factors Affecting Teen Sexual Behavior, Pregnancy, Childbearing. Washington DC: The National Campaign to Prevent Teen Pregnancy.

Despite infrastructural changes to the organization, the local need for our services remains ever-present and growing. Our education department will continue to recruit adolescents throughout Orange County and train them using medically-accurate, intensive, and balanced sexuality education programs that promote positive sexuality, healthy behavior, and responsible choices.

Becoming a Responsible Teen (BART) is an evidence-based HIV and sex education curriculum designed for after-school, community-based settings. BART's focus on improving condom use and negotiation skills makes this curriculum ideal to influence specific behaviors related to sexual risk-taking. Suited for both male and female high school students, the program offers activities and information that consistently reinforce protective factors. We will supplement the core BART curriculum with four additional sessions including Healthy Relationships, Substance Use and Decision-making, Sexual Violence and Contraception. BART also includes a peer education component, where students gain skills in sharing the information they have learned.

Smart Girls is a science-based curriculum designed to build self-esteem and have a positive impact on teen pregnancy and HIV/STI risk-taking behavior, including decreasing sexual activity, decreasing the number of sexual partners, and improving condom use among sexually active youth. *Smart Girls* specifically targets middle school girls, which enables us to reach a critical younger audience with a female-targeted program.

We will invite graduates of our teen education programs to participate in our alumni group. Through the alumni group, we will look at the larger community to identify other needs and design and implement appropriate service projects. This service-learning component will work to increase community involvement.

Parent workshops will improve parents' confidence in talking to their children about sex and will increase parent-child communication about sex and contraception. Alumni will lead workshop sessions so that parents have the opportunity to practice talking to teens about these sensitive topics.

Our program will also include a series of charlas or chats aimed at young women (aged 19 – 25) who do not qualify to participate in our after-school program. These workshops will engage them in a dialogue about family planning and pregnancy prevention.

Although we plan to continue conducting enrollment assistance activities during open enrollment in Fall 2015, we are still unsure what form these activities will take and have decided not to include them in the scope of work for this project.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

In addition to County and Town support, PPSAT receives funding for its educational programs from a number of private foundations, including the Mericos Foundation, the F.M. Kirby Foundation, and the Strowd Roses Foundation. All of these foundations have a long history of supporting our programs and we anticipate their renewed support for FY16. In addition to funds

raised specifically for education, we make a significant institutional contribution each year - designating funds raised for general operating support.

We actively pursue new individuals and foundations interested in supporting our vital medical services. We have an exceptionally strong base of support in the community that is committed to the services we provide. Last year, more than 5,000 individuals gave generously to support the work and missions of PPHS and PPCNC.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

In our community outreach and education efforts, PPSAT recognizes the importance of leveraging existing trusted relationships. We believe that programs that attempt to serve the community, especially minority communities, without paying attention to building mutual confidence and establishing relationships are unlikely to succeed. PPSAT has developed a collaborative relationship with El Centro Hispano, which provides general social services to the Latino population in Chapel Hill, Carrboro, and the surrounding areas. We will continue to work with them when recruiting women and their families for involvement in *BART*, *Smart Girls*, parent workshops, and charlas/chats.

Other established community partners will also be contacted to support our recruitment efforts and to host the various workshops and informational sessions. These organizations include:

- Compass Center
- Orange County Library Systems
- Chapel Hill, Carrboro, and Orange County Schools
- League of Women Voters
- El Centro Hispano

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

One of the ongoing goals of PPSAT is to be an inclusive organization that respectfully serves diverse communities. Many of our staff is bi-lingual, including our Orange/Durham County community educator, which removes one of the major barriers to addressing issues of sexual and reproductive health within the Spanish-speaking community.

Over the past decade, we have cultivated a proven track record within the local Latino and African-American communities as a trusted source for health care and education. We work with several community partners that serve minority communities. Through previous education programs, *Joven a Joven* and *Entre Familia*, we have developed trusted education partners in the Orange County Latino community (see above), which we will continue to utilize to ensure the success of this year's programs.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X		
Health and Nutrition	X	X		
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities	X			
Mentoring				
Transportation				
Housing				
Other: Community Engagement	X			

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Increase knowledge about pregnancy prevention and HIV/AIDS and improve prevention skills among youth in Orange County. Specifically, increase participants' negotiation skills surrounding abstinence and condom use and increase condom use among participants who are sexually active.	Train 15 culturally diverse teens through a culturally appropriate evidence-based HIV prevention curriculum	15 teens total 100% of goal	For the BART program, we conducted pre- and post-testing of the student's knowledge of preventing pregnancy and HIV. Post-tests indicated positive changes. Highlights included: All participants answered correctly that the most effective way to prevent STIs and pregnancy is to not have sex. 93% of participants answered correctly that condoms are effective in preventing HIV transmission and pregnancy compared to 73% before.
Strengthen participants' ties to the community and increase community involvement, while providing additional education and training around contraception, reinforcing positive attitudes towards contraception and improving confidence in their use.	As peer educators, these teens will reach 300 (20 contacts each) with information about preventing pregnancy and STIs	202 peers reached 67.3% of goal	Peer-educators maintained contact logs so that the Community Educator could review them for accuracy and completeness.
Increase parent confidence and skills in talking with their children of all ages about sexuality issues including puberty, preventing unintended pregnancy, preventing	Offer two parent workshops – one in English, one in Spanish. Reach 20 culturally diverse parents with information about how to talk to their kids about sex.	16 parents 80% of goal	We distributed participant feedback surveys at both the parent workshops: • 100% agreed that the information presented

STIs/HIV, and maintaining healthy relationships.			in the workshop was important for family and the community. • 100% agreed or mostly agreed the information provided was useful. • 100% said the facilitator did a good job presenting the information.
Increase awareness of the advantages and availability of all forms of contraception among women of reproductive age.	Host two, 1 ½ hour workshops (one in English, one in Spanish) to a diverse group of young women to increase awareness of advantages and availability of *all forms* of contraception.	49 women over two workshops	We distributed participant feedback surveys at both birth control workshops: • 100% agreed that the workshop was important for family and the community. • 100% of respondents agreed that the information presented in the workshop was important for family and the community. • 87% said the workshop was informative. • 89% said the workshop was fun and interesting. • 100% said the facilitator did a good job presenting the information.
Ensure that all those who qualify for health insurance through the state marketplace receive the resources they need, and engage our patients and community members as advocates for Medicaid expansion in North Carolina	We trained staff to screen for eligibility, and we had two interns embedded at the health center to provide hands-on assistance. Throughout Chapel Hill, our staff and volunteers knocked on doors and talked with uninsured citizens about how they and their families can benefit from the new law. The interns in Chapel Hill tabled at UNC's public health atrium and enrolled people at the Chapel Hill Library. We hosted a series of Affordable Health Care Open Houses at our health center.	1,930 community members reached 35 community events 230 people received 1:1 assistance 260 doors knocked 801 ACA enrollment info cards distributed 639 Medicaid cards signed	Health center staff and volunteers maintained a logbook to tracks information distributed and materials provided.

If program(s) did not meet its stated goal(s), please explain:

Teens made contact with their friends, family, and community members and shared the information they learned. Many did not complete their required 20 contacts. The Community Educator is considering methods to improve compliance.

B. FY 2015-16 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Goal 1: Increase knowledge about pregnancy prevention and HIV/AIDS and improve prevention skills among youth in Orange County. Specifically, increase participants' negotiation skills surrounding abstinence and condom use and increase condom use among participants who are sexually active.	1. Using the *Becoming a Responsible Teen* curriculum, provide a diverse group of high school teens with medically accurate information, empowering them to make responsible choices based on their own ethics and values. 2. Peer-educators will work within their schools and communities to disseminate to others the information they have learned. 3. Using the *Smart Girls* curriculum, provide a diverse group of middle school girls with medically accurate information, empowering them to make responsible choices based on their own ethics and values.	1. PPSAT will recruit at least 15 teens (ages 14 – 18) and provide training around issues of sexuality, healthy relationships, abstinence and contraceptive options, communication and decision-making skills and goal setting. All participants will demonstrate at least a 10% increase in knowledge about preventing pregnancy and STIs. 2. Each peer-educator will make 20 contacts in their community – reaching an additional 300 individuals. 3. PPSAT will recruit at least 10 girls (ages 10 – 14) and provide training around issues of sexuality, healthy relationships, abstinence and contraceptive options, self-esteem, communication and decision-making skills and goal setting. All participants will demonstrate at least a 10% increase in knowledge about preventing pregnancy and STIs.	1. & 3. PPSAT will measure the competency levels of BART and *Smart Girls* participants through pre- and post-program tests. The pre-test will be administered at the beginning of the first session, and the post-test will be administered immediately following the conclusion of the program. Measurable outcomes include a change in knowledge, attitudes, and behaviors. 2. Peer-educators will maintain contact logs so that the Community Educator can review them for accuracy and completeness.
Goal 2: Strengthen participants' ties to the community and increase community involvement, while providing additional education and training around contraception, reinforcing positive attitudes towards contraception and improving confidence in their use.	Create an alumni group for graduates of education programs who will conduct annual service-learning activities.	At least 8 Orange County graduates will participate in the alumni group, and conduct an annual student-led service-learning project.	PPSAT will seek out feedback from the groups that the alumni group works with during their service learning activity to access the value of the participants' contribution.

Goal 3: Increase parent confidence and skills in talking with their children of all ages about sexuality issues including puberty, preventing unintended pregnancy, preventing STIs/HIV, and maintaining healthy relationships.	Provide a series of parent workshops that will include skill building and information on talking with their children about sex. Sessions will include: role play discussing relationships, contraception, STIs and peer pressure. One session will be conducted in English, one session in Spanish	At least 15 parents of middle and high school students will participate in parent workshops. At least 75% of parents will report increased comfort in talking with their kids about sexuality issues. At least 75% of parents will report they intend to talk to their children about sex as a result of the workshop.	Participants will provide feedback on the quality of the program by completing surveys.
Goal 4: Increase awareness of the advantages and availability of all forms of contraception among women of reproductive age.	Host a series of workshops (charlas or chats) to help women of reproductive age assess their risk of pregnancy. One session will be conducted in English, once session in Spanish.	At least 15 women of reproductive age about the benefits and availability of various contraceptive methods. At least 75% of participants will report an understanding of their risk of pregnancy and have a plan for preventing unintended pregnancies.	Participants will provide feedback on the quality of the program by completing surveys.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Planned Parenthood South Atlantic**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 20,000	$ 20,000	$ 20,000	0%
Town of Chapel Hill	$ 2,000	$ 2,500	$ 2,500	0%
Town of Carrboro	$ 1,000	$ 1,000	$ 1,000	0%
Other Local:				0
Other Local:				0
Other Local:				-100%
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Strowd Roses	$ 5,000	$ -	$ 5,000	0
Other Grants: Mericos Foundation	$ 4,259	$ 12,500	$ 10,000	-20%
Miscellaneous/Other Revenue		$ 3,755	$ 241	-94%
Please list 3 largest Miscellanous sources:				
PPCNC General Operating $ -		$ 3,755	$ 241	
$ -				
$ -				
Total Program Revenue	**$ 32,259**	**$ 39,755**	**$ 38,741**	**-3%**
PROGRAM EXPENSES				
Compensation	$ 26,585	$ 22,900	$ 23,446	2%
Rent & Utilities	$ 266	$ 1,150	$ 1,150	0%
Supplies & Equipment	$ 219	$ 3,005	$ 2,255	-25%
Travel & Training	$ 322	$ 2,790	$ 2,460	-12%
Other Expenses:	$ 4,867	$ 9,910	$ 9,430	-5%
Please list 3 largest "Other Expenses":				
Refreshments $ -	$ 952	$ 2,880	$ 2,880	
Incentives $ -	$ 3,615	$ 6,370	$ 6,130	
Misc. $ -	$ 300	$ 660	$ 420	
Total Program Expenses	**$ 32,259**	**$ 39,755**	**$ 38,741**	**-3%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: One individual participating in any area of the program.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	1,855	2,212	$32,259	$14.58
Estimated FY14-15	843	-	$39,755	$47.16
Projected FY15-16	363	-	$38,741	$106.72

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: PPCNC Education programs

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**	1,856 unknown			4. **Geographic Location(s)**			
Male	89	354	110	Durham City			
Female	267	489	253	Durham County	10		
2. **Ethnicity**				Raleigh City			
African-American	98	253	95	Wake County			
Caucasian	109	337	87	Town of Chapel Hill	179	548	235
Hispanic	201	169	100	Town of Carrboro	119	211	90
Other/Unknown	1,804	84	81	Orange County	1,904	84	38
3. **Age**				Other (specify)			
0-5 Years		0					
6-18 Years	67	210	233	Per cent of clients at, or below, federal poverty level	Unknown	Unknown	Unknown
19-50 Years	27	507	130				
51+ Years		126					
Unknown	2,118			***TOTAL # OF CLIENTS SERVED***	2,212	843	363

- In FY14, we did not collect demographic information for our ACA program.

Section VI.

Comparative Budget for Entire Agency
(Excel file)

Agencies must still send a copy of the MS Excel file with their electronic application, even if they choose to embed the Excel table, on this page. The MS Excel file can be found here.

1. Please complete a Comparative Budget Excel Form **for the entire agency.** This budget form is required, even if the figures match the Program Budget Form(s).

2. If the agency's finances experienced significant changes that you would like to explain, please use the space below.

On January 1, 2015 Planned Parenthood of Central North Carolina merged with Planned Parenthood Health Systems to become Planned Parenthood South Atlantic. So, prior to January 1, Planned Parenthood South Atlantic did not exist.

We have attached the 990 and audited financial statement of Planned Parenthood Health Systems for FY14, as they are the organization whose EIN has continued with Planned Parenthood South Atlantic.

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Planned Parenthood South Atlantic**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	N/A	$ 4,102,885	$ 4,152,749	1%
Agency Generated Revenue (fees)	N/A	$ 9,492,745	$ 9,145,612	-4%
Local Government Grants:				
Orange County	N/A	$ 20,000	$ 20,000	0%
Town of Chapel Hill	N/A	$ 2,500	$ 2,500	0%
Town of Carrboro	N/A	$ 1,000	$ 1,000	0%
Other Local:	N/A	$ -	$ -	0
Other Local:	N/A	$ -	$ -	0
Other Local:	N/A	$ -	$ -	0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	N/A	$ -	$ -	0
State Government	N/A	$ 135,000	$ 135,267	0%
Federal Government	N/A	$ 2,046,704	$ 2,046,704	0%
Other Grants:	N/A	$ 1,847,275	$ 2,637,827	43%
Other Grants:	N/A			0
Miscellaneous/Other Revenue	N/A	$ 270,801	$ 222,804	-18%
Please list 3 largest Miscellanous sources:				
Unrealized Gain $ 97,522.00				
Interest/Dividends $ 31,479.00				
Rental Apartments $ 31,800.00				
Total Agency Revenue	**$ -**	**$ 17,918,910**	**$ 18,364,463**	**2%**
AGENCY EXPENSES				
Compensation	N/A	$ 9,830,173	$ 10,140,212	3%
Rent & Utilities	N/A	$ 973,502	$ 993,682	2%
Supplies & Equipment	N/A	$ 3,255,731	$ 3,117,759	-4%
Travel & Training	N/A	$ 795,369	$ 817,223	3%
Other Expenses:	N/A	$ 2,705,757	$ 2,928,299	8%
Please list 3 largest "Other Expenses":				
Contract Services $ 521,943.00				
Depreciation $ 506,345.00				
Dues & Fees $ 385,043.00				
Total Agency Expenses	**$ -**	**$ 17,560,532**	**$ 17,997,175**	**2%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ 358,378**	**$ 367,289**	**2%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Planned Parenthood South Atlantic

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Community Educator	1	50%	$33,150	$33,150	$33,150	.19%	(H)
Director of Education	1	5%	$43,636	$43,636	$43,636	.25%	(H)
PPSAT has 250+ employees. We obtained permission from Allison Chambers to include just positions relating to the program in Orange County.							

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: **Public Gallery of Carrboro dba WCOM-LP Radio**

Street Address: 300-G East Main St.; Carrboro, NC 27510

Mailing Address: 300-G East Main St.; Carrboro, NC 27510

Website Address: www.wcomfm.org

Executive Director: N/A

Telephone: N/A E-Mail: N/A

Contact Person: Art Menius

Telephone: 443-605-4355 E-Mail: artmenius22@gmail.com

Fax: _____ Federal ID Number: 56-2010901

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$0.00	$1000.00
Summary of intended use of funds: **General Operating support** of non-profit community radio programming, training of community radio hosts, purchase of new broadcast equipment and maintenance of current equipment.		
Town of Chapel Hill	$0.00	$1000.00
Summary of intended use of funds: **General Operating support** of non-profit community radio programming, training of community radio hosts, purchase of new broadcast equipment and maintenance of current equipment.		
Town of Carrboro	$0.00	$1000.00
Summary of intended use of funds: **General Operating support** of non-profit community radio programming, training of community radio hosts, purchase of new broadcast equipment and maintenance of current equipment.		

No Executive Director

Executive Director

Board Chair

1/13/15

Date

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

    a. Date of Incorporation: January 30, 1997

    b. Years in Operation: 18 years as a non-profit, 10 as a community radio station.

    c. Mission or Vision Statement (if applicable): Facilitating the exchange of ideas and music with particular regard for those who are overlooked or under-represented by other media outlets. Providing a mechanism for volunteers to become creators and contributors.

    d. Brief History of Agency: Public Gallery of Carrboro was originally created to facilitate the extraordinary Art on Weaver public art project in 1997. Ruffin Slater filed an application with the FCC for a low power FM radio license in June 2001 for WCOM. License granted in December 2002. In September 2003 WCOM received a federal PTP grant for 75% of startup costs. WCOM began broadcasting in 2004 from an old bank building on Weaver Street in Carrboro with its transmitter at Scroggs Elementary in Chapel Hill. The studio moved first to 208 East Main and then in September 2012 to space rented from The ArtsCenter. The Carrboro BOA named November 6, 2014 "Community Radio Day" in Carrboro to recognize WCOM's tenth anniversary.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.
    - Locally owned and operated broadcast media
    - Training for residents in radio production and broadcasting
    - Practical broadcasting experience for residents
    - Delivery of public service announcements

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.
    - Due to the potential move of The ArtsCenter and construction of a hotel or other for profit facility on our location, WCOM may be compelled to move prior to June 30, 2016. Projected cost of such move and upfit is $10,000.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

    - Program and Golden Voices underwriting, ongoing
    - Individual donations, ongoing

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)
    - The Wacqueline Stern Show is video recorded and broadcast on the People's Channel
    - Collaboration has been discussed with Raleigh Little Radio and WHUP-LPFM soon to launch in Hillsborough

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

   We offer a large number of radio programs produced by local African-American programmers and featuring music rooted in African-American traditions.
   We have offered substantial numbers of Spanish language programs and Hispanic produced English language, including locally produced shows.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition				
Job Training				
Sports and Arts Activities	X	X	X	X
Pre-School Activities				
After-School Activities				
Mentoring	X	X	X	X
Transportation				
Housing				
Other – public broadcasting	X	X	X	X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Maintain broadcasting over the airwaves and via the Internet 99% of the time	Maintain and upgrade equipment. Recruit and train new show hosts. Enhance backup systems and programming.	Maintained over the air broadcasting 99.71% of the time and via the Internet 99.43% of the time	Maintenance requests

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Maintain broadcasting over the airwaves and via the Internet 99% of the time	Maintain and upgrade equipment. Recruit and train new show hosts. Enhance backup systems and programming.	Broadcasting over the air and via the Internet at least 99% of the time.	Maintenance records

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Public Gallery of Carrboro – WCOM Radio**

	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
PROGRAM REVENUE				
Private Donations	$ 13,000	$ 15,500	$ 16,500	6%
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County			$ 1,000	0
Town of Chapel Hill			$ 1,000	0
Town of Carrboro			$ 1,000	0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 13,000**	**$ 15,500**	**$ 19,500**	**26%**
PROGRAM EXPENSES				
Compensation	$ -	$ 250	$ 600	140%
Rent & Utilities	$ 9,600	$ 9,600	$ 9,600	0%
Supplies & Equipment	$ 1,700	$ 2,000	$ 4,200	110%
Travel & Training				0
Other Expenses:	$ 3,100	$ 3,300	$ 3,500	6%
Please list 3 largest "Other Expenses":				
Insurance $ 1,600.00				
Broadcasting Fees $ 1,500.00				
Equipment $ 1,100.00				
Total Program Expenses	**$ 14,400**	**$ 15,150**	**$ 17,900**	**18%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (1,400)**	**$ 350**	**$ 1,600**	**357%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: One 24-hour broadcasting day

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	365	364	$14,400	$39.56
Estimated FY14-15	365	364	$15,150	$41.62
Projected FY15-16	366	365	$19,500	$53.42

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: WCOM community radio broadcasting: Given our service, all numbers are estimates

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	10392	11143	11894	Durham City			
Female	11258	12072	12886	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	2187	2345	2503	Wake County			
Caucasian	12362	13256	14149	Town of Chapel Hill	12907	13768	14628
Hispanic	2988		3420	Town of Carrboro	4416	4711	5005
Other	1775	1904	2032	Orange County	677	722	767
3. **Age**				Other (specify) Internet listeners	3650	4015	4380
0-5 Years	0	0	0				
6-18 Years	4655	4991	5328	Per cent of clients at, or below, federal poverty level	19%	19%	19%
19-50 Years	11193	12002	12811				
51+ Years	5802	6222	6641				
Unknown				***TOTAL # OF CLIENTS SERVED***	21650	23215	24780

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Public Gallery of Carrboro – WCOM Radio**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 13,000	$ 15,500	$ 16,500	6%
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County			$ 1,000	0
Town of Chapel Hill			$ 1,000	0
Town of Carrboro			$ 1,000	0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 13,000**	**$ 15,500**	**$ 19,500**	**26%**
AGENCY EXPENSES				
Compensation	$ -	$ 250	$ 600	140%
Rent & Utilities	$ 9,600	$ 9,600	$ 9,600	0%
Supplies & Equipment	$ 1,700	$ 2,000	$ 4,200	110%
Travel & Training				0
Other Expenses:	$ 3,100	$ 3,300	$ 3,500	6%
Please list 3 largest "Other Expenses":				
Insurance $ 1,600.00				
Broadcasting Fees $ 1,500.00				
Equipment $ 1,100.00				
Total Program Expenses	**$ 14,400**	**$ 15,150**	**$ 17,900**	**18%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (1,400)**	**$ 350**	**$ 1,600**	**357%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Public Gallery of Carrboro doing business as WCOM-FM community radio

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Development Director	0.05	1	$0.00	$250.00	$600.00	3.1%	
Station Engineer (volunteer)	0.1	1	0.00	0.00	0.00	0	
Program hosts & engineers (volunteer)	1.8	57	0.00	0.00	0.00	0	
Treasurer (volunteer)	0.1	1	0.00	0.00	0.00	0	

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Rebuilding Together of the Triangle, Inc.**

Street Address: 8208 Brownleigh Drive Raleigh, NC 27616

Mailing Address: 324 S. Wilmington St. #118 Raleigh, NC 27601

Website Address: www.rebuildingtogethertriangle.org

Executive Director: Dan Sargent

Telephone: (919) 996-0999 E-Mail: Daniel.sargent@rebuildingtogethertriangle.org

Contact Person: Dan Sargent

Telephone: (919) 996-0999 E-Mail: Daniel.sargent@rebuildingtogethertriangle.org

Fax: (919) 833-2448 Federal ID Number: 56-1955629

Funding Source Summary – Briefly state how any awarded funds would be used.	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$0	$30,000
Summary of intended use of funds: We are requesting funding to complete critical repairs and modifications for at least 8 low-income Orange County homeowners. Our work will be focused on creating safe, healthy homes for these elderly or disabled homeowners.		
Town of Chapel Hill	$3,000	$20,000
Summary of intended use of funds: We are requesting funding to complete critical repairs and modifications for at least 3 low-income Chapel Hill homeowners. Our work will be focused on creating safe, healthy homes for these elderly or disabled homeowners.		
Town of Carrboro	$6,500	$8,000
Summary of intended use of funds: We are requesting funding to complete critical repairs and modifications for at least 2 low-income Town of Carrboro homeowners. Our work will be focused on creating safe, healthy homes for these elderly or disabled homeowners.		

Executive Director

1/23/15
Date

Board Chair

1/23/15
Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 1/2/1996

   b. Years in Operation: 19

   c. Mission or Vision Statement (if applicable):

      Rebuilding Together of the Triangle makes a sustainable impact by revitalizing low- income homes and communities, assuring that low-income homeowners from the elderly and disabled to families with children and military veterans live in safe, healthy homes.

   d. Brief History of Agency:

      Rebuilding Together of the Triangle, Inc. (RTT) focuses on preserving safe, healthy homes for low-income homeowners in Wake, Durham, Orange and Chatham counties. We achieve this by providing home repairs, accessibility modifications and health and safety upgrades to these homeowners, most of whom are elderly, disabled, or both. We mobilize a unique composition of volunteers and skilled contractors, discounted and donated supplies, and financial support from local businesses, governments, civic organizations, foundations and individuals to ensure that some of our most vulnerable neighbors can live in a safe, healthy home.

      The organization was originally called Christmas in April of Wake County, and was incorporated in 1996. In 2007, after a period of inactivity in the mid -2000's, a dedicated board of directors came together, rebranded the organization and expanded the service area to encompass RTT's current four-county area. After completing a few projects in 2007 and 2008 as a volunteer-run organization, the board decided to hire a part-time project coordinator as 2009 began. With this additional capacity, growth was immediate and sustained; RTT completed 13 projects in 2009, and has steadily expanded its productivity over the last five years, completing 48 projects in 2014. The project coordinator, Dan Sargent, has become the full-time Executive Director, and the organization has added a Program Director and Field Operations Manager to the team. During that period, the organization's budget has grown, despite the recent economic climate, from under $50,000 in 2009 to a projected $436,500 in 2015.

      RTT is an affiliate of Rebuilding Together, Inc., the nation's largest non-profit organization working to preserve affordable housing through home repairs,

modifications and weatherization. Headquartered in Washington, DC, Rebuilding Together has almost 200 affiliates nationwide. Each year, Rebuilding Together engages 200,000 volunteers to complete work on nearly 10,000 homes, in 1,800 communities.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

RTT seeks to develop sustainable strategies to preserve and revitalize homes and communities, assuring that low-income homeowners, from the elderly and disabled to families with children, live in safe and healthy homes. In the 2005-2010 Housing and Development Comprehensive Plan, the County identified a serious need for urgent repairs to the homes of many county residents. While the County's Urgent Repair and Single-Family Rehabilitation programs have addressed some of these, there continues to be a significant number of county residents dealing with critical health and safety issues. We are coordinating our efforts with the County's Urgent Repair Program to assist with serving their waiting list, to get help to as many residents as efficiently as possible.

Based on thousands of peer-reviewed studies and first-hand experience, experts in the US and abroad recently have forged consensus on the significance of important health risk factors in housing. For example, a 2000 Institute of Medicine report recognized the following six factors in homes as asthma triggers: secondhand smoke, dust mite allergens, mold allergens, cockroach allergens, rat and mouse dander, and pet dander.[1] In 2004, another Institute of Medicine panel found that children who live in homes or attend schools with moisture and mold problems have twice the risk for asthma and other respiratory problems.[2] In 2011, the World Health Organization examined more than a dozen risk factors and developed comprehensive estimates of the significant health burden of inadequate housing as measured in disability adjusted life years and avoidable fatalities.[3]

The evidence is also clear that health and safety hazards in our homes add billions to national health care costs, as the following examples make clear:

- Unintentional injuries in the home cause more than 21 million medical visits per year at a cost more than $222 billion per year; falls in the home account for more than $60 billion per year alone;[4] each broken hip costs $37,000 on average.[5]

---

[1] Clearing the Air: Asthma and Indoor Air Exposures. Institute of Medicine. 2000.

[2] Damp Indoor Spaces and Health. Institute of Medicine. 2004.

[3] Environmental Burden of Disease Associated with Inadequate Housing. World Health Organization. 2010.

[4] The State of Home Safety in America: Facts about Unintentional Injuries in the Home. Home Safety Council. 2004.

[5] American Academy of Othropaedic Surgeons: http://orthoinfo.aaos.org/topic.cfm?topic=A00101

- Indoor exposures to virtually all air pollutants are 2-10 times higher than outdoors,[6] contributing to a host of acute and chronic diseases including asthma, hypertension and stroke, radon-induced lung cancer (21,000 deaths),[7] neurological effects of pesticide and lead exposures, and the effects of carbon monoxide exposure – from flu-like symptoms to fatalities.

- Asthma, which is the leading cause of missed school days, accounts for about 3% of all U.S. health care costs – $14.7 billion per year in direct costs – plus $5 billion in lost productivity.[8]

These problems are experienced by many in our communities, but tend to be concentrated among those who are most vulnerable and least prepared financially and physically to address them. Their homes tend to be older, and are often under-maintained; deferred maintenance issues can result in serious health and safety hazards, many of which are particularly threatening for the elderly, disabled, and young children.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

We are not anticipating significant operational changes to our home repair and modification program in the upcoming fiscal year; however, we do anticipate continued growth, both in terms of revenue and the number of homeowners served. We have budgeted for revenues of $436,500 in the calendar year 2015, up nearly 40% from our 2014 budget. This increase is projected to come from several new corporate partnerships that are developing, as well as from additional sources of grant funding, specifically the NC Housing Finance Agency. We had a small Urgent Repair Program (URP) grant from the Housing Finance Agency in 2012 and 2013, and this year have applied for $200,000 to complete additional repairs to homes in Orange County and Chatham County. While this grant decision is not final, we are optimistic about the opportunity to serve more homeowners in Orange County, many of whom have been waiting for a year or more.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

RTT has developed funding resources in five (5) primary streams: Corporations (34%), RT National Office (38%), Private Foundations and Civic Organizations (9%), Local Governments (14%), and Individuals (5%)

- Corporations – We have been very successful in developing partnerships with the private sector through our volunteer and sponsor engagement efforts, and growth in this source of funding is projected to remain strong in the coming years. We work with companies like Rodgers Builders, Robuck Homes, Wells Fargo, Bank of America, Cole Jenest & Stone, and Smith Anderson among many others of all sizes,

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[6] Samet, J.M., Spengler,J.D., eds. *Indoor Air Pollution - A Health Perspective.* Johns Hopkins University Press. Baltimore, MD. 1991.

[7] Assessment of Risks From Radon in Homes. US Environmental Protection Agency. 2003.

[8] Agency for Healthcare Research and Quality: http://www.ahrq.gov/qual/nhdr10/Chap2c.htm.

across various industries. We provide an excellent sponsor experience for the company and a great volunteer engagement chance for their employees. In return, we ask them to not only pay for materials and supplies, but also to partner in supporting the operating cost of the organization. This ensures that we have the resources necessary to continue to serve more homeowners. We are projecting that this revenue stream will grow significantly in 2015 and into the future.

- RT National Office – We are in a key market for our national organization, and have benefitted substantially over the last five years from the support of Rebuilding Together's national partners. These partners include Sears, Lowes, Honeywell, Shell, Choice Hotels, USAA, Cricket Communications, Wells Fargo, Phillips 66, Fannie Mae Foundation, and Honeywell. Though these funding opportunities have continued to expand over the last several years, changes in the National Office fundraising strategy will most likely result in fewer pass through grants in the future. We are budgeting for a significant decrease in this funding stream in 2015.

- Private Foundations and Civic Organizations – We receive a few grants each year from private foundations and other civic or nonprofit organizations, such as Carolina Meadows, Bike and Build Foundation, Mary Duke Biddle Foundation, and the Cary Jaycees. We believe there are opportunities to take advantage of these grants periodically to add capacity to our program, but do not see these sources as a centerpiece of our fundraising strategy. These funders are not always willing to provide on-going support, but prefer to support short-term initiatives to develop new or expand the scope of existing programs. Several of our existing funders are very committed, and we expect to receive grants from other funders on something of a rotating basis in the coming years.

- Local Government – We believe that our program provides an excellent value for the investment of local government dollars, and we have worked diligently to build administrative and personnel capacity to efficiently manage those funds in our program. We have finally reached a size where we feel comfortable beginning to pursue larger grants from entities like the NC Housing Finance Agency and Federal Home Loan Bank, and are in discussions with additional government units with the region about funding to support existing rehab and repair efforts in their jurisdictions. We expect that this process will not only bear fruit this year, but will continue to help us grow and serve more homeowners much more quickly in the coming years.

- Individuals – we conduct individual fundraising efforts through our board members and with our volunteers, and through several "employee giving" programs with various companies throughout the Triangle. We are a member of giving campaigns at IBM, Duke Energy Progress, Honeywell, GSK, and the State Employees Combined Campaign. We are also affiliated with both the Triangle United Way and the Chatham County United Way, where we not only receive annual grants, but also get donations designated through workplace giving campaigns each fall. This source has been the most challenging and time consuming to develop, and we believe it holds promise over time. Our board has become very engaged in this effort, and has directed the staff to commit more time to these efforts in 2015. We had a very successful 2014 campaign where we raised over $20,000, much more

than we had previously raised, and we anticipate significant growth in this area over the course of 2015 and beyond, as effort is expended to build this unrestricted support critical to our continued growth and health as an organization.

As one might expect, there is year to year fluctuation in the percentage of our budget that comes from each type of funding; however, we have developed a strategy that we believe to be sustainable, and one that will support the continued growth of the organization in the coming years.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

We work diligently to weave our services into this network, with an emphasis on filling the gaps that exist between these services and addressing the excess demand for critical repair and modification services across the Triangle.

- RTT has joined a partnership with Rebuilding Together, Inc., numerous other Rebuilding Together affiliates, and the National Center for Healthy Housing called the *Healthy Housing Challenge.* This partnership leverages the technical expertise and support of the National Center for Healthy Housing with the extensive home repair experience and volunteer resources of Rebuilding Together and its' affiliates.
- As mentioned above, we coordinate our Orange County activities with David Saiken and the Orange County Urgent Repair Program to ensure as many homeowners as possible get assistance efficiently and with minimal overlap.
- We actively refer clients to the weatherization program at the Joint Orange Chatham Community Action Agency (JOCCA). JOCCA has also referred clients to us whose homes need repair to make them eligible for weatherization. We can complete these repairs, and then refer the client back to JOCCA to get the home weatherized. Through this process, both agencies utilize their strengths to expand the services that are available to low-income homeowners. We employ the same process with Resources for Seniors of Wake County and Operation Breakthrough in Durham.
- We also work to coordinate our efforts with other repair and modification programs throughout our service area, such as:
    - Strong Women Organizing Outrageous Projects (SWOOP) has a ramp program and completes exterior painting and landscaping.
    - Habitat for Humanity conducts Brush with Kindness programs focused on exterior maintenance across our four-county service area.
    - Habitat for Humanity (in Wake and Durham counties) is also creating critical repair programs to address repairs that extend beyond the scope of their Brush with Kindness program.
    - Resources for Seniors of Wake County and Chatham County Affordable Housing coordinate critical repairs through the North Carolina Housing Finance Agency's Urgent Repair Program. We routinely work with these agencies to ensure that low-income

homeowners can get the full range of repair and modifications services needed through the most efficient manner possible.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

RTT serves clients without regard to race, ethnicity or any other protected class. To ensure that our services are available to those who need them, we have carefully cultivated relationships with numerous social service agencies, councils on aging, home health agencies, housing partners and other human service organizations that work with the populations we serve. We rely on the organizations familiar with the needs of their clients to direct homeowners to us, reducing the need for us to do client outreach with our limited staffing resources.

Instead, we invest time in reaching out to these agencies to educate them about the work we do, and encourage them to utilize us as a resource for the low-income homeowners with whom they work. This practice has produced a diverse pool of qualified applicants at a pace that far outstrips our current ability to complete repair work; currently, RTT has a waiting list of over 250 qualified applicants.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition		x	x	x
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing		x	x	x
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 2014	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
80% of homeowners served indicate improved sense of well-being as a result of the repairs/modifications/upgrades completed.	Volunteers and contractors complete critical home repairs, modifications, and health and safety upgrades for low-income homeowners living in dangerous, unhealthy homes.	Out of 47 homeowners served in 2014, 41 indicated an improved sense of well-being to the interviewer. That is an 87% success rate.	A post-intervention survey was conducted within 60 days of the project completion.
80% of homeowners served indicate an enhanced ability to live independently and/or remain in their own home.	Volunteers and contractors complete critical home repairs, modifications, and health and safety upgrades for low-income homeowners living in dangerous, unhealthy homes.	Out of 47 homeowners served in 2014, 42 indicated an enhanced ability to live independently and/or remain in their own home. That is an 89% success rate.	A post-intervention survey was conducted within 60 days of the project completion.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 2015	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
80% of homeowners served indicate improved sense of well-being as a result of the repairs/modifications/upgrades completed.	Volunteers and contractors complete critical home repairs, modifications, and health and safety upgrades for low-income homeowners living in dangerous, unhealthy homes.	Out of 60 homeowners we plan to serve in 2016, at least 48 will indicate an improved sense of well-being to the interviewer. That will be an 80% success rate.	A post-intervention survey was conducted within 60 days of the project completion.
80% of homeowners served indicate an enhanced ability to live independently and/or remain in their own home.	Volunteers and contractors complete critical home repairs, modifications, and health and safety upgrades for low-income homeowners living in dangerous, unhealthy homes.	Out of 60 homeowners we plan to serve in 2015, at least 48 will indicate an enhanced ability to live independently and/or remain in their own home. That is an 80% success rate.	A post-intervention survey was conducted within 60 days of the project completion.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Rebuilding Together of the Triangle

PROGRAM REVENUE	Actual 2013	Estimated 2014	Projected 2015	Percent Change
Private Donations	$ 84,958	$ 97,774	$ 229,450	135%
Program Generated Revenue (fees)	$ -	$ -	$ -	0
Local Government Grants:				
Orange County	$ -	$ -	$ -	0
Town of Chapel Hill	$ 5,000	$ 5,000	$ 5,000	0%
Town of Carrboro	$ 3,000	$ 6,000	$ 6,000	0%
Other Local: Chatham County	$ 17,000	$ 22,000	$ 24,000	9%
Other Local: City of Raleigh	$ 15,000	$ -	$ -	0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 8,205	$ 9,398	$ 11,000	17%
State Government	$ 18,750	$ -	$ 37,500	0
Federal Government	$ -	$ -	$ -	0
Other Grants: United Way of Chatham County	$ 6,925	$ 6,925	$ 9,000	30%
Other Grants:				0
Miscellaneous/Other Revenue	$ 59,130	$ 112,298	$ 50,775	-55%
Please list 3 largest Miscellanous sources:				
Rebuilding Together National '1 $ 114,200.00				
Carolina Meadows '14 $ 15,000.00				
$ -				
Total Program Revenue	**$ 217,968**	**$ 259,395**	**$ 372,725**	**44%**
PROGRAM EXPENSES				
Compensation	$ 65,096	$ 87,485	$ 114,325	31%
Rent & Utilities	$ 1,992	$ 3,667	$ 6,800	85%
Supplies & Equipment	$ 6,325	$ 5,988	$ 13,345	123%
Travel & Training	$ 13,352	$ 12,675	$ 13,600	7%
Other Expenses:	$ 135,313	$ 147,299	$ 222,663	51%
Please list 3 largest "Other Expenses":				
Building Materials '14 $ 85,692.00				
Skilled Project Labor '14 $ 25,705.36				
ebuilding Together Nat'l Dues '' $ 11,650.00				
Total Program Expenses	**$ 222,077**	**$ 257,114**	**$ 370,733**	**44%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (4,109)**	**$ 2,281**	**$ 1,992**	**-13%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: Critical repairs provided for one family at one unduplicated address

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual 2013	37	37	222,077	6,002
Estimated 2014	46	46	257,114	5,589
Projected 2015	60	60	370,733	6,179

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013	Estimated 2014	Projected 2015	*Client characteristics*	Actual 2013	Estimated 2014	Projected 2015
1. **Gender**				4. **Geographic Location(s)**			
Male	34	36	47	Durham City	19	2	6
Female	45	53	70	Durham County	19	2	6
2. **Ethnicity**				Raleigh City	24	29	40
African-American	45	52	67	Wake County	39	54	60
Caucasian	31	32	41	Town of Chapel Hill	2	10	12
Hispanic	0	1	4	Town of Carrboro	2	0	3
Other	3	4	4	Orange County	8	16	25
3. **Age**				Other (specify) Chatham County	13	17	30
0-5 Years	3	3	4				
6-18 Years	12	12	14	Per cent of clients at, or below, federal poverty level	16%	17%	20%
19-50 Years	20	21	28				
51+ Years	38	53	70				
Unknown	6	0	2	***TOTAL # OF CLIENTS SERVED***	79	89	116

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Rebuilding Together of the Triangle

PROGRAM REVENUE	Actual 2013	Estimated 2014	Projected 2015	Percent Change
Private Donations	$ 99,950	$ 115,028	$ 277,000	141%
Program Generated Revenue (fees)	$ -	$ -	$ -	0
Local Government Grants:				
Orange County	$ -	$ -	$ -	0
Town of Chapel Hill	$ 5,000	$ 5,000	$ 5,000	0%
Town of Carrboro	$ 3,000	$ 6,000	$ 6,000	0%
Other Local: Chatham County	$ 17,000	$ 22,000	$ 24,000	9%
Other Local: City of Raleigh	$ 15,000	$ -	$ -	0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 8,205	$ 9,398	$ 11,000	17%
State Government	$ 18,750	$ -	$ 37,500	0
Federal Government	$ -	$ -	$ -	0
Other Grants: United Way of Chatham County	$ 6,925	$ 6,925	$ 9,000	30%
Other Grants:				0
Miscellaneous/Other Revenue	$ 82,603	$ 138,820	$ 67,000	-52%
Please list 3 largest Miscellanous sources:				
Rebuilding Together National '1 $ 114,200.00				
Carolina Meadows '14 $ 15,000.00				
$ -				
Total Program Revenue	**$ 256,433**	**$ 303,171**	**$ 436,500**	**44%**
PROGRAM EXPENSES				
Compensation	$ 76,583	$ 102,923	$ 134,500	31%
Rent & Utilities	$ 2,343	$ 4,314	$ 8,000	85%
Supplies & Equipment	$ 7,441	$ 7,045	$ 15,700	123%
Travel & Training	$ 15,708	$ 14,912	$ 16,000	7%
Other Expenses:	$ 159,192	$ 173,293	$ 261,957	51%
Please list 3 largest "Other Expenses":				
Building Materials '14 $ 85,692.00				
Skilled Project Labor '14 $ 25,705.36				
ebuilding Together Nat'l Dues ' $ 11,650.00				
Total Program Expenses	**$ 261,267**	**$ 302,487**	**$ 436,157**	**44%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (4,834)**	**$ 684**	**$ 343**	**-50%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Rebuilding Together of the Triangle

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013	Estimated 2014	Projected 2015	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1.00	75%	52,500	55,000	57,500	13%	
Program Director	1.00	95%	10,000 (partial year)	32,000	36,000	8%	
Field Operations Manager* (To be filled Feb 2015)	1.00	100%	0	0	28,000	6%	
Construction Manager (Volunteer)	.50	100%	0	0	0	0%	

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: Total Volunteer Hours = Volunteer FTE
  1,960

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: ROGERS- EUBANKS NEIGHBORHOOD ASSOCIATION (RENA)

Street Address: 101 Edgar Street

Mailing Address P.O. Box 16903, Chapel Hill, N.C. 27516

Website Address: www.rena-center.com

Executive Director: Robert L. Campbell

Telephone: 919-933-6210 E-Mail: rplcampbell@gmail.com

Contact Person: David Caldwell Telephone: 919-967-4442 (h) 919-918-2822 (center) E-Mail: davcald778@aol.com

Fax: Federal ID Number: EIN: 26-1313267

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$5,000	$20,000.00
Rogers Eubanks Neighborhood Association (RENA)'s goal is to close the educational gap through our year-round tutoring and mentoring programs. RENA is requesting funding for its Summer Enrichment Camp, which is open to 95 rising first through tenth graders. This six-week, full day camp curriculum based on the Orange County and Chapel Hill-Carrboro City School Learning Links modules will focus on teaching literacy, math, and science skills, as well as environmental awareness and stewardship. RENA will work with community residents to create stewardship volunteer(s) to work and to upkeep the community garden. RENA's Back to School Bash goal is to provide 500 backpacks filled with school supplies to 500 low-income students to create positive self esteem for the upcoming school year 2015 -2016.		
Town of Chapel Hill	$0	$20,000.00
Rogers Eubanks Neighborhood Association (RENA)'s goal is to close the educational gap through our year-round tutoring and mentoring programs. RENA is requesting funding for its Summer Enrichment Camp, which is open to 95 rising first through tenth graders. This six-week, full day camp curriculum based on the Orange		

County and Chapel Hill-Carrboro City School Learning Links modules will focus on teaching literacy, math, and science skills, as well as environmental awareness and stewardship. RENA will work with community residents to create stewardship volunteer(s) to work and to upkeep the community garden. RENA's Back to School Bash goal is to provide 500 backpacks filled with school supplies to 500 low-income students to create positive self esteem for the upcoming school year 2015 -2016.		
Town of Carrboro	$.0	$20,000.00
Rogers Eubanks Neighborhood Association (RENA)'s goal is to close the educational gap through our year-round tutoring and mentoring programs. RENA is requesting funding for its Summer Enrichment Camp, which is open to 95 rising first through tenth graders. This six-week, full day camp curriculum based on the Orange County and Chapel Hill-Carrboro City School Learning Links modules will focus on teaching literacy, math, and science skills, as well as environmental awareness and stewardship. RENA will work with community residents to create stewardship volunteer(s) to work and to upkeep the community garden. RENA's Back to School Bash goal is to provide 500 backpacks filled with school supplies to 500 low-income students to create positive self esteem for the upcoming school year 2015 -2016.		

Executive Director Board Chair

Date Date

Section I: Agency and Program Overview

- Please provide a brief history of the agency– including mission, date of incorporation and years of operation.
    - Date of Incorporation: The 29th day of Oct, 2007
    - Years in Operation: 42 years without incorporation, 7 years incorporated as a nonprofit 501(c)(3)

- Mission or Vision Statement (if applicable): Rogers-Eubanks Neighborhood Association (RENA) seeks to address the environmental, educational and public health issues impacting the residents of our community and to promote a vision of environmental justice and sustainability among residents, partners and other similarly impacted communities.

- Brief History of Agency: RENA works in the Rogers-Eubanks neighborhood, a historically African-American, low-income community that has transformed into a very diverse community including many Latino, Burmese, and many ethnic refugee families. RENA reflects the diversity of Orange County as a whole. Since becoming a 501(c)(3) organization in 2007, RENA has worked on several local task forces working with municipal governments to improve the social and economic experience of this low-income community, subject to environmental degradation associated with having the Orange County Regional Landfill in our community since 1972. RENA's work has created many partners across North Carolina and in other states addressing social inequities to improve the quality of life for all people.

Please answer questions 2 through 7 below regarding the specific program(s) for which the agency is requesting funding (not for the entire agency**). If** more than one program is requesting funding, please identify each by labeling, Ie: program 1, program 2, etc. Under each question.

- Describe the identified community need(s) the Program(s) funded will address.

  RENA will work to close the educational gap across race and class through participation in our afterschool tutoring and mentorship program, and through Summer Enrichment Camp.

  RENA will partner with our Habitat for Humanity neighbors to grow our Community Garden, bringing fresh vegetables to residents who need them, and engaging diverse neighbors through growing culturally relevant foods.

  Our annual Back to School Bash, which has been running for over 30 years, helps us celebrate our youngest scholars, engaging all neighbors in the important task of equipping pre-k-12 students with backpacks full of school supplies. In fall of 2014, we distributed over 500 backpacks.

- Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

We recently moved into our brand-new 4000 square foot community center that was awarded to the Rogers-Eubanks community by local governments as compensation for promises made in 1972 at the time that the landfill project began. We are so thankful for this new community hub, housing our educational efforts, community organizing, food justice distribution projects, recreation, unity-building gatherings, and community garden. This building is a testament to our community's victory over injustice, and we hope in time to fill it with educational and historical recognition reflecting just how far we've come. In order to staff these programs and the operation of the center in a manner that will ensure they thrive, we will need more funding than we have scraped by with in the past. For this reason, we are working hard towards growing a diversity of funding streams-- foundational and municipal grants, grassroots fundraisers, and small donations.

- Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

  We are currently applying for Strowd Roses and Z Smith Reynolds funding. These are not ongoing, in the sense that the funds are committed yet, but we have received funds from these sources in the past and feel hopeful about our current applications. Outside Agency funding from Town of Carrboro, Town of Chapel Hill, and Orange County would make a tremendous difference in RENA's work. Thank you for considering our application!

- Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)
  - **North Carolina Environmental Justice Network**- RENA plays an educational role and has won two awards in recent years in recognition of our organizing work
  - **Justice United**- instrumental in giving a snapshot of the diversity of those negatively impacted by the landfill, and helping push back against the waste transfer station
  - **UNC Chapel Hill, the Bonner Scholars Program, the Campus Y, the Public Health School, Engineers without Borders, UNC Center for Civil Rights and other socially-engaged academic scholars** have all helped strengthen our programs as volunteers, researchers, educators, and allies
  - **Marian Cheek Jackson Center for Saving and Making History**- helped gather and preserve the stories of neighborhood residents and related data to help us build and present our case before the local governments
  - **Orange County, Carrboro, and Chapel Hill governments**- the Rogers Road small area task force has offered a unified table with neighborhood leaders to work together toward solutions to the unique challenges the Rogers-Eubanks community faces. The municipal governments recognize the need for, and are helping strengthen, the new community center that we hope will be a site of neighborhood-rooted revitalization

- **Human Resource Center**- The children who participate in RENA programs unite with HRC's children to play soccer, play softball, and enjoy movie nights
- **Habitat for Humanity**- H4H residents participate in Community Unity Board, our primary coalitional vehicle, and attend neighborhood celebrations, Back to School Bash, and other functions
- **Faith Tabernacle Oasis of Love International Church**- hosts community meetings and other functions as needed. Allowed us to conduct afterschool tutoring, Summer Enrichment Camp, and the Back to School Bash here while we waited for the new community center to be built. Congregation members make small donations to support our work.
- Congregants and leadership of **United Methodist, United Church of Christ, The Advocate Episcopal, Unitarian Universalist Church on Purefoy** have offered small donations to support our work, and they are dependable allies when we seek community support for our justice work

- How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

  Newsletter, website, personal contacts in local schools, collaboration with other organizations. All programs and flyers are distributed in several languages whenever possible. We are deeply invested in long-term relationship-building with our neighbors of all cultural experiences, and we have seen the positive effects of these efforts in the diverse turnout at all of our community events and in our program participants.

- Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	x	x	x	x
Health and Nutrition	x	x	x	x
Job Training	x	x	x	x
Sports and Arts Activities	x	x	x	x
Pre-School Activities	x			
After-School Activities	x			
Mentoring	x	x	x	x
Transportation	x	x		
Housing	x	x		x
Other				

Section II: Program Results

- **FY 2013-14 Programs and Outcomes**

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Volunteers, children and community working together to feed underserved population.	Prepare the garden, planting, weeding harvesting and distributing produce.	Approximately 30 households will benefit receiving free produce throughout the growing and harvesting season.	Sign in sheets for all participates, hours recorded, and list of produce and amount distributed.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

- **FY 2014-15 Programs and Anticipated Outcomes**

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Move the garden to a large location to serve a larger community	Prepare the new garden for planting, weeding, harvesting and distributing produce.	Approximately 50 households will benefit receiving free produce throughout the growing and harvesting	Sign in sheets for all participates, hours recorded, and list of produce and amount

population, volunteers, children and community working together to feed underserved population.		season.	distributed.

Section III. Program Budget
(Excel file)

Agencies must still send a copy of the MS Excel file with their electronic application, even if they choose to embed the MS Excel table, on this page. The MS Excel file can be found here.

- Please complete a Program Budget Excel Form **for each requested program.** The Program Budget should reflect only figures and amounts associated with the Program(s) for which you are seeking funding and not the total agency budget.

- If the program's finances experienced significant changes that you would like to explain, please use the space below.

Section IV: Program Statistics and Costs
If you are seeking funding for more than one Program, please submit separate form for each.

Fiscal Year	**Total Program Units**	**Total Program Units that Met Program Goals**	**Total Program Cost**	**Program Unit Cost++** = Total Program Cost Total Program Units that Met Goal
Actual FY13-14	20	25%	12.50	12.50=1
Estimated FY14-	20	50%	15.00	25 =1

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **RENA Back to School Bash**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 500	$ 500	$ 500	0%
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 2,500	$ 2,500	$ 20,000	700%
Town of Chapel Hill			$ 20,000	0
Town of Carrboro			$ 20,000	0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Jackson Center	$ 5,000			0
Other Grants: Z Smith Reynolds	$ 9,250			0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 17,250**	**$ 3,000**	**$ 60,500**	**1917%**
PROGRAM EXPENSES				
Compensation				0
Rent & Utilities				0
Supplies & Equipment				0
Travel & Training				0
Other Expenses:				0
Please list 3 largest "Other Expenses":				
*Back Packs and Supplys $ 5,000.00				
Food $ 3,000.00				
$ -				
Total Program Expenses	**$ -**	**$ -**	**$ -**	**0**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 17,250**	**$ 3,000**	**$ 60,500**	**1917%**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: RENA Garden

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations			$ 500	0
Program Generated Revenue (fees)	$ -	$ -	$ 500	0
Local Government Grants:				
Orange County			$ 500	0
Town of Chapel Hill				0
Town of Carrboro				0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Jackson Center	$ 500			0
Other Grants: Z Smith Reynolds	$ 500			0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 1,000**	**$ -**	**$ 1,500**	**0**
PROGRAM EXPENSES				
Compensation				0
Rent & Utilities				0
Supplies & Equipment	1.000.00		$ 2,000	0
Travel & Training				0
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Program Expenses	**$ -**	**$ -**	**$ 2,000**	**0**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 1,000**	**$ -**	**$ (500)**	**0**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **RENA Summer Camp**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 549		$ 1,500	0
Program Generated Revenue (fees)			$ 7,500	0
Local Government Grants:				
Orange County			$ 15,000	0
Town of Chapel Hill	$ 10,000		$ 15,000	0
Town of Carrboro	$ 5,000		$ 15,000	0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 15,549**	**$ -**	**$ 54,000**	**0**
PROGRAM EXPENSES				
Compensation				0
Rent & Utilities	$ 5,380			0
Supplies & Equipment	$ 2,225		$ 3,000	0
Travel & Training				0
Other Expenses:	$ 13,065		$ 20,000	0
Please list 3 largest "Other Expenses":				
Staff Salary $ 9,065.00				
Consultant $ 4,000.00				
$ -				
Total Program Expenses	**$ 20,670**	**$ -**	**$ 23,000**	**0**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (5,121)**	**$ -**	**$ 31,000**	**0**

15				
Projected FY15-16	30	100%	20.00	50=1

- **Define one unit of service[+]:**

  1 person

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS											
Program: Garden											
Client characteristics		Actual 2013-14	Estimated 2014-14	Projected 2015-16	***Client characteristics***		Actual 2013-14	Estimated 2014-15	Projected 2015-16		
1.	**Gender**				4.	**Geographic Location(s)**					
	Male	6	6	12		Durham					

						City			
_	Female	4	4	15	_	Durham County	_	_	_
2.	**Ethnicity**	_	_		_	Raleigh City	_	_	_
_	African-American	4	7	12	_	Wake County	_	_	_
_	Caucasian	1	3	6	_	Town of Chapel Hill	_	_	
_	Hispanic	0	0	0	_	Town of Carrboro	1	4	5
_	Other	0	0	0	_	Orange County	4	6	15
3.	**Age**	_	_		_	Other (specify)	_	_	
_	0-5 Years	0	3	6	_	_			
_	6-18 Years	_	_		Per cent of clients at, or below, federal poverty level		_ _	_ _	
_	19-50 Years	4	3	6	_	_			
_	51+ Years	1	4	8	_	_	_ _	_ _	
_	Unknown	_	_	_	***TOTAL # OF CLIENTS SERVED***				

Section VI.

Comparative Budget for Entire Agency
(Excel file)

Agencies must still send a copy of the MS Excel file with their electronic application, even if they choose to embed the Excel table, on this page. The MS Excel file can be found here.

- Please complete a Comparative Budget Excel Form **for the entire agency.** This budget form is required, even if the figures match the Program Budget Form(s).

- If the agency's finances experienced significant changes that you would like to explain, please use the space below.

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Rogers/Eubanks Neighborhood Association

Position Titles * = Position	**Full Time Equivalent****	**Program Staff +**	**Actual 2013-14**	**Estimated 2014-15**	**Projected 2015-16**	**% Total Budget**	**If provided, indicate:**

Vacant							**(R) Retirement Plan (H) Health Plan**
Community Engagement Garden Director (Mariam Peppers)	1 unit	8 hrs a month(7 months)	2 hrs a week	2 hrs a week	2 hrs a week	$560.00	N/A
Volunteer hours(This FTE does not include the volunteer hrs of the positions above)	1 unit	0	10 hrs	20 hrs	40 hrs	0	N/A

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: Total Volunteer Hours = Volunteer FTE

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: **Senior Care of Orage County; Inc.**

Street Address: 105 Meadowland Drive, Hillsborough, NC 27278

Mailing Address: P.O. Box 8181, Hillsborough, NC 27278

Website Address: www.soltysdayhealth.org

Executive Director: Alvonia Baldwin

Telephone: 919-245-2017 E-Mail: albaldwin@orangecountync.gov

Contact Person: Alvonia Baldwin

Telephone: 919-245-2017 E-Mail: albaldwin@orangecountync.gov

Fax: 919-245-2018 Federal ID Number: 56-2460614

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	**** Note****** **$25,000**	**** Note****** **$25,000**
Summary of intended use of funds: The Orange County Funding is critical for the continuation of the financial support provided to The Florence Gray Soltys Adult Day Health Program operated by Senior Care of Orange County; Inc. Funding towards this one of a kind dual model; Adult Day Care and Health Program in Orange County will provide participant scholarships for clients in need of a program that may be limited to the affordability, caregiver respite due to the severely frail elderly and adults with special needs, program operational support with purchase of program supplies, snacks, personnel and community resources for the continued sustainability of the program and as a partnership with the county towards meeting the goals of the Master Aging Plan of Orange County. ******Note***: **Note*** Note: Since 2011-2015 The Orange County amount has included up to $25,000 in participant meal credits. The above is not a reflection of the meal credit amount. The in-kind donation is still needed for the meals. ($50,000 include the meals)***		
Town of Chapel Hill	$	$
Summary of intended use of funds:		
Town of Carrboro	$	$

Summary of intended use of funds:

_____	_____
Executive Director	Board Chair
_____	_____
Date	Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

a. Date of Incorporation:

Senior Care of Orange County, Inc. was incorporated in March, 2004.

b. Years in Operation:

The program began offering services on March 28, 2004, and through 2014 has served 179 participants and their caregivers. The County of Commissioners passed a resolution of a name change to The Florence Gray Soltys Adult Day Health Program on April 20, 2010.

c. Mission or Vision Statement (if applicable):

The mission of the Soltys Adult Day Health Program remains the same, by providing social and health services to frail, disabled and isolated adults 18 years and older with special needs that will benefit from Adult Day Health programs. Stimulating activities, enriching programs, provision of nutritious meals and snacks as well as rehabilitative services are offered. The program also provides respite and education for family members and caregivers. The primary goal is to prevent or delay the onset of institutionalization of participants.

The vision of Senior Care of Orange County, Inc. is to advocate, establish and operate programs that provide services for frail or disabled older adults to remain in their homes with family as long as possible. The 65 and older adult is the fastest growing population segment.

d. Brief History of Agency:

In 2003, Central Orange Adult Day Health Program (formally) was under the auspicious of the Orange County Department on Aging. In 2004, the program assumed a non-profit 501c-3 status under the Governing Board of Senior Care of Orange County; Inc. Through the years the operation remained adjacent to the Central Orange Senior Center and was licensed for 10 participants per day. As the need in the county continued to grow, the program later expanded to hold a license of 29 participants per day on February 4, 2009 as a partnership with the county to continue to work towards meeting the goals of the Master Aging Plan of Orange County.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

The Florence Gray Soltys Adult Day Health Program is a therapeutic, health-focused program for adults and seniors that offer a variety of services in a home-like setting that is open from 7:30am to 5:30pm, Monday-Friday.

The relocation of the program, to a new and larger location in close relation with the County Department on Aging has help a lot. The need of this program is growing rapidly as more seniors age in place with various diagnosis ranging from, but not limited to dementia, Parkinson's disease, CVA and Diabetes. The existing space continues to allow more opportunities for families to feel reassured of the care and safety that their loved one receives. From year to year, the numbers enrolled continues to grow. Currently the program is averaging 25 participants per day, with a licenses capacity for up to 29 on any given day.

The Senior Care Board continues to work toward building stronger relationships with the Veteran's Administration Community referral program, and establishing a partnership with the local Veterans Affairs Office, Discharge Planners at the local Hospitals to aid in the referral program.

Additional In-kind support still remains from Carol Woods Retirement Community with a representative which serves on the Senior Care Board of Directors.

Efforts continue to recruit participants from the Department of Social Services (Medicaid CAP/DA) and the Veteran's Administration who will financially support the participants with low incomes and to encourage them to utilize the Day Health Program as an option to home care. The program will reapply for the Home Community Care Block Grant from Triangle J Council of Governments.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Operations changes being considered for the FY 2015-16:

- Improving benefits for full time and part time service staff.
- Establishing a large year end fund balance to cover fixed operational expenses when there is a quick and dramatic reduction with the current population that we serve, *(i.e. participant who die or move to a higher level of institutional care.)*
- Continued support with Carol Woods assistance to better manage the program's finances.
- Continue to work toward building stronger referral program with the Veteran's Administration, the local Veterans Affairs Office, and discharge planners at local hospitals.

4. Describe plans for securing sustainable revenue sources for the Program(s) to be funded– include outside funding as well revenue generated within your agency.

Increasing annual or sustained gift programs is another revenue source. We have established the Florence Gray Soltys Memorial Scholarship fund where individuals can donate throughout the year. The way we generate this fund is through newsletters, postings on our website, direct mail lists, e-mail lists, phone lists, etc. We will also seek in kind gifts and work

diligently on fundraising, which will develop these funding sources into a long-term support of the programs.

5. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

- Increasing annual or sustained gift programs is another revenue source. We have established the Florence Gray Soltys Memorial Scholarship fund for Private donations throughout the year. The way we generate this fund is through newsletters, postings on our website, direct mail lists, e-mail lists, phone lists, etc.
- Continue to seek in kind gifts and work diligently on fundraising, which will develop these funding sources into a long-term support of the program.
- We will also include one or more fundraising programs that generate sustainable gift support on an annual basis.

- Ongoing external revenue sources i.e. Eldercare Respite through the Department on Aging, Home Community Care Block Grant (HCCBG), Department of Social Services- State and County Funding and Veteran's Administration funds to help subsidize low income and Veteran clients.

- Additional resources are funding through the State Employee Combined Campaign, The Strowd Roses Foundation, private donations and the Triangle Community Foundation. In addition, we continue to seek and receive, CAP/DA an affiliate of Medicaid and the Dept. of Social Services.

6. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- We have established a relationship with the Veterans' Administration (hospital based in Durham, NC). This continues to become a stronger referral base for us as we focus on our Aging Veterans in the community.
- We also work closely with the Department on Aging's Eldercare Respite Program; support for caregivers.
- Collaborate with NC Alzheimer's Association which is ongoing.
- Contract with a community based physical and occupational Therapy Organization.
- We continue to seek volunteers throughout the community – often being met through our relationship with other human services agencies (i.e. Central Orange Senior Center, Seymour Center and other non-profit and for profit agencies).
- We periodically work with interns in various human services fields provided through UNC Hospital and the University (i.e. occupational therapy, social work, and nursing students.)
- We have a continued relationship with the Orange County Department of Social Services and the Health Department in monitoring our program for quality assurance.

7. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

The Florence Gray Soltys Adult Day Health Program markets through our local senior centers, through the Orange County Department on Aging Eldercare Services, community churches and synagogues; various media by press releases, Department of Social Services and other community agencies that serve ethnic, minority groups as well as low income citizens. Our program beneficiary characteristics chart indicates that the Adult Day Health Program has been very successful in reaching and actually serving minority groups. In FY 2014-15 minorities comprised 46% of participants compared to 19% minority for the targeted service population of older adults age 60+ in previous years.

8. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition		X	X	X
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other (Adult Day Care/Health Program)		X	X	X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
To prevent/prolong 75% of participants with health conditions from becoming institutionalized during a one-year period of time.	Counsel and meet with caregivers as needed, provide a plan of care quarterly along with health care monitoring and continuous support and resourcing.	The Program provided a daily average range of 22 - 25 participants each day with a safe, stimulating and enriching health care program. Due to the frail population that we serve, 75% of the clients prevented institutionalization within a year. Unfortunally; 5% were below goal for FY 2013-14.	Participant records maintained monthly to verify reasons for discharge from the program. (i.e. to nursing home, In -home care and deceased).

If program(s) did not meet its stated goal(s), please explain:

Due to the frail population that we serve, 75% of the clients prevented institutionalization within a year. Unfortunally; 5% were below our set goal for FY 2013-14 of 80%.
Census also reflected that 6% of clients enrolled have been with the program for over three years.

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program. N/A

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Senior Care of Orange County; Inc.

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 3,500	$ 3,000	$ 3,000	0%
Program Generated Revenue (fees)	$ 288,897	$ 296,490	$ 296,490	0%
Local Government Grants:				
Orange County	$ 25,000	$ 25,000	$ 25,000	0%
Town of Chapel Hill	$ 1,500	$ 1,500	$ 2,000	33%
Town of Carrboro	$ 1,000	$ 1,000	$ 1,000	0%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	$ 319,897	$ 326,990	$ 327,490	0%
PROGRAM EXPENSES				
Compensation	$ 272,954	$ 273,756	$ 273,756	0%
Rent & Utilities	$ 1,561	$ 1,561	$ 1,561	0%
Supplies & Equipment	$ 15,000	$ 15,058	$ 15,058	0%
Travel & Training	$ 1,000	$ 1,920	$ 1,920	0%
Other Expenses:	$ 27,000	$ 27,536	$ 27,536	0%
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Program Expenses	$ 317,515	$ 319,831	$ 319,831	0%
SURPLUS/(DEFICIT) FOR PERIOD:	$ 2,382	$ 7,159	$ 7,659	7%

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: (6 – 10 hours/day)

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	6718	6718	$328,220	$48.85
Estimated FY14-15	6639	6639	$324,323	$48.85
Projected FY15-16	6639	6639	$324,323	$48.85

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Senior Care of Orange County; Inc.

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	44	46	52	Durham City	0	0	0
Female	30	36	36	Durham County	7	8	9
2. **Ethnicity**				Raleigh City	0	0	0
African-American	21	24		Wake County	0	1	1
Caucasian	51	54		Town of Chapel Hill	5	7	8
Hispanic	1	2		Town of Carrboro	3	5	5
Other	1	2		Orange County	52	53	56
3. **Age**				Other (Person & Alamance)	7	8	9
0-5 Years							
6-18 Years				Per cent of clients at, or below, federal poverty level	5	6	6
19-50 Years	2	2	3				
51+ Years	72	80	85				
Unknown				***TOTAL # OF CLIENTS SERVED***	74	82	88

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Senior Care of Orange County; Inc.

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 3,500	$ 3,000	$ 3,000	0%
Agency Generated Revenue (fees)	$ 288,897	$ 296,490	$ 296,490	0%
Local Government Grants:				
Orange County	$ 25,000	$ 25,000	$ 25,000	0%
Town of Chapel Hill	$ 1,500	$ 1,500	$ 2,000	33%
Town of Carrboro	$ 1,000	$ 1,000	$ 1,000	0%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	$ 319,897	$ 326,990	$ 327,490	0%
AGENCY EXPENSES				
Compensation	$ 272,954	$ 273,756	$ 273,756	0%
Rent & Utilities	$ 1,561	$ 1,561	$ 1,561	0%
Supplies & Equipment	$ 15,000	$ 15,058	$ 15,058	0%
Travel & Training	$ 1,000	$ 1,920	$ 1,920	0%
Other Expenses:	$ 27,000	$ 27,536	$ 27,536	0%
Please list 3 largest "Other Expenses":				
Insurance $ 17,274.00				
Participant Snacks $ 7,901.00				
Transportation $ 2,361.00				
Total Agency Expenses	$ 317,515	$ 319,831	$ 319,831	0%
SURPLUS/(DEFICIT) FOR PERIOD:	$ 2,382	$ 7,159	$ 7,659	7%

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Senior Care of Orange County; Inc.

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Program Director	1.00	1.0	64,888	64,888	64,888		n/a
Office Manager	.75	.75	n/a	28,000	28,000		n/a
Registered Nurses	1.00	1.0	38,000	38,000	38,000		n/a
Certified Nursing Assistants	3.50	3.50	81,050	81,050	81,050		n/a
Activity Coordinator	1.00	1.0	17,000	17,000	17,000		n/a
Social Worker	.50	.50	23,000	23,000	23,000		n/a
			$223,938	$251,938	$251,938		

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: TABLE

Street Address: 205 W. Weaver St., Carrboro, NC 27510

Mailing Address: same

Website Address: tablenc.org

Executive Director: Ashton Chatham Tippins

Telephone: (919)636-4860 E-Mail: achatham.tablenc@gmail.com

Contact Person: Ashton Chatham Tippins

Telephone: same E-Mail: same

Fax: N/A Federal ID Number: 26-1471735

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$0	$7,000
Summary of intended use of funds: TABLE will use this grant to fund its Weekend Meal Backpack Program. This will include the purchase of food, equipment, and the payment of program staff.		
Town of Chapel Hill	$0	$10,000
Summary of intended use of funds: TABLE will use this grant to fund its Weekend Meal Backpack Program. This will include the purchase of food, equipment, and the payment of program staff.		
Town of Carrboro	$0	$7,000
Summary of intended use of funds: TABLE will use this grant to fund its Weekend Meal Backpack Program. This will include the purchase of food, equipment, and the payment of program staff.		

_____	_____
Executive Director	Board Chair
_____	_____
Date	Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 2008

   b. Years in Operation:7

   c. Mission or Vision Statement (if applicable): TABLE's mission is to provide healthy, emergency food aid every week to hungry children living in Chapel Hill and Carrboro, NC.

   d. Brief History of Agency: Since its start in 2008, TABLE has offered "a place at the TABLE" to increasing numbers of local hungry children. Thanks to generous donations of food, funds, and time by campus and community supporters, TABLE has quickly grown.

      2008: TABLE started delivering healthy food to 12 local elementary school children each week.

      2013/2014 School Year: TABLE's Weekend Meal Backpack Program provided weekly emergency food aid to 226 local hungry children. That's over 3 tons of food each month!

      2014/2015 School Year: TABLE expanded its programming to include kids in preschool, elementary school, and middle school (3 years - 14 years)! TABLE will begin serving 400 kids each week in February 2015.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

   TABLE's Weekend Meal Backpack Program will directly meet the needs of local children to obtain the food and nutrition they need all week long. Approximately 30% of children (from preschool to middle school) in the Chapel Hill-Carrboro School System are on free or reduced school lunches. This provides them with meals through the school week, but does not cover all nutrition needs. Our Weekend Meal Backpack Program seeks to fill these gaps by providing healthy food to children for weekends and school holidays when they do not have access to their free school meals.

Additionally, research states that hungry children are more likely to underperform in many areas. They often have health problems, behavioral problems, lower grades, lower attendance, and low self-esteem. TABLE helps to reduce these risks so that kids have a chance at a happy, healthy life! If we want our kids to succeed in life, let's start by providing them with nutritious foods.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.
The only financial changes being considered for FY 2015-16 is the addition of a Holiday Program in December. This would serve as a replacement program for the Weekend Meal Backpack Program at a few of our sites (where possible) and will accomplish a few things: 1) Provide extra food for the long winter break 2) Encourage sharing and kindness among the kids TABLE serves, and 3) Teach kids how to make fun, healthy holiday snacks! I estimate that the 2 weeks of this program would cost TABLE 30 percent more than what the Weekend Meal Backpack Program would cost us in those 2 weeks. We are really excited about the possibility of this program because we think it will make such an impact on our kids physically and psychologically! We believe that it is extremely important to provide our kids with plenty of food they need over school breaks as well as encourage sharing and caring for their neighbors.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.
Revenue sources for our Weekend Meal Backpack Program include:
    - Individual donors (ongoing)
    - Hamsa Foundation (ongoing)
    - Oak Foundation (ongoing)
    - PNC Foundation (ongoing)
    - Various events: Empty Bowls Event, Mediterranean Deli Event, Food Truck Rodeo (ongoing)
    - We will be applying for several new grants this year, some of which will include: Google, Food Lion Foundation, GenerationOn, Kroger Foundation (new)
    - State Employee's Combine Campaign (new)
    - Event with Root Cellar and local community woman (new)

This list is far from comprehensive. These are simply a few of our larger anticipated ongoing or new revenue sources for FY 2015-16.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)
TABLE works with multiple different organizations to make our Weekend Meal Backpack Program successful:
    - Chapel Hill-Carrboro Schools makes it possible for us to distribute food to their kids.
    - The Town of Chapel Hill Department of Housing has given us permission to serve kids at their apartment homes (Town-owned property).

- Hargraves After School Center allows us to serve kids at their location.
- We also work with various non-profits – El Centro Hispano, Human Rights Center, EmPOWERment – to provide food to kids at their locations.
- Farmer FoodShare donates fresh food for our kids. We also purchase produce from them on a weekly basis.

TABLE collaborates with a number of different organizations to provide healthy food to our kids. We know that we cannot take care of our kids without the entire community getting involved!

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

   We reach out to ethnic and minority groups by going to where those groups are visiting/living/going! For example, we work with El Centro Hispano and the Carrboro Human Rights Center to offer our services to Hispanic families. We also reach out to the communities of South Estes and Trinity Court/Pritchard Park to offer our services to local Asian families that live there.

   TABLE reaches out to ALL families in any way possible to provide them with healthy food. At the schools, we depend on school social workers to help us identify the children that are most in need. At the after school centers, we depend on the directors and staff to identify hungry children and obtain permission slips. At low-income housing, our Program Director and volunteers literally walk door-to-door to find out if there are kids in the home that could use extra food.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				
Health and Nutrition	X			
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
All children participating in TABLE's Weekend Meal Backpack Program are provided with healthy food every week.	TABLE delivers healthy non-perishables every week to kids through their school, after school center, or to their home.	All 226 students signed up to receive a bag of healthy food every week did receive this food. 100% result (met our goal)	TABLE keeps records of the number of kids served every week.
Children participating in TABLE's Weekend Meal Backpack Program are not hungry on weekends and school holidays.	TABLE provides food to local kids on Thursdays so they have food for weekends. We also provide extra food just before a school holiday.	All 226 students received food for the weekend. 92% of families say that they use the fresh food given to them.	Survey
Children have access to healthier food.	TABLE delivers healthy non-perishables every week to kids through their school, after school center, or to their home.	90% of families say that their children are able to eat healthier because of their participation in the Weekend Meal Backpack Program. 90% result (met our goal)	Survey

If program(s) did not meet its stated goal(s), please explain:

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: TABLE

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 248,078	$ 305,279	$ 380,000	24%
Program Generated Revenue (fees)	$ -	$ -	$ -	0
Local Government Grants:				
Orange County	$ -	$ 5,000	$ 7,000	40%
Town of Chapel Hill	$ -	$ 5,000	$ 7,000	40%
Town of Carrboro	$ -	$ 5,000	$ 7,000	40%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -	$ -	$ -	0
State Government	$ -	$ -	$ -	0
Federal Government	$ -	$ -	$ -	0
Other Grants:	$ -	$ -	$ -	0
Other Grants:	$ -	$ -	$ -	0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
Individual Donations $ 73,109.00				
ocal Orgs., Businesses, Church $ 39,064.00				
Foundations and Trusts $ 25,530.00				
Total Program Revenue	**$ 248,078**	**$ 320,279**	**$ 401,000**	**25%**
PROGRAM EXPENSES				
Compensation	$ 52,114	$ 58,253	$ 64,875	11%
Rent & Utilities	$ 25,045	$ 33,234	$ 40,000	20%
Supplies & Equipment	$ 92,555	$ 135,749	$ 201,744	49%
Travel & Training	$ 859	$ 1,200	$ 2,000	67%
Other Expenses:	$ 1,096	$ 3,630	$ 5,000	38%
Please list 3 largest "Other Expenses":				
Vehicle $ 1,096.00				
$ -				
$ -				
Total Program Expenses	**$ 171,669**	**$ 232,066**	**$ 313,619**	**35%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 76,409**	**$ 88,213**	**$ 87,381**	**-1%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: 1 bag of healthy food distributed to a local child. This includes healthy non-perishables, local produce, and fresh milk.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	7,424 (estimated)*	7,424	$92,554.96**	$12.47
Estimated FY14-15	11,850	11,475	$135,749.00**	$11.83
Projected FY15-16	16,800	16,800	$201,744.00**	$12.00***

*This number is estimated because we keep track of our food in weight. We don't typically keep track of the amount of food distributed by number of bags given out. However, we do keep track of the number of kids we serve. This number changes on a regular basis, but I was able to look back at records to determine the approximate number of children we served for a certain number of weeks. I estimated that we provided 200 bags of food each week for 10 weeks and 226 bags of food each week for 24 weeks. This gave me a total of 7,424 units of service.
**The total program cost is the amount of money AND food it required for us to distribute food through our Weekend Meal Backpack Program. It does NOT include the funds required for equipment, paying our Program Director, or renting space.
***Increased Program Unit Cost is due to the Holiday Program that we plan to put in place to provide even more food to our kids.

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Weekend Meal Backpack Program

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	49%	49%	49%	Durham City	0	0	0
Female	51%	51%	51%	Durham County	0	0	0
2. **Ethnicity**				Raleigh City	0	0	0
African-American	57%	54%	52%	Wake County	0	0	0
Caucasian	2%	2%	2%	Town of Chapel Hill	60%	60%	55%
Hispanic	26%	27%	27%	Town of Carrboro	40%	40%	45%
Other-Asian	15%	17%	19%	Orange County	0	0	0
3. **Age**				Other (specify)	<1% Chatham	<1% Chatham	<1% Chatham
0-5 Years	2%	5%	15%				
6-18 Years	98%	95%	85%	Per cent of clients at, or below, federal poverty level	75%	75%	75%
19-50 Years							
51+ Years					226	400	
Unknown				***TOTAL # OF CLIENTS SERVED***			550

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: TABLE

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 248,078	$ 305,279	$ 380,000	24%
Agency Generated Revenue (fees)	$ -	$ -	$ -	0
Local Government Grants:				
Orange County	$ -	$ 5,000	$ 7,000	40%
Town of Chapel Hill	$ -	$ 5,000	$ 7,000	40%
Town of Carrboro	$ -	$ 5,000	$ 7,000	40%
Other Local:	$ -	$ -	$ -	0
Other Local:	$ -	$ -	$ -	0
Other Local:	$ -	$ -	$ -	0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ -			0
State Government	$ -			0
Federal Government	$ -			0
Other Grants:	$ -	$ -	$ -	0
Other Grants:	$ -	$ -	$ -	0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
Individual Donations $ 73,109.00				
ocal Orgs., Businesses, Church $ 39,064.00				
Foundations and Trusts $ 25,530.00				
Total Agency Revenue	**$ 248,078**	**$ 320,279**	**$ 401,000**	**25%**
AGENCY EXPENSES				
Compensation	$ 79,438	$ 90,012	$ 102,500	14%
Rent & Utilities	$ 25,045	$ 33,234	$ 40,000	20%
Supplies & Equipment	$ 111,648	$ 152,757	$ 221,744	45%
Travel & Training	$ 859	$ 1,200	$ 2,000	67%
Other Expenses:	$ 14,628	$ 17,849	$ 19,669	10%
Please list 3 largest "Other Expenses":				
Payroll $ 8,959.00				
Contract Services $ 4,573.00				
Vehicle $ 1,096.00				
Total Agency Expenses	**$ 231,618**	**$ 295,052**	**$ 385,913**	**31%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 16,460**	**$ 25,227**	**$ 15,087**	**-40%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: TABLE

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget Based on FY 14-15	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1.00	50%	$42,000	$44,000	$45,000	13.7%	none
Program Director	1.00	100%	$29,004	$31,000	$32,000	9.7%	none
Projects Specialist	.25	25%	$8,438	$9,012	$9,500	2.8%	none
Community Outreach Coordinator	.50	50%	$0	$6,000 (hired 2/2015)	$16,000	1.9%	none
SnackChef Intern	.25 Unpaid	100%	$0	$0	$0	0	none
Operations Manager	<.25 Unpaid	100%	$0	$0	$0	0	none
Junior Intern	.25 Unpaid	95%	$0	$0	$0	0	none
Sophomore Intern	.25 Unpaid	95%	$0	$0	$0	0	none
Sophomore Intern	.25 Unpaid	95%	$0	$0	$0	0	none
Freshman Intern	.25 Unpaid	95%	$0	$0	$0	0	none

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: Total Volunteer Hours = Volunteer FTE

1,960

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **The Arc of the Triangle (formerly The Arc of Orange County)**

Street Address: 208 North Columbia Street, Suite 100, Chapel Hill, NC 27514

Mailing Address: same

Website Address: www.arctriangle.org

Executive Director: Robin Baker

Telephone: 919-942-5119 xt 117 E-Mail: rbaker@arctriangle.org

Contact Person: Susan Chandler

Telephone: 919-942-5119 xt 111 E-Mail: schandler@arctriangle.org

Fax: 919-942-2119 Federal ID Number: 56-1214133

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	4,000.00	$6,000.00
Summary of intended use of funds: The Arc of the Triangle provides supports and services to more than 240 children and adults with intellectual and developmental disabilities. A majority of our services are paid for through limited Medicaid or State funding. The funding that we are requesting would be used to offset the cost to provide educational and social experiences that are not funded through Medicaid or State funding.		
Town of Chapel Hill	$6,000.00	$12,000.00
Summary of intended use of funds: The Arc of the Triangle provides supports and services to more than 240 children and adults with intellectual and developmental disabilities. A majority of our services are paid for through limited Medicaid or State funding. The funding that we are requesting would be used to offset the cost to provide educational and social experiences that are not funded through Medicaid or State funding.		
Town of Carrboro	$3,000.00	$5,000.00
Summary of intended use of funds: The Arc of the Triangle provides supports and services to more than 240 children and adults with intellectual and developmental disabilities. A majority of our services are paid for through limited Medicaid or State funding. The funding that we are requesting would be used to offset the cost to provide educational and social experiences that are not funded through Medicaid or State funding.		

Robin Baker	Michael Madden
Executive Director	Board Chair, President
January 20, 2105	January 20, 2015
Date	Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 1979

   b. Years in Operation: 36

   c. Mission or Vision Statement (if applicable):

      The Arc of the Triangle works with and for people who have or are at risk for having intellectual and/or developmental disabilities. We strive to provide quality support to the individual, their family and the community in which they live. Additionally, the Arc seeks to promote the full participation of the people we serve in all areas of life in our community. The Arc seeks to accomplish this through advocacy, education, and community collaboration.

   d. Brief History of Agency:

      The Arc of Orange County (The Arc) was incorporated as a 501(c) (3) private, non-profit corporation in 1979 after more than twenty years of activity in Orange County. The Arc has been instrumental in helping people with intellectual and developmental disabilities find appropriate support and services in our community. Where none existed, The Arc worked towards their establishment, and provides some of the needed services through our organization. Recently, in 2014 the Arc of Orange County merged with our two neighboring Arc's – Arc of Durham and the Arc of Wake County to form the Arc of the Triangle in order to provide more comprehensive services to families and individuals throughout the Triangle.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

   People with Intellectual and Developmental Disabilities often lead lives that have limited opportunities for social inclusion and participation. Restricted and sedentary lifestyles significantly reduce quality of life. Funding for this program will go directly to coordinate and monitor activities that enable people with intellectual and

developmental disabilities become engaged with the community through the use of community volunteers, spaces and resources.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

   Last year, the state continued to reduce the amount of reimbursement for services we provide. One service, known as "Developmental Therapy" was completely eliminated. This meant a decrease of $190,000 to people that we continue to support. Our Local Management Entity (LME) has also moved 40% of the people we support to "non-habilitative" services that are reimbursed at a lower rate. We continue to serve these people in the same manner but with less pay. Lastly, on 1/1/2015 the LME changed the reimbursement rate for two of the services that we provide. The result is a $3000 per month reduction in funding.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

   During the coming year we will continue to receive ongoing funding from:

   The Cardinal Track Club- $6500.00/estimated
   The ZTA sorority- 12,000.00/estimated
   The Knights of Columbus-$3000.00/estimated
   Private donations $5000.00/estimated

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

   - The North Carolina Division of Vocational Rehabilitation (VR) - persons recommended to the Arc from VR find gainful work with Arc Supported Employment Specialists.
   - Cardinal Innovations Health Care Solutions- families and individuals are recommended to the Arc to receive Home and Community Support, Respite Care, Supported Employment, Social and Volunteer opportunities.
   - Meals on Wheels – Arc participants volunteer weekly delivering and preparing meals for Orange County Meals on Wheels Recipients.
   - Extraordinary Ventures (EV) – Arc participants are hired and employed at EV for a variety of jobs including Office Solutions, EV Laundry, EV Candlemaking, EV Pet sitting, as well as partnering in Friday Night Live a weekly evening at EV for friendship and fun for Teens and Adults with or without intellectual/developmental disabilities.
   - The Seymour Center – Arc participants volunteer weekly at the Seymour Center assisting/creating friendships with senior citizens, the Arc's Petals with a Purpose program supplies monthly lunch bouquets honoring senior birthdays that month.

- RSVP (Retired Seniors Volunteer Program) – senior citizen's volunteer with the Arc's social programs such as Petals with a Purpose and Spin class.
- UNC Wellness Center – Arc Spin, Weight and HOOPs basketball meet weekly at the health club at no charge to the Arc.
- The Chapel Hill Carrboro Chamber of Commerce – each fall the Chamber sponsors one Arc employee to participate in the Chapel Hill Carrboro Chamber's Leadership Series.
- The Hillsborough Chamber of Commerce – Arc staff speaks biannually to educate and encourage Hillsborough residents to utilize Arc services and programs.
- Several sororities and fraternities at UNC (APO, ZTA, Phi Beta Chi, PKP) Arc's volunteer programs are comprised with a large percentage of sorority and fraternity students, students organize major fundraisers for the benefit of the Arc (Tarheel 10 Miler, ZTA Race for the Cure).
- The Knights of Columbus – raise awareness and funding for the Arc's programs through the LAMB's Tootsie Roll event each year.
- The University Mall – welcoming attitudes on Fridays when Arc participants frequent the restaurants and shops. In the past Arc held our annual Festival of Trees event at the mall.
- The Cardinal Track Club and others – the Arc is chosen as one of the local non-profits to benefit from the awareness and the money raised from these 3 annual races, Annual "Turkey Gallop and Gorge," "Four on the Fourth," and Tour de Carrboro in October.
- The Meadowmont Homeowners Association annual yard sale donating all proceeds to the Arc, welcoming to Arc individuals residing in townhomes built and designated for persons with intellectual and developmental disabilities (9 individuals total.)
- PNC Bank – each Wednesday Petals with a Purpose gather in PNC conference room for Petals program at no charge to the Arc. PNC allows Arc administrative staff to park for free in their parking lot.
- Hargraves Community Center – Tuesdays Hargraves hosts Arc health and wellness cooking class (no charge to the Arc.)
- Mardi Gras Bowling – Fridays Arc individuals enjoy bowling alongside people with and without disabilities.
- Amante Pizza – Fridays Arc individuals enjoy lunching at Amante's alongside people with and without disabilities.
- The Root Cellar – encourages their staff to volunteer at the Arc, flower bouquets are donated each week to the Root Cellar so patrons can take home and enjoy a flower vase. Root Cellar features spot on website, they also sell EV candles, Arc Barks doggie treats.
- HOPE Gardens (Homeless Outreach Poverty Eradication)- Arc's cooking class plants 2 garden beds using food grown at garden for cooking class, flowers grown used in Petals class as well as teaching skills to Arc individuals learning how to grow organic food, how to eat healthier and enjoy the outdoors.
- UNC School of Journalism APPLES intern students – Five Public Relations and Journalism students intern 30 hours a week each semester creating videos, website, blogs, marketing materials for the Arc, intern in social programs helping to lead Arc's Spin, HOOPs basketball, cooking classes.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

The Arc of the Triangle strives to serve all people in our community that need our services. Currently our organization serves a large African-American population, multiple Indian families, and, to a smaller extent, Chinese/Japanese families. We have incorporated in our current staffing people that speak Spanish, Chinese and Japanese. In the past, the Executive Director assisted El Centro Latino in becoming informed about funding opportunities and participated on the non-profit's board. To further ensure that The Arc's outreach efforts are well-received, our intake process allows families the most comfortable and natural environment – their home (unless otherwise requested). This way, we are better able to get a cultural understanding of their needs. The Arc of the Triangle has included in its strategic plan strategies to increasingly meet the needs of ethnic and minority populations. All of our supervisors have attended a five week training multi-cultural sensitivity training and all of our direct care staff receives training.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education				x
Health and Nutrition				x
Job Training				x
Sports and Arts Activities				x
Pre-School Activities				
After-School Activities				x
Mentoring				x
Transportation				x
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
50% of persons served with intellectual and developmental disabilities will participate in inclusive community activities.	Using a combination of paid Direct Support Professionals and volunteers, participants engage in non-segregated community activities.	Out of 184 people served 60% did increase their participation in community activities. Activities included but were not limited to: educational opportunities, volunteer and paid work, advocacy activities, religious activities and social functions.	Person centered plans, service notes and annual surveys provided data to verify this information.
50% of persons served with intellectual and developmental disabilities will access community spaces.	With appropriate supports and transportation, participants are involved in activities in community spaces or in programs that include persons that do not have disabilities.	70% of program participants increased their usage of community spaces. In the case of respite for children, some services are required to take place in the home. Otherwise the number would have been greater.	Person centered plans, service notes and annual surveys provided data to verify this information.
50% of persons served with intellectual and developmental disabilities will increase the number of relationships and people in their circle of support.	Each participants person centered plan will include goals for increasing the number of people that they have relationships with and staff and volunteers will promote and ensure relationship building activities.	50% of program participants increased the number of relationships.	Person centered plans, service notes and annual surveys provided data to verify this information.
20 people served with intellectual and developmental disabilities will learn about and participate in leading	Participants will have opportunities to engage in exercise and nutrition classes.	20 people increased physical health by participating in cooking and nutrition classes. 100% of participants met their goal.	Person centered plans, service notes and annual surveys provided data to verify this information.

healthy lifestyles.			
18 people served with intellectual and developmental disabilities will participate in activities that give back to the community at large.	People with intellectual and developmental disabilities will be involved in “Petals with a Purpose” and “Hope Gardens” both community programs where individuals participate in civic minded activities.	18 people participated with volunteers on a weekly basis and 100% of participants met their goal.	Person centered plans, service notes and annual surveys provided data to verify this information.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
50% of persons served with intellectual and developmental disabilities will participate in inclusive community activities.	Using a combination of paid Direct Support Professionals and volunteers, participants engage in non-segregated community activities.	Out of 193 people served, 50% will increase their participation in community activities. Activities included but were not limited to: educational opportunities, volunteer and paid work, advocacy activities, religious activities and social functions.	Person centered plans, service notes and annual surveys will provide data to verify this information.
50% of persons served with intellectual and developmental disabilities will access community spaces.	With appropriate supports and transportation, participants are involved in activities in community spaces or in programs that include persons that do not have disabilities.	50% of program participants will increase their usage of community spaces. In the case of respite for children, some services are required to take place in the home. Otherwise the number would have been greater.	Person centered plans, service notes and annual surveys will provide data to verify this information.
50% of persons served with intellectual and developmental disabilities will increase the number of relationships and people in their circle of support.	Each participants person centered plan will include goals for increasing the number of people that they have relationships with and staff and volunteers will promote and ensure relationship building activities.	50% of program participants will increase the number of relationships. This includes all adults served.	Person centered plans, service notes and annual surveys will provide data to verify this information.
20 people served with intellectual and developmental disabilities will learn about and participate in leading healthy lifestyles.	Participants will have opportunities to engage in exercise and nutrition classes.	20 people will increase physical health by participating in cooking and nutrition classes.	Person centered plans, service notes and annual surveys will provide data to verify this information.
25 people served with intellectual and developmental disabilities will participate in activities that give back to the	People with intellectual and developmental disabilities will be involved in “Petals with a Purpose” and “Hope Gardens” community programs where individuals participate in civic minded activities.	25 people will participate with volunteers on a weekly basis.	Person centered plans, service notes and annual surveys will provide data to verify this information.

community at large.			

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **The Arc of the Triangle, Inc. (Formerly known as The Arc of Orange County, Inc.)**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 1,000	$ 1,000	$ 1,000	0%
Program Generated Revenue (fees)	$ 7,000	$ 8,000	$ 8,000	0%
Local Government Grants:				
Orange County	$ 4,000	$ 6,000	$ 6,000	0%
Town of Chapel Hill	$ 6,000	$ 12,000	$ 12,000	0%
Town of Carrboro	$ 3,000	$ 5,000	$ 5,000	0%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government	$ 35,000	$ 35,000	$ 35,000	0%
Federal Government				0
Other Grants: Cardinal Track Club	$ 6,500	$ 6,500	$ 6,500	0%
Other Grants: ZTA Sorority	$ 12,000	$ 12,000	$ 12,000	0%
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 74,500**	**$ 85,500**	**$ 85,500**	**0%**
PROGRAM EXPENSES				
Compensation	$ 56,065	$ 57,746	$ 59,478	3%
Rent & Utilities	$ 2,472	$ 2,546	$ 2,622	3%
Supplies & Equipment	$ 2,200	$ 2,500	$ 2,700	8%
Travel & Training	$ 1,200	$ 1,300	$ 1,500	15%
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Program Expenses	**$ 61,937**	**$ 64,092**	**$ 66,300**	**3%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 12,563**	**$ 21,408**	**$ 19,200**	**-10%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) **Define one unit of service**[+]: one unit of service is one quarter hour of time that a volunteer spent working on inclusive activities with an individual with an intellectual or developmental disability.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	70,000	70,000	$61,937.00	.88 $3.52 per hour
Estimated FY14-15	73,000	73,000	$63,937.00	.87 $3.50 per hour
Projected FY15-16	78,000	78,000	$65,000.00	.83 $3.33 per hour

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**	transgender 1	transgender 1	transgender 1	4. **Geographic Location(s)**			
Male	123	153	153	Durham City			
Female	69	85	85	Durham County	7	14	14
2. **Ethnicity**				Raleigh City			
African-American	24	34	34	Wake County	29	35	35
Caucasian	133	158	158	Town of Chapel Hill	85	100	100
Hispanic	5	9	9	Town of Carrboro	17	26	26
Other	31	38	38	Orange County	46	55	55
3. **Age**				Other (specify) Chatham/Pittsboro	7/2	7/2	7/2
0-5 Years	1	1	1				
6-18 Years	47	57	57	Per cent of clients at, or below, federal poverty level	45%	45%	45%
19-50 Years	135	171	171				
51+ Years	10	10	10				
Unknown				***TOTAL # OF CLIENTS SERVED***	193	239	239

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **The Arc of the Triangle, NC.**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 90,000	$ 90,000	$ 95,000	6%
Agency Generated Revenue (fees)	$ 2,542,000	$ 2,577,542	$ 2,700,000	5%
Local Government Grants:				
Orange County	$ 3,000	$ 3,000	$ 5,000	67%
Town of Chapel Hill	$ 7,000	$ 6,500	$ 8,500	31%
Town of Carrboro	$ 3,000	$ 4,000	$ 6,000	50%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 14,000	$ 12,000	$ 12,000	0%
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 2,659,000**	**$ 2,693,042**	**$ 2,826,500**	**5%**
AGENCY EXPENSES				
Compensation	$ 2,260,140	$ 2,306,767	$ 2,400,000	4%
Rent & Utilities	$ 36,000	$ 60,000	$ 76,000	27%
Supplies & Equipment	$ 72,000	$ 75,000	$ 76,700	2%
Travel & Training	$ 172,000	$ 170,000	$ 187,000	10%
Other Expenses:	$ 67,000	$ 65,000	$ 65,000	0%
Please list 3 largest "Other Expenses":				
T, Accreditation, hr consultatior $ 40,000.00				
recruitment activities $ 25,000.00				
$ -				
Total Agency Expenses	**$ 2,607,140**	**$ 2,676,767**	**$ 2,804,700**	**5%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 51,860**	**$ 16,275**	**$ 21,800**	**34%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	X1		$96,659.00	$99,558.00	$102,544.00		H
Volunteer Services Director	X1		$46,721.00	$48,122.00	$49,565.00		H
Business Manager	X1		$53,522.00	$55,067.66	$56,719.00		H
Human Resources Director	X1		$49,440.00	$50,923.00	$52,450.00		H
Support Supervisors	X4		$174,870.76	$180,116.00	$185,519.00		H
Admin	X2		$57,680.00	$59,410.00	$61,192.00		H
Employment Specialists	X2		$78,280.00	$80,628.00	$83,046.00		H
Direct Support Professionals	X210		$1,200,000.00	$1,200,000.00	$1,200,000.00		12H
Volunteers **(Hours 6240)**	X3.2						

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **The ArtsCenter**

Street Address: 300-G East Main St., Carrboro, NC 27510

Mailing Address: Same

Website Address: www.artscenterlive.org

Executive Director: Noel James (Interim Executive Director)

Telephone: 919-929-2787 x 217 E-Mail: director@artscenterlive.org

Contact Person: Julie Tomkovick

Telephone: 919-929-2787 x 213 E-Mail: development@artscenterlive.org

Fax: 919-969-8574 Federal ID Number: 51-0198497

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$7,000	$10,000
Summary: The ArtsCenter seeks $10,000 from Orange County Government to continue support of our **education programs.** These programs include scholarships for underserved children to participate in School Shows both at The ArtsCenter and in the school with arts residencies at Orange County Schools (including all 4 Title 1 Schools). These programs are based on the NC curricula standards for Pre K- High School audiences. We have provided arts education programs for 40 years. We reach almost every child in Orange Co., and have a $3.5 million economic impact in our county based on the Americans for the Arts formula.		
Town of Chapel Hill	$10,000	$15,000
Summary: The ArtsCenter seeks $15,000 from the Town of Chapel Hill in **general support** of: educational and arts activities that reach 93,000 per year (39% living in Chapel Hill); and for youth programs including 80+ School Shows fitting Pre K- 12th grade curriculum.		
Town of Carrboro	$15,000	$15,000
Summary: The ArtsCenter seeks $15,000 from the Town of Carrboro in **general support** of: educational and arts activities that reach 93,000 per year, both serving folks in & drawing folks to Carrboro; and youth programs that reach nearly 30,000 kids per year.		

Interim Executive Director

Board Chair

Date

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:

      1975

   b. Years in Operation:

      41

   c. Mission or Vision Statement (if applicable):

      The ArtsCenter exists in order to educate and inspire creativity and to enrich the lives of people of all ages.

   d. Brief History of Agency: The ArtsCenter is a non-profit, tax-exempt organization. Our primary focus is education, performance and exhibits. The ArtsCenter began as a single painting class in 1974 and has evolved over the past 41 years into a multi-faceted educational organization, using the arts to serve more than 93,000 people a year. Our core services are The ArtSchool (serving 15 year olds through retirees) and our youth programs (serving pre-K through 15 year olds though Afterschool Arts Immersion, Arts-In Education, ArtsCamp, School Shows, and Youth Art Blocks). Additionally we serve audiences via theater performances, live concerts, and gallery exhibits. Many of these activities are organized and implemented together with other community organizations, area businesses, area schools, and local governmental agencies and departments. In a typical year, 25-35% of our constituents are children under 18.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

   A) General Support
   - Need for affordable educational, creative, and cultural experiences that reflect the diversity of our local community
   - Need for local underserved communities to be engaged through flexible pricing, scholarships, and dedicated outreach activities and methods
   - Need to nurture and grow our local creative and innovative economy and communities
   - To provide leadership and focus to our creative community

B) Youth Programs

- The need for affordable arts experiences for children, including a wide range of arts classes and workshops, residencies, performances, and afterschool care
- The need to reinforce the NC curriculum for students with varied learning styles through the use of the visual and performing arts
- The need for afterschool programs that provide safe environment for learning, homework assistance, healthy nutrition, and reliable transportation from local schools
- The need to support teachers' capability to use the arts to reach students with varied learning styles

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

For both A) General Support & B) Youth Programs

The ArtsCenter celebrated its 40th anniversary in 2014. We have begun an ArtsCenter "Next 40" campaign for operational funds which will last throughout the year.

Our Art in Education program's residencies were so successful in reaching underserved students and measurably improving curriculum understanding through our 5 year pilot project with Title I Focus School – Central Elementary in Hillsborough- that two other Title I elementary schools (New Hope and Efland-Cheeks) and Partnership Academy within Orange County Schools were added to this residency program last year; the expanded AIE program continues throughout FY2015-16. The AIE program uses the visual and performing arts to reinforce NC core curricula and provides teachers with additional skills to reach youth with differing learning styles and needs.

In awareness of our need to increase services to local underserved communities, last year we created a new position, Youth Programs Assistant, to help identify communities of need and implement strategies for greater involvement with these communities; this position was continued this year and will be in place in FY2015-16. We began an onsite Afterschool Arts Immersion program at the new Northside Elementary that will continue through 2015-16.

We are exploring with the Town of Carrboro a partnership to create a new Arts and Innovation Center building that would include The ArtsCenter in a shared facility together with Kidzu, and could potentially provide extra studio space, a community radio station, community rehearsal and meeting space, and other key collaborative uses.

The ArtsCenter Stage won a *Special Achievement in the Humanities* award from the INDY Weekly for our recent Civil War retrospective, including *Walt, The Whipping Man*, and *A Civil War Christmas*. With 3 year funding from an anonymous donor, we have begun a New Play Series entitled Redbird to encourage the development of new work by area playwrights; the first season's production will be in March 2015.

Our ArtSchool remains a core educational program here. Our summer ArtsCamps are frequently filled to capacity. Our AfterSchool Arts Immersion program is at capacity on most days, and our theater audience is growing. Our concerts program has been

redesigned to feature more local and regional artists, in addition to nationally touring groups.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

A) General Support
The ArtsCenter earns 70-75% of its annual revenue through ticket sales, class tuitions, business sponsorships, rentals, concessions, and merchandising. The remainder comes through foundation grants, corporate grants, local and state government support, and donations from individual community members and area businesses.

Recent corporate and community foundation funders include: AICPA, Blue Cross Blue Shield of NC, Bellin Family Trust, Caktus Consulting Group, Chapel Hill Tire Company Car Care Center, Chapel Hill Restaurant Group, The Community Fdtn of Western NC, The Dalldorf Fund, Dorrie Casey and Archie Purcell Fund of Triangle Community Fdtn, Duke Energy Fdtn, Fenwick Fdtn, Friends of World Music, FurnitureLab, GSK Comm. Fdtn, Grable Fdtn, Mary Duke Biddle Fdtn,, Oak Fdtn., The Nicholson Fdtn, Paul Green Foundation Endowment Fund of Triangle Community Fdtn, Perry Colwell Fund of Triangle Community Fdtn, PNC Bank, Power2Give, Shared Visions Fdtn, SouthArts, Stanley Martin Homes, State Employees Combined Fund, Strowd Roses, T. S. Kenan Fdtn, the Vanguard Charitable Endowment, We Shall Overcome Fund, Wells Fargo Fdtn, William R. Kenan, Jr Charitable Trust, and many Chapel Hill-Carrboro restaurants and small businesses.

Recent governmental funders include those in this request- Orange County, The Town of Chapel Hill, and the Town of Carrboro, plus the North Carolina Arts Council, the Orange County Arts Commission, and the Carrboro Tourism Development Authority,.

The ArtsCenter membership ranges from 620-700 individuals in the course of the year. We also have support from more than 50 area businesses not named above, plus 108 non-member donors as well.

B) Youth Programs
The Youth programs including School Shows, Arts in Education, Youth Art Classes, Afterschool Arts Immersion, and SuperFun shows earn approximately 50% of their annual budget through ticket sales and tuitions. Because of the high need for scholarship tickets and scholarship tuitions by area schools and school children, The ArtsCenter has created strong relationships with local government agencies, foundations, and corporations.

Recent corporate and community foundation funders for varied youth programs include: Chapel Hill Tire Car Care Centers, GSK Comm. Fdtn, Grable Fdtn, The Nicholson Fdtn, SouthArts, StrowdRoses Fdtn, We Shall Overcome Fund, and Wells Fargo Fdtn. Recent governmental funders include those in this request plus: the Orange County Arts Commission and the North Carolina Arts Council.

We are exploring successful models of peer arts groups for improved long-term sustainability of scholarships for our youth programs.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

A) General Support & Youth Programs

- We are exploring with the Town of Carrboro a partnership to create a new Arts and Innovation Center building that would include The ArtsCenter in a shared facility together with Kidzu, and could potentially provide extra studio space, a community radio station, community rehearsal and meeting space, and other key collaborative uses.
- We are partnering with Common Ground Theatre in Durham to present a timely issue-oriented theater project. Common Ground will present *HANDS UP: 6 Playwrights, 6 Testaments*: a collection of monologues by African-American playwrights featuring a wide range of perspectives on being a black man in America in the 21st century. The ArtsCenter will work with audience feedback from these performances to craft a thoughtful dramatized version of our communities' responses.
- The ArtSchool has conducted classes recently at the Century Center with Carrboro Recreation and Parks Department and at individual artists' studios.
- Our AfterSchool Arts Immersion program offers afterschool classes at the new Northside Elementary.
- ArtsCenter programs have been designed in collaboration with the Orange County and Chapel Hill/Carrboro City Schools, the Ackland Art Museum, UNC's Center for the American South, UNC's Pauper Players, UNC-CH Center for Global Initiatives, UNC/CH/Orange County Partnership for Children, and WCOM.
- The ArtsCenter often provides scholarships and free performance tickets to the ARC of Orange County, Chapel Hill/Carrboro City Schools, Head Start, the various Recreation Departments of Carrboro, Chapel Hill and Orange County, Hargraves Center, Orange County Schools, the Sonja Haynes Stone Center for Black Culture and History, Trosa, and Youth Creating Change.
- Volunteer and community service opportunities are provided to the Community Work Program, to area public, charter and private school service learning programs, to the UNC APPLES Program, and to the general public. A number of UNC students volunteer on their own to work in various capacities at The ArtsCenter as administrative, development, and marketing interns. A list of volunteer opportunities is available for anyone interested in helping at The ArtsCenter.
- The ArtsCenter provides performance booking services to Chapel Hill/Carrboro City Schools, the PTA Cultural Enrichment Committees, Hargraves Center, Orange County schools Cultural Arts Programs, and the Orange County Library.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

A) General Support

The Afterschool Arts Immersion Program recruits a majority of teaching artists who are culturally diverse. The ArtsCenter collaborates with Hargraves and the Orange County Partnership for Young Children. Hidden Voices, part of The ArtsCenter's resident theater

program, serves under-represented communities through productions about, for, and by those communities.

The ArtsCenter department heads maintain strong programmatic cultural diversity, especially in all youth programs. The Board of Directors maintains its gender diversity. The ArtsCenter continues its Radio Theater series for the visually impaired in conjunction with Triangle Radio Reading Service.

The ArtsCenter advertises its programs throughout all segments of the community, serving a wide range of ethnic and minority groups. The ArtsCenter markets to the Latino community through select translated marketing material: our press release media list targets African-American and Latino focused publications and radio stations, in addition to reaching traditional mainstream media outlets.

B) Youth Program

The After School Arts Immersion Program recruits a majority of teaching artists who are culturally diverse. Central Elementary, New Hope Elementary, Efland-Cheeks Elementary, and Partnership Academy (our Arts-In-Education focus schools) are all Title I schools with a strong minority student population served in their entirety by our Arts in Education program. AIE's expansion was due to additional support from Orange County Outside Agency funding and support from the Orange County School system.

The ArtsCenter collaborates with all Chapel Hill/Carrboro and Orange County Schools in the design and implementation of its youth programs, Hargraves and the Orange County Partnership for Young Children.

In awareness of our need to increase services to local underserved communities, last year we created a new position, Youth Programs Assistant, to help identify communities of need and implement strategies for greater involvement with these communities; this position was continued this year and will be in place in FY2015-16.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X	X	X
Health and Nutrition				
Job Training				
Sports and **Arts** Activities	X	X	X	X
Pre-School Activities				
After-School Activities	X			
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

A-1 GENERAL SUPPORT

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Offer at least 500 arts classes by 75 arts instructors for youth & adult students in visual, performing, writing, & other arts.	ArtSchool Director works with area teaching artists & traveling master artists to create class semesters and special workshops.	Offered 483 classes by 91 artists. (Did not meet original classes offered goal by 17 classes; Exceeded number of instructors goal.**See note below.)*	Verified through printed publicity materials, website, & artists' contracts.
Offer Afterschool Arts Immersion programs for up to 40 full-time AAI students, plus a la carte youth classes for 200+ students taking 1-2 classes.	Youth Arts Coordinator works with teaching artists, schools, home school assns, students, & parents to create: AAI, (combining arts education with homework assistance, plus transport from 5 schools & a healthy snack); & Youth Art Classes filling arts education needs.	Provided AAI for 36-40 students (total daily count varied), plus Youth classes that reach 200+ additional students. (Met goal.)	Verified with youth class catalogue, afterschool printed materials, workshop flyers, website, & attendance records
Coordinate Arts-In-Education for 1400 Orange Co. students, with a focus on Orange Co Title 1 schools.	School & Family Performances Coordinator works with Orange Co School administrators, teachers, & teaching artists, especially Title 1 schools, to create school residences that supplement NC curricula & match school shows to those classes as appropriate	Held 20 curriculum-integrated residencies, reaching students, including 1400+ Title 1 students. (Exceeded goal.)	Verified with Orange County Schools' letter of understanding, classroom attendance records, & artists' contracts.
Present at least 70 school shows here or in area schools that supplement NC curriculum for K-12 students.	School & Family Performances Coordinator works with local & touring performing artists, local schools, area PTAs & teachers to create School Show Series that fits NC curricula & school calendars.	Presented 11 shows here & 87 shows in area schools reaching K-12, as age appropriate. (Exceeded goal.)	Verified through flyers designed for teachers, website, & performers' contracts.

Offer 10 weeks of Summer Camp programs, plus mini-camps during teacher workdays occurring within the school year.	Youth Arts Coordinator works with teaching artists, youth counselors, students, & parents to create age appropriate camps covering diverse cultural tradition & arts disciplines.	Offered 11 weeks of summer camps & youth programs providing 1,399 K-12 arts experiences. (Met goal- Summer camp runs 10-12 weeks, depending on school calendars.).	Verified with ArtsCamp catalogue, website, and registrations from camps and youth classes.
Present at least 4 internally produced theater shows; present 16 shows with local theater companies.	Director of ArtsCenter Stage will: work with area directors, actors, & design staff to create the theater season; produce at least 1 new play; maintain strong working relationships with both resident & local theater companies.	Produced 4 ArtsCenter Stage shows, including new work; presented 69 shows with 18 collaborating local theater groups. (Met goal.)	Verified through printed publicity materials, website, published ads, & artists or theater companies' contracts.
Exhibit 12 visual arts shows highlighting the works of at least 25 different area artists.	Gallery Coordinator will: work with NC visual artists and groups to evaluate work and set gallery calendar; run juried shows as needed.	Presented 12 monthly individual or group visual arts shows featuring more than 100 artists in the Nicholson gallery. (Exceeded goal.)	Verified through printed publicity materials, website, & artists' sample slides.
Facilitate community use of our theatre space for concert production.	Operations Director will work with presenting organizations, presenter consortiums, & music agencies to create curated concert schedule and collaborative presentations.	Majority of our 87 concerts focused on local & regional touring artists, 10% were presented by outside organizations within the local community. (Met goal.)	Verified through printed publicity materials, website, published ads & performers' contracts.
Maintain status as Orange County's largest employer of area artists.	All program heads will seek out & work with emerging & known artists. Artists seek out employment opportunities here.	Employed 300+ artists or performing groups, directly or through co-presenting. (Met goal.)	Verified with artists/groups contracts, performance listings, camp & school catalogues
Maintain a high caliber of performers featured, artists exhibited, and instructors.	Programmers will seek out quality professional touring and local artists.	Coordinated programs with professional teaching artists consistently rated highly in evaluations by student & schools. Presented award-winning youth & adult performers. (Met goal.)	Verified with INDY Weekly & N&O positive critical reviews and school surveys. Many award winning artists were presented.

If program(s) did not meet its stated goal(s), please explain:

* After length analysis of classes offered versus classes held with full enrollment, the ArtSchool Director focused on offering slightly few classes (thereby decreasing the number of classes canceled with insufficient enrollment), while increasing the variety of classes as noted in the increase in number of instructors involved in FY2013-14. This strategy led to a larger number of full classes and a slight increase in the number of students served.

A-2 Youth Programs

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
Offer Afterschool Arts Immersion programs for up to 40 full-time AAI students, plus a la carte youth classes for 200+ students taking 1-2 classes.	Youth Arts Coordinator works with teaching artists, schools, home school assns, students, & parents to create: AAI, (combining arts education with homework assistance, plus transport from 5 schools & a healthy snack); & Youth Art Classes filling arts education needs.	Provided AAI for 36-40 students (total daily count varied), plus Youth classes that reach 200+ additional students. (Met goal.)	Verified with youth class catalogue, afterschool printed materials, workshop flyers, website, & attendance records
Coordinate Arts-In-Education for 1400 Orange Co. students, with a focus on Orange Co Title 1 schools.	School & Family Performances Coordinator works with Orange Co School administrators, teachers, & teaching artists, especially Title 1 schools, to create school residences that supplement NC curricula & match school shows to those classes as appropriate	Held 20 curriculum-integrated residencies, reaching students, including 1400+ Title 1 students. (Exceeded goal.)	Verified with Orange County Schools' letter of understanding, classroom attendance records, & artists' contracts.
Present at least 70 school shows here or in area schools that supplement NC curriculum for K-12 students.	School & Family Performances Coordinator works with local & touring performing artists, local schools, area PTAs & teachers to create School Show Series that fits NC curricula & school calendars.	Presented 11 shows here & 87 shows in area schools reaching K-12, as age appropriate. (Exceeded goal.)	Verified through flyers designed for teachers, website, & performers' contracts.

B. FY 2014-15 Programs and Anticipated Outcomes

B-1 GENERAL SUPPORT

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Offer at least 450 arts classes by 75 arts instructors for youth & adult students in visual, performing, writing, & other arts.	ArtSchool Director will work with area teaching artists & traveling master artists to create class semesters and special workshops.	Offer 450 classes by 75 artists.	Verify through printed publicity materials, website, & artists' contracts.
Offer Afterschool Arts Immersion programs for up to 40 full-time AAI students, plus a la carte youth classes for 200+ students taking 1-2 classes.	Youth Arts Coordinator will work with teaching artists, schools, home school assns, students, & parents to create: AAI, (combining arts education with homework assistance, plus transport from 5 schools & healthy snack) & Youth Art Classes filling arts education needs.	Provide AAI for up to 40 students, plus Youth classes that reach 200+ additional students.	Verify with youth class catalogue, afterschool printed materials, workshop flyers, website, & attendance records.
Coordinate Arts-In-Education for 1400 Orange Co. students, with a focus on Orange Co Title 1 schools.	School & Family Performances Coordinator will work with Orange Co School administrators, teachers, and teaching artists, especially Title 1 schools to create in school residences that supplement NC curricula & coordinate attendance by those classes at school shows.	Hold 10 curriculum-integrated residencies, reaching students, including 1400 Title 1 students from Central Elementary, New Hope Elementary, Efland-Cheeks Elementary, and Partnership Academy	Verify with Orange County Schools' letter of understanding, classroom attendance records, & artists' contracts.
Present at least 70 school shows here or in area schools that supplement NC curriculum for K-12 students.	School & Family Performances Coordinator will work with local & touring performing artists, schools, PTAs & teachers to create School Show Series that advances NC curricula & fits school calendars.	Present 70 shows here or in area schools reaching K-12, as age appropriate.	Verify through flyers designed for teachers, website, & performers' contracts.
Offer 10 weeks of Summer Camp programs, plus mini-camps during teacher workdays occurring within the school year.	Summer Camp Director works with teaching artists, youth counselors, students, & parents to create age appropriate camps covering diverse cultural tradition & arts disciplines.	Offer 10 weeks of summer camps & youth programs providing 1200 K-12 arts experiences. *Summer camp runs 10-12 weeks, depending on school calendars.*	Verify with ArtsCamp catalogue, website, and registrations from camps and youth classes.
Produce at least 4 theater shows; present shows with 16 outside groups and local theater companies.	Director of ArtsCenter Stage: creates season with area actors, directors, & designers; produces 1 new play; & maintains strong contacts area theater groups.	Produce 4 ArtsCenter Stage shows, including one new work; present 16 shows with collaborating local theater groups.	Verify through printed publicity materials, website, published ads, & artists or theater companies' contracts.

Exhibit 12 visual arts shows highlighting the works of at least 75 different area artists.	Gallery Coordinator will: work with NC visual artists and groups to evaluate work and set gallery calendar; run juried shows as needed.	Present 12 monthly individual or group visual arts shows in the Nicholson gallery.	Verify through printed publicity materials, website, & artists' sample slides.
Facilitate community use of our performance spaces for concert production.	Operations Director will work with presenting organizations, presenter consortiums, music agencies, and community groups to create curated concert schedule and collaborative presentations.	Present 50 concert presented by The ArtsCenter or with other community partners.	Verify through printed publicity materials, website, published ads & performers' contracts.
Maintain status as Orange County's largest employer of area artists.	All program heads will seek out & work with emerging & known artists. Artists seek out employment opportunities here.	Employ 300+ artists or performing groups, directly or through co-presenting.	Verify with artists/groups contracts, performance listings, camp & school catalogues
Maintain a high caliber of performers featured, artists exhibited, and instructors.	Programmers will seek out quality professional touring and local artists.	Coordinate programs with professional teaching artists consistently rated highly in student & school evaluations. Present award-winning youth & adult performers.	Verify with INDY Weekly & N&O positive critical reviews, as well as audience and school surveys. Many award winning artists will be presented.

FY 2014-15 Programs and Anticipated Outcomes

B-2 Youth Programs

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Offer Afterschool Arts Immersion programs for up to 40 full-time AAI students, plus a la carte youth classes for 200+ students taking 1-2 classes.	Youth Arts Coordinator will work with teaching artists, schools, home school assns, students, & parents to create: AAI, (combining arts education with homework assistance, plus transport from 5 schools & healthy snack) & Youth Art Classes filling arts education needs.	Provide AAI for up to 40 students, plus Youth classes that reach 200+ additional students.	Verify with youth class catalogue, afterschool printed materials, workshop flyers, website, & attendance records.
Coordinate Arts-In-Education for 1400 Orange Co. students, with a focus on Orange Co Title 1 schools.	School & Family Performances Coordinator will work with Orange Co School administrators, teachers, and teaching artists, especially Title 1 schools to create in school residences that supplement NC curricula & coordinate attendance by those classes at school shows.	Hold 10 curriculum-integrated residencies, reaching students, including 1400 Title 1 students from Central Elementary, New Hope Elementary, Efland-Cheeks Elementary, and Partnership Academy.	Verify with Orange County Schools' letter of understanding, classroom attendance records, & artists' contracts.
Present at least 70 school shows here or in area schools that supplement NC curriculum for K-12 students.	School & Family Performances Coordinator will work with local & touring performing artists, local schools, area PTAs & teachers to create School Show Series supplements NC curricula & fits school calendars.	Present 70 shows here or in area schools reaching K-12, as age appropriate.	Verify through flyers designed for teachers, website, & performers' contracts.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **The ArtsCenter- General Support**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 146,603	$ 157,915	$ 160,915	2%
Program Generated Revenue (fees)	$ 950,668	$ 924,500	$ 924,500	0%
Local Government Grants:				
Orange County	$ 6,000	$ 7,000	$ 10,000	43%
Town of Chapel Hill	$ 10,000	$ 10,000	$ 10,000	0%
Town of Carrboro- Out Agency+CTDA	$ 17,485	$ 15,000	$ 15,000	0%
Other Local: OCAC	$ 7,500	$ 10,500	$ 10,500	0%
Other Local: NCAC	$ 47,005	$ 47,028	$ 47,000	0%
Other Local: Other Orange Co funding	$ 5,750			0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Foundations	$ 210,301	$ 261,750	$ 261,750	0%
Other Grants: Corporate	$ 37,930	$ 35,000	$ 35,000	0%
Miscellaneous/Other Revenue	$ 127,680	$ 120,000	$ 120,000	0%
Please list 3 largest Miscellanous sources:				
Rental $ 52,572.00				
Concessions $ 48,439.00				
In Kind $ 25,005.00				
Total Program Revenue	**$ 1,566,922**	**$ 1,588,693**	**$ 1,594,665**	**0%**
PROGRAM EXPENSES				
Compensation	$ 1,081,216	$ 1,001,100	$ 1,001,100	0%
Rent & Utilities	$ 147,393	$ 147,393	$ 147,393	0%
Supplies & Equipment	$ 63,272	$ 50,000	$ 50,000	0%
Travel & Training	$ 2,023	$ 1,499	$ 1,499	0%
Other Expenses:	$ 329,309	$ 300,000	$ 300,000	0%
Please list 3 largest "Other Expenses":				
Depreciation $ 35,309.00				
Marketing $ 50,538.00				
Professional Fees $ 56,290.00				
Total Program Expenses	**$ 1,623,213**	**$ 1,499,992**	**$ 1,499,992**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (56,291)**	**$ 88,701**	**$ 94,673**	**7%**

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **The ArtsCenter- Youth Programs**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 5,498	$ 5,498	$ 5,498	0%
Program Generated Revenue (fees)	$ 426,573	$ 426,573	$ 426,573	0%
Local Government Grants:				
Orange County	$ 6,000	$ 6,000	$ 6,000	0%
Town of Chapel Hill				0
Town of Carrboro-				0
Other Local: OCAC	$ 7,500	$ 7,500	$ 7,500	0%
Other Local: NCAC				0
Other Local: Other Orange Co funding	$ 5,750	$ 5,750	$ 5,750	0%
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Foundations	$ 153,429	$ 153,429	$ 153,429	0%
Other Grants: Corporate	$ 3,000	$ 3,000	$ 3,000	0%
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
Total Program Revenue	**$ 607,750**	**$ 607,750**	**$ 607,750**	**0%**
PROGRAM EXPENSES				
Compensation	$ 439,220	$ 439,220	$ 439,220	0%
Rent & Utilities	$ 25,996	$ 25,996	$ 25,996	0%
Supplies & Equipment	$ 31,545	$ 31,545	$ 31,545	0%
Travel & Training	$ -	$ -	$ -	0
Other Expenses:	$ 54,691	$ 54,691	$ 54,691	0%
Please list 3 largest "Other Expenses":				
Depreciation $ 10,593.00				
Marketing $ 17,446.00				
Transportation $ 22,647.00				
Total Program Expenses	**$ 551,452**	**$ 551,452**	**$ 551,452**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 56,298**	**$ 56,298**	**$ 56,298**	**0%**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]:

A- GENERAL SUPPORT- An attendee of any program of The ArtsCenter

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	93,000	93,000	$1,601,137	$17.22
Estimated FY14-15	93,000	93,000	$1,499,992	$16.12
Projected FY15-16	93,050	93,050	$1,500,000	$16.12

B- YOUTH PROGRAMS- K-12 student or attendee of ArtsCenter youth programs

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	29,144	29,144	$551,452	$18.92
Estimated FY14-15	29,144	29,144	$551,452	$18.92
Projected FY15-16	29,144	29,144	$551,452	$18.92

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: GENERAL SUPPORT

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	***Client characteristics***	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	46,500	46,500	46,500	Durham City	13,020	13,020	13,020
Female	46,500	46,500	46,500	Durham County	3,720	3,720	3,720
2. **Ethnicity**				Raleigh City	11,160	11,160	11,160
African-American	13,950	13,950	13,950	Wake County	3720	3720	3720
Caucasian	61,380	61,380	61,380	Town of Chapel Hill	35,340	35,340	35,340
Hispanic	10,230	10,230	10,230	Town of Carrboro	14,880	14,880	14,880
Other	7,440	7,440	7,440	Orange County	4650	4650	4650
3. **Age**				Other (specify)	6,510	6,510	6,510
0-5 Years	1,436	1,436	1,436				
6-18 Years	27,284	27,284	27,284	Per cent of clients at, or below, federal poverty level	12%	12%	12%
19-50 Years	27,549	27,549	27,549				
51+ Years	36,731	36,731	36,731		93,000	93,000	93,000
Unknown				***TOTAL # OF CLIENTS SERVED***			

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Youth Programs

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	15,271	15,271	15,271	Durham City	3,084	3,084	3,084
Female	15,272	15,272	15,272	Durham County	500	500	500
2. **Ethnicity**				Raleigh City			
African-American	7,531	7,531	7,531	Wake County	302	302	302
Caucasian	15,613	15,613	15,613	Town of Chapel Hill	17,931	17,931	17,931
Hispanic	4,529	4,529	4,529	Town of Carrboro	3,930	3,930	3,930
Other	2,870	2,870	2,870	Orange County	2,523	2,523	2,523
3. **Age**				Other (specify)Alamance, Chatham, walk-up unknown	2273	2273	2273
0-5 Years	1,410	1,410	1,410				
6-18 Years	29,133	29,133	29,133	Per cent of clients at, or below, federal poverty level	20%	20%	20%
19-50 Years							
51+ Years							
Unknown				***TOTAL # OF CLIENTS SERVED***	30543	30543	30543

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **The ArtsCenter**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 146,603	$ 157,915	$ 160,915	2%
Agency Generated Revenue (fees)	$ 950,668	$ 924,500	$ 924,500	0%
Local Government Grants:				
Orange County	$ 6,000	$ 7,000	$ 10,000	43%
Town of Chapel Hill	$ 10,000	$ 10,000	$ 10,000	0%
Town of Carrboro- Out Agency+CTDA	$ 17,485	$ 15,000	$ 15,000	0%
Other Local: OCAC	$ 7,500	$ 10,500	$ 10,500	0%
Other Local: NCAC	$ 47,005	$ 47,028	$ 47,000	0%
Other Local: Other Orange Co funding	$ 5,750			0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Foundations	$ 210,301	$ 261,750	$ 261,750	0%
Other Grants: Coroporates	$ 37,930	$ 35,000	$ 35,000	0%
Miscellaneous/Other Revenue	$ 127,680	$ 120,000	$ 120,000	0%
Please list 3 largest Miscellanous sources:				
Rental $ 52,572.00				
Concessions $ 48,439.00				
In Kind $ 25,005.00				
Total Agency Revenue	**$ 1,566,922**	**$ 1,588,693**	**$ 1,594,665**	**0%**
AGENCY EXPENSES				
Compensation	$ 1,081,216	$ 1,001,100	$ 1,001,100	0%
Rent & Utilities	$ 147,393	$ 147,393	$ 147,393	0%
Supplies & Equipment	$ 63,272	$ 50,000	$ 50,000	0%
Travel & Training	$ 2,023	$ 1,499	$ 1,499	0%
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Please list 3 largest "Other Expenses":				
Depreciation $ 35,309.00				
Marketing $ 50,538.00				
Professional Fees $ 56,290.00				
Total Agency Expenses	**$ 1,623,213**	**$ 1,499,992**	**$ 1,499,992**	**0%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ (56,291)**	**$ 88,701**	**$ 94,673**	**7%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: The ArtsCenter

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Accounts Director	1		43606	43606	43606	4.03	H
Youth Arts Coordinator	1		42207	42207	42207	4	H
ArtSchool Director	1		45194	45194	45194	4.18	H
ArtSchool Assistant	.25		3667	3667	3667	.34	
Afterschool & Camps Coordinator	1		39716	39716	39716	3.67	H
School & Family Performance Coordinator	1		41061	41061	41061	3.7	H
Youth Assistant	1		19798	19798	19798	1.83	H
Development Director	1		42488	42488	42488	4	H
Director of Operations	1		40929	40929	40929	3.7	H
Operations Assistant	.5		4293	4293	4293	.4	
Executive Director	1		65472	65472	65472	6	H
Marketing Director	1		31171	39716	39716	2.88	H
Theater Director	1		39563	39563	39563	3.06	H
House Managers	1		33137	33137	33137	3.6	H

Marketing Assistant	.25		4849	4849	4849	.44	
Bartenders	.25		4263	4263	4263	.33	
Youth Counselors	1.5		47996	47996	47996	4.44	
Instructors	15.5		515762	515762	515762	47.7	
Cleaning Staff	.5		16044	16044	16044	1.5	
Volunteer Hours	1.02						

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: The Exchange Club Center for the Prevention of Child Abuse of North Carolina, Inc's The Exchange Club's Family Center in Alamance

Street Address: 200 N. Main Street Graham, NC 27253

Mailing Address: same

Website Address: www.exchangescan.org

Executive Director: Cynthia Napoleon-Hanger

Telephone: 336-748-9028 E-Mail: cynthia.hanger@exchangescan.org

Contact Person: Sarah Black

Telephone: 336-227-5601 E-Mail: sarah.black@exchangescan.org

Fax: 336-227-5601 Federal ID Number: 58-1443692

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$ 2,000	$15,800
Summary of intended use of funds: The Parent Aide program will provide in-home visitation services to 6 families at-risk for and/or involved in child abuse and neglect in Orange County. Provision of services will be offered to all Orange County residents for free. The goals of the in-home Parent Aide services include (1) increased safety of the child (ren), (2) increased parenting skills, (3) increased problem-solving skills, and (4) increased social support. Parent Aide in-home services last from 6 to 18 months with an average of 13 months before the family reaches its goals. Service activities include parent education, coaching, role modeling/ playing, assistance with concrete supports, case management, advocacy, and assistance with transportation needs. Various evidenced-based curriculums are used to support service activities such as Triple P Positive Parenting Program, Strengthening Families, Nurturing Parenting Program, and 24/7 Dad. Parent Aide services decrease child abuse and neglect by decreasing risk factors in the home and increasing protective factors for families. Parent Aide services are evidenced-based and are currently listed on the California Evidence-Based Clearinghouse for Child Welfare's list as a Level 3 "Promising Research Evidence" status.		

Town of Chapel Hill	$ 4,000	$13,500
Summary of intended use of funds: The Parent Aide program will provide in-home visitation services to 6 families at-risk for and/or involved in child abuse and neglect. Provision of services will be offered to all Chapel Hill residents for free. The goals of the in-home Parent Aide services include (1) increased safety of the child (ren), (2) increased parenting skills, (3) increased problem-solving skills, and (4) increased social support. Parent Aide in-home services last from 6 to 18 months with an average of 13 months before the family reaches its goals. Service activities include parent education, coaching, role modeling/ playing, assistance with concrete supports, case management, advocacy, and assistance with transportation needs. Various evidenced-based curriculums are used to support service activities such as Triple P Positive Parenting Program, Strengthening Families, Nurturing Parenting Program, and 24/7 Dad. Parent Aide services decrease child abuse and neglect by decreasing risk factors in the home and increasing protective factors for families. Parent Aide services are evidenced-based and are currently listed on the California Evidence-Based Clearinghouse for Child Welfare's list as a Level 3 "Promising Research Evidence" status.		
Town of Carrboro	$0	$13,500
Summary of intended use of funds: The Parent Aide program will provide in-home visitation services to 6 families at-risk for and/or involved in child abuse and neglect. Provision of services will be offered to all Carrboro residents for free. The goals of the in-home Parent Aide services include (1) increased safety of the child (ren), (2) increased parenting skills, (3) increased problem-solving skills, and (4) increased social support. Parent Aide in-home services last from 6 to 18 months with an average of 13 months before the family reaches its goals. Service activities include parent education, coaching, role modeling/ playing, assistance with concrete supports, case management, advocacy, and assistance with transportation needs. Various evidenced-based curriculums are used to support service activities such as Triple P Positive Parenting Program, Strengthening Families, Nurturing Parenting Program, and 24/7 Dad. Parent Aide services decrease child abuse and neglect by decreasing risk factors in the home and increasing protective factors for families. Parent Aide services are evidenced-based and are currently listed on the California Evidence-Based Clearinghouse for Child Welfare's list as a Level 3 "Promising Research Evidence" status.		

_____ _____

Executive Director Board Chair

_____ _____

Date Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:

The Exchange Club Center for the Prevention of Child Abuse of North Carolina, Inc. was incorporated in 1981. The Exchange Club's Family Center in Alamance has been a part of the agency since 1997.

   b. Years in Operation:

The Exchange Club Center for the Prevention of Child Abuse of North Carolina, Inc. began operating in 1981. The Exchange Club's Family Center in Alamance has been in operation since 1997 and began services in Orange County in 2004 through its treatment programs.

   c. Mission or Vision Statement (if applicable):

The mission of the agency is the prevention and treatment of child abuse and neglect.

   d. Brief History of Agency:

The Exchange Club's Family Center in Alamance (Family Center) is a satellite office of Exchange Club Center for the Prevention Center of Child Abuse of North Carolina, Inc. known as Exchange/SCAN (Stop Child Abuse Now). Exchange/SCAN, located in Winston-Salem, has been in operation since 1981 and has developed and provided state and national leadership in home visiting services to families at risk or involved in abuse or neglect. The Family Center, located in Graham, has 5 prevention and treatment programs currently offered to families which include Intensive Family Preservation Services, Parent Aide, Children's Parents parenting classes, Adolescent Parenting Program, Parent & Teen Solutions, and Adolescent Parent Support Program as well as a 24-hour crisis line and community awareness. The Family Center has 18 years of experience in administering grant funds and providing successful child abuse prevention services in the community. Exchange/SCAN, home office, is governed by a Board of Directors, and The Family Center has an Advisory Board which works in conjunction with the Board of Directors of Exchange/SCAN.

The center currently offers programming in 7 counties (Alamance, Orange, Chatham, Person, Caswell, Guilford, and Randolph) in the triangle/triad area with Orange County (along with Alamance County) as one of the primary counties served. Initially the Family Center of Alamance opened in 1997 offering the prevention services of Children's Parents parenting classes and Parent Aide services and began to expand to additional programming in 1999. The agency expanded into Orange County in 2004 with its treatment service Intensive Family Preservation. Additional programming was added in 2007-2008 the Family Center of Hillsborough closed down and board members of the center asked the Exchange Club's Family Center in Alamance to take over provision of Parent Aide Program services in Orange County. Since that time Parent Aide Program services and Children's Parents parenting classes have been offered for at-risk populations of child abuse and neglect in Orange County through the Family Center. The staff of the agency is versed in the complexity of child abuse prevention and has decades of experience in in-home visitation and parenting education. The agency's County Director has a Master's degree with 9 years of executive level management and administration

experience, 12 years of programmatic administration and implementation, and 14 years of clinical and service delivery experience. The Executive Director of Exchange/SCAN has over 32 years of experience working with family support, nearly 25 of those with the agency.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

The target population of Parent Aide Program services is families in Orange County and Chapel Hill at risk of and/or families who are experiencing child abuse and neglect. These families include various socioeconomic backgrounds and will match the diversity of the County (77% white, 12.2% Black, 8.3% Hispanic/Latino, and 7.6% Asian per the 2013 US Census). Because there is no accurate means or precise formula to measure child maltreatment risk within a population, examining child abuse and neglect data is often the standard measurement of the cumulative toll of these risk factors on families. Specific to Orange County from July 2013 to June 2014 there were 979 reports of abuse/neglect in Orange County. In the same reporting year, there were 552 children investigated for abuse and neglect (58.8% Caucasian, 30.98% African American, 9.24% Other, and .91% American Indian/Alaskan (Duncan et. al, 2014). Of the 552 children reported for abuse/neglect, 46.01% of them were between the ages of 0-5. As of December 2014 there were 105 children in foster care in the county (Duncan et. al, 2014). It is estimated that these rates of reports are even higher than documented. A recent study published by the American Academy of Pediatrics found that child maltreatment rates in the communities studied were significantly higher than rates reported by social services (Theodore et al., 2005). In their study, which used telephone interviews to over 1400 residents of North and South Carolina, rates of child maltreatment were found to be 40% higher than area social services reported for the same area. Researcher also found that rates of sexual abuse were 15% higher than actual reports to social services in that same study (2005). This child maltreatment data and the nature of under reporting within communities speak to the need for population targeted intervention services in the County to address the issue of child abuse and neglect in Orange County. The program will directly address these statistics by providing interventions to help families avoid the child welfare system. In addition, Parent Aide services are instrumental in addressing child abuse and neglect risk factors and replacing them with protective factors that increase parental resiliency, increase knowledge of parenting & child development, increase the social and emotional competence of children, and increase the concrete support and social connections of the family.

Child maltreatment data is not the only method to measure risk factors present in Orange County to assess the safety and well-being of children in the community. In November 2012, The University of North Carolina at Chapel Hill released a report on the Foster Care System in North Carolina. The report revealed key factors that contribute to entry into foster care: caretaker substance abuse, caretaker mental health issues, lack of adequate housing, lack of child development knowledge, and financial problems were the top factors described. Many of these risk factors from that UNC-Chapel Hill report are present in Orange County. According to Orange County's 2011 Community Health Assessment substance abuse, mental health, lack of affordable housing, transportation, sexual abuse/assault, and access to services were of primary concern to Orange County residents all of which are risk factors for abuse and neglect. In 2013-

2014 there were 1,542 domestic violence calls, 360 clients were provided with domestic violence services, and 1,252 calls and 457 clients served due to sexual assault (North Carolina Council for Women, 2013-14). Domestic Violence brings a risk of trauma exposure to children in homes of the families experiencing this problem, which leads to long term consequences of abuse/neglect. Parent Aide services address these risk factors directly in the home by providing concrete parenting education, case management, and advocacy to assist families in finding needed services to address mental health and substance abuse, and transportation assistance. Families at-risk of or involved in abuse/neglect have disproportionality higher levels of poverty and unemployment, limited social support leading to isolation, complex mental health and substance abuse histories, and the presence of domestic violence. Though Parent Aide services cannot wholly improve financial status, we will assist families with supports that will help to buffer the risk of abuse and neglect from factors relating to poverty. For example we can reduce barriers to services and success by helping families to secure adequate housing, assisting with budgeting and effective household management, and helping families access and utilize concrete forms of resources and assistance such as TANF, local food pantries, etc., when applicable. This work is also coupled with intangible assistance, such as helping families improve upon and utilize coping skills and improve family communication and problem solving, while capitalizing on protective factors such as spirituality and cultural roots.

Multiple adverse childhood experiences increases health problems, mental health issues, and high risk behaviors (www.cdc.gov/ace/index.htm) costing Orange County a high rate of tax dollars each year. Child abuse costs the nation $220 million every day (Prevent Child Abuse, Cost Data, 2012). Children that end up in the foster care system often stay in the system longer than a year increasing the cost for taxpayers. From July 2013 to June 2014, 69.76% of the children that were in the Orange County foster care system remained in the system for over a year (Duncan et. al, 2014). This population is difficult to serve due to the stigma attached to child abuse and neglect. Parents' inability to recognize the need for parental skill building and inappropriate discipline also makes this population unique. Early childhood programming and concrete support services (i.e. homeless shelters, food pantries, etc.) often fail to adequately address the above referenced risk factors to prevent these long term effects on families and children thereby increasing the money needed to address co-related problems within society. Failure to invest financially in population-specific targeted services (like Parent Aide in-home visitation services) will cost Orange County more money in the future.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Operational changes in the programs to be considered upon successful funding of the programs are the hiring of a full time Parent Aide staff in Orange County. Current funding amounts only allow for supplemental funds to be added to a present part-time position and do not allow for provision of services to enough families to begin to meet the need in the area. The 18 total families proposed to be served in this application (6 families from Carrboro, 6 families from Chapel Hill, and 6 families from Orange County) are predicated on the proposed budget amount being fully funded. The cost of serving one family in the model for an average of 13 months of service is approximately $2,700. Should the application not be fully funded then the proposed number of families to be served would decrease based on the above average cost per family (i.e. $5,400 funded = 2 families served).

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

Currently the only source of revenue anticipated for 2015-16 is donations by the Hillsborough Exchange Club to assist in covering mileage costs for serving the families in Orange County. The applicant agency continues to look at state, federal, and private foundation funds to provide support to the program in Orange County.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- Department of Social Services and Department of Health: The agency has collaborated with these departments since 2004 providing Intensive Family Preservation and Family Reunification services for families involved in Child Protective Services. The agency has also collaborated with the departments on Child & Family Team Meetings, Permanency Planning meetings, and has collaborated in the past on funding for services in the county. The agency also works closely with the department to access needed governmental services such as Medicaid, Housing, and TANF funds. Both departments also provide the agency with referrals of families that need services. Currently the agency has two Memorandums of Agreement with Orange County's Department of Social Services over treatment programs offered by the agency in the county.

- Department of Juvenile Justice and Orange County Court System: Both have also served in collaboration with our agency by also submitting referrals for assistance with client families dealing with issues of neglect and abuse. Court counselors and lawyers work with the agency through child and family team meetings, court hearings, and other collaborations to ensure client success in treatment.

- Orange County / Chapel Hill School System / UNC-Chapel Hill: Schools within the system are important for identifying families at-risk prior to involvement in child welfare systems. Schools also allow opportunities for a greater awareness of abuse and neglect to be illustrated by supporting our community events that bring awareness to the community in the importance of educating about the signs and directions to take when abuse and neglect is suspected in the children's home. Schools play a key role in assisting the agency in targeted marketing to minority or disadvantaged populations in the county. The University of NC-Chapel Hill works with the agency in providing Master's level Social Work Interns to assist the agency in providing volunteer Parent Aide services in Orange County.

- Mental Health/Social Service Agencies/ Local Mental Health Entities: All these have become more prevalent in making referrals and providing access to services client families might need to achieve their goals. Evaluation assessments administered during our service time in the home can assist the provider in continuing services that will aid in furthering addressing the needs that may be the source of the abuse, such as a parents history of abuse, and other mental health issues that could possibly alleviate the ongoing cycle of neglect and abuse if properly treated, thereby bringing about a total healing. These entities also partner with the agency in community awareness efforts.

- Exchange Clubs/Churches/Business: These entities assist the agency by providing monetary donations, concrete donations for items needed by families, and volunteers for serving families in Orange County.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

The agency primarily uses targeted marketing efforts at reaching subsets of the main population to include various ethnic and minority groups. Services are advertised within the big child welfare agencies/departments such as Health Department, Department of Social Services, and the Orange and Chapel Hill school systems to gain access to families of these populations. However to reach specific groups services are also advertised and referrals are solicited from smaller organizations that target various aspects of the population such as El Futuro. Services are offered free to the community and do not depend on provision of insurance or residential status which provides an incentive for participation. Transportation needs of minority groups are addressed because services are offered in the home. The agency's collaborative efforts within the community also provide for addressing language barriers and cultural barriers in the home. The agency relies on these collaborative relationships to assist with provision of culturally responsive services and the agency also has access to in house bilingual staff, specifically to Spanish-speaking families. Families from other ethnic groups that need translators are outsourced using collaborative partnerships with other agencies.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education		X		X
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring	X	X		X
Transportation	X	X		X
Housing				
Other (Parenting Support)		X		X

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
80% of the participants in the Parent Aide in-home visitation program will show an increase in the safety of the child(ren) in the home, increase parenting and problem-solving skills, and increased social support.	One professional Parent Aide Supervisor/ County Director and one volunteer Parent Aide provided in-home visitation interventions to at-risk families weekly for duration of 1-2 hours for a minimum of 6 months and a maximum of 18 months. Activities in the service included instruction, coaching, role modeling, role playing, parent education, case management, advocacy, & assistance with transportation	Of the 3 families (4 adults & 5 children) who completed participation in the Parent Aide in-home visitation program, 3 out of 3 (100%) discharged successfully and demonstrated an increase in the safety of child(ren) in the home, increase parenting and problem-solving skills, and increased social support. One (1 adult and 6 children) family was discharged at 3 months for lack of participation.	The North Carolina Family Assessment Scale-G+R which measures 9 domains of family functioning: environment, parental capabilities, family interactions, family safety, child wellbeing, social/community life, self-sufficiency, family health, & caregiver/child ambivalence. Protective Factors Survey, retrospective post administration, which measures family functioning/resiliency, social support, concrete support, nurturing and attachment, and knowledge of parenting/child development. Adult/Adolescent Parenting Inventory, pre and post services.

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
80% of the families who complete participation in the Parent Aide in-home visitation program will show an increase in the safety of the child(ren) in the home, increase parenting and problem-solving skills, and increased social support.	One FTE professional Parent Aide will provide in-home visitation interventions to 18 at-risk families weekly for duration of 1-2 hours for a minimum of 6 months and a maximum of 18 months. Activities in the service included instruction, coaching, role modeling, role playing, parent education, case management, advocacy, & assistance with transportation.	Of the 18 families served in the Parent Aide in-home visitation program, 15 of the 18 (83%) will discharge successfully or will be working toward a successful discharge. 83% of the families who have completed participation will demonstrate an increase in the safety of child(ren) in the home, increase parenting and problem-solving skills, and increased social support.	The North Carolina Family Assessment Scale-G+R which measures 9 domains of family functioning: environment, parental capabilities, family interactions, family safety, child wellbeing, social/community life, self-sufficiency, family health, & caregiver/child ambivalence. Protective Factors Survey, retrospective post administration, which measures family functioning/resiliency, social support, concrete support, nurturing and attachment, and knowledge of parenting/child development. Adult/Adolescent Parenting Inventory, pre and post services.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: **Exchange Club Center for the Prevention of Child Abuse of North Carolina, Inc.**

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 6,000	$ 2,500	$ 2,500	0%
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County		$ 2,000	$ 15,800	690%
Town of Chapel Hill		$ 4,000	$ 15,800	295%
Town of Carrboro			$ 15,800	0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
Total Program Revenue	**$ 6,000**	**$ 8,500**	**$ 49,900**	**487%**
PROGRAM EXPENSES				
Compensation	$ 559	$ 4,000	$ 42,000	950%
Rent & Utilities	$ 520	$ 900	$ 3,000	233%
Supplies & Equipment	$ 239	$ 600	$ 900	50%
Travel & Training	$ 2,166	$ 3,000	$ 4,000	33%
Other Expenses:				0
Please list 3 largest "Other Expenses":				
$ -				
$ -				
$ -				
Total Program Expenses	**$ 3,484**	**$ 8,500**	**$ 49,900**	**487%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 2,516**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: One service unit is defined as one home visit.

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	88	80	3484	43.55
Estimated FY14-15	121	117	8500	72.65
Projected FY15-16	864	720	49900	69.31

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Parent Aide Services

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16
1. **Gender**			
Male	6	9	33
Female	8	11	35
2. **Ethnicity**			
African-American	8	3	24
Caucasian	6	5	30
Hispanic		10	11
Other		2	3
3. **Age**			
0-5 Years	3	3	21
6-18 Years	6	7	20
19-50 Years	4	10	27
51+ Years	1		
Unknown			

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16
4. **Geographic Location(s)**			
Durham City			
Durham County			
Raleigh City			
Wake County			
Town of Chapel Hill	6	8	23
Town of Carrboro	3		22
Orange County	5	12	23
Other (specify)			
Per cent of clients at, or below, federal poverty level	5 (35%)	16 (80%)	53 (78%)
TOTAL # OF CLIENTS SERVED	14	20	68

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Exchange Club Center for the Prevention of Child Abuse of North Carolina, Inc.**

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 101,197	$ 104,359	$ 109,577	5%
Agency Generated Revenue (fees)	$ 43,974	$ 58,806	$ 68,911	17%
Local Government Grants:				
Orange County		$ 2,000	$ 15,800	690%
Town of Chapel Hill		$ 4,000	$ 15,800	295%
Town of Carrboro			$ 15,800	0
Other Local: Forsyth County	$ 8,010	$ 28,010	$ 28,010	0%
Other Local: Yadkin County	$ 48,000	$ -	$ -	0
Other Local: Alamance County	$ 39,191	$ 21,920	$ -	-100%
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government	$ 157,326	$ 201,843	$ 201,843	0%
Federal Government	$ 676,745	$ 672,000	$ 672,000	0%
Other Grants: United Way of Forsyth	$ 212,805	$ 212,805	$ 212,805	0%
Other Grants: United Way of Alamance	$ 25,000	$ 18,000	$ 18,000	0%
Miscellaneous/Other Revenue	$ 118,032	$ 44,956	$ 43,016	-4%
Please list 3 largest Miscellanous sources:				
United Funds $ 23,945.00				
Winston-Salem Foundation $ 12,768.00				
NC Exchange Foundation $ 36,000.00				
Total Agency Revenue	**$ 1,430,280**	**$ 1,368,699**	**$ 1,401,562**	**2%**
AGENCY EXPENSES				
Compensation	$ 1,109,503	$ 1,065,421	$ 1,097,384	3%
Rent & Utilities	$ 56,264	$ 50,184	$ 50,664	1%
Supplies & Equipment	$ 71,528	$ 61,685	$ 62,105	1%
Travel & Training	$ 94,284	$ 84,605	$ 84,605	0%
Other Expenses:	$ 94,760	$ 106,804	$ 106,804	0%
Please list 3 largest "Other Expenses":				
Professional Fees $ 85,020.00				
Insurance $ 7,760.00				
Dues $ 1,980.00				
Total Agency Expenses	**$ 1,426,339**	**$ 1,368,699**	**$ 1,401,562**	**2%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 3,941**	**$ -**	**$ -**	**0**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: The Exchange Club Center for the Prevention of Child Abuse of North Carolina, Inc's The Exchange Club's Family Center in Alamance

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Social Worker	18.2	0%	872656	822785	837903	60	R and H
Orange County Parent Aide	1.0	100%	0	4000	36000	3	H
Administrative Professional	3.0	0%	164846	149836	154331	11	
Janitor	0.3	0%	7550	7550	7550	1	
Volunteer Coordinator*	0.5	0%	6401	0	0	0	
Alamance Director	1.0	10%	58050	59800	61600	4	R and H
Volunteer Orange Parent Aide	0.15	15%	0	0	0	0	

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2014 AT 5:00PM

Agency Name: The Hill Center, Inc.

Street Address: 3200 Pickett Road, Durham, NC 27705

Mailing Address: 3200 Pickett Road, Durham, NC 27705

Website Address: www.hillcenter.org

Executive Director: Ms. Beth Anderson

Telephone: 919.719.7585 E-Mail: banderson@hillcenter.org

Contact Person: Ms. Betsy Emerson, Associate Director of Development

Telephone: 919.719.7559 E-Mail: bemerson@hillcenter.org

Fax: 919.485.7466 Federal ID Number: 56-2089788

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$ -0-	$ 10,000.00
Summary of intended use of funds: Funds are requested to provide Hill Center best practices professional development for Orange County Exceptional Children (EC) teachers during the 2014-2015 academic year.		
Town of Chapel Hill	$ 3,000.00	$ 5,000.00
Summary of intended use of funds: Funds are requested to provide Hill Center best practices professional development for 20 Chapel Hill K-12 public school teachers during the 2014-2015 school year. Hill Center administrators and Chapel Hill school leaders have identified specific areas in which Hill Center expertise is needed to better support students in the district who struggle with learning.		
Town of Carrboro	$ 500.00	$ 1,000.00
Summary of intended use of funds: Funds are requested to provide Hill Center best practices professional development for 4 Carrboro K-12 public school teachers during the 2014-2015 school year. Hill Center administrators and Chapel Hill school leaders have identified specific areas in which Hill Center expertise is needed to better support students in the district who struggle with learning.		

Beth Anderson

Executive Director

12/17/14

Date

David B Rotle, EdD

Board Chair

12/19/14

Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency-- including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 1998 as a 501(c)3

   b. Years in Operation: 38 years (established in 1977)

   c. Mission or Vision Statement (if applicable): The mission of The Hill Center is to transform students with learning differences into confident, independent learners.

   d. Brief History of Agency: The Hill Center is an innovative, nationally-recognized educational program based in Durham that provides 1) specialized academic remediation for K-12 public and private school students who struggle with learning differences and ADHD, and 2) best practices professional development programs for teachers. The Hill Center serves a predominately public school population through its many programs. Over the past few years, a large percentage of The Hill Center's student population has come from public schools in Chapel Hill, Carrboro, and Orange County. These families are desperately seeking the individualized remediation offered at Hill for their children who struggle with learning. All Hill Center programs are based on the copyrighted, research-based, multisensory curriculum—called the Hill Methodology—that has been validated in multiple research studies by Duke University, UNC Chapel Hill, RTI International, and others. In 2008, the Center was honored by the National Association of Special Education Teachers as a *National School of Excellence.* Hill has also been nationally-recognized as a provider of professional development for teachers and administrators, as well as by the NC Department of Public Instruction.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). **IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

This proposed collaborative project between The Hill Center and local school districts **will address the identified need for enhanced teacher preparation and improved instructional programming in Orange County Schools and Chapel Hill Carrboro City Schools for students who struggle with learning.** Statistically, students with learning differences are among those most at risk for school failure and eventual dropout. Even with local graduation rates for Chapel Hill/Carrboro and Orange County reported at 90.8% and 86.3% respectively for 2013-2014, the districts are still failing to meet the educational needs of significant

populations of students—and among those, the districts recognize that students with disabilities and minorities are disproportionately represented.

Multiple high level conversations among Hill board members, a CHCCS school board member, staff, and administrators in both Chapel Hill/Carrboro and Orange County Schools have preceded and informed this application. In one of those meetings in November 2104, Hill administrators met with CHCCS leaders. It was collectively agreed that Hill professional development can support the district priorities and efforts, and particularly in terms of reading instruction, but funding resources are needed to do that.

Hill has also been working with the Orange County Schools, most recently through implementation of the Hill Reading Achievement Program (HillRAP) during their summer reading camp program in 2014, but also through teacher involvement in Hill professional development with funding from the NC Dropout Prevention Committee that culminated in 2012.

Hill is an outstanding resource for strengthening local school district efforts on behalf of struggling learners. It is widely recognized among education leaders across the country that most teachers leave their formal education inadequately prepared to effectively teach a classroom full of students with widely varying abilities and learning styles. Significant cuts to the state education budget have drastically reduced funds to districts for professional development in recent years.

Prospects for districts to self-fund professional development for teachers during 2015-2016 are limited, even though new state literacy expectations have been legislated that will require all students to be reading proficient by the end of third grade or be retained. The mandate, called the Read to Achieve legislation, requires schools to enact higher proficiency standards for passing students on to the fourth grade, but does not provide additional funds nor suggest appropriate interventions to help achieve that goal among struggling third graders.

In February 2014, the North Carolina Department of Public Instruction (NCDPI) turned to The Hill Center for professional development and expertise to help fulfill the mandate of the Read to Achieve legislation. A North Carolina foundation provided limited funds for the 27 lowest-performing districts across the state to access Hill online professional development to strengthen reading instruction and help bring struggling third grade readers up to proficient levels, but there is demonstrated need for more such support for all districts in the state, including Chapel Hill-Carrboro Schools and Orange County.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

No programmatic and/or financial changes are being considered at this time.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

The Hill Center is committed to expanding access to its research-validated instructional methodology to all struggling learners, wherever they may be. Every child deserves a teacher who has the instructional skills necessary to unlock their true learning potential. A full-time

development professional supports The Hill Center's efforts to secure external funding to expand and sustain its outreach to additional populations of struggling learners. All Hill programs are evaluated through pre- and post-testing or participant survey, and/or independent evaluation, which demonstrate impact and support future sustainability. Hill has also hired experienced, former public school administrators who work with school districts to develop strategies for district-wide engagement, support, to sustain programs beyond initial funding, and to leverage new sources of funding.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

The Hill Center partners with many outside agencies to increase access to its transformational professional development programs and to reach teachers on a broader geographic basis who serve diverse populations of students. Examples of these partnerships include:

- Currently partnering with the Carolina Hurricanes' Kids 'N Community Foundation in a multi-year literacy project benefiting the John Avery Boys and Girls Club in Durham. Through the project, 135 students per year will benefit from a range of services that will include intensive remediation delivered by Hill-trained tutors, study skills activities, and professional development for John Avery staff members.

- Currently working with Chatham County Schools to provide professional development in literacy for district teachers, with funding from the Oak Foundation.

- Currently partnering with the Duke Energy Foundation to deliver best practices math professional development for middle and high school teachers throughout eastern NC. Workshops will be held in Durham, Carteret, and Lenoir counties during 2014-2015.

- Currently working with the Beaufort County Schools to implement a multi-year, district-wide K-3 literacy initiative, using a blend of funding from the Mebane Charitable Foundation and district resources. Almost 300 struggling learners are currently being served.

- Currently partnering with Mooresville Graded School District in North Carolina to implement the Hill Reading Achievement Program with its lowest performing elementary students. This partnership is growing and will likely be expanded through additional funding from the Mebane Foundation in 2015.

- Currently providing after-school remedial tutoring in reading for 8 disadvantaged elementary students at Seawell Elementary School in Chapel Hill, with funding from the Morgan Creek Foundation. This is the third year of funding from MCF for this initiative.

- Hill-Orange County-NCPTA Dropout Prevention Grant Project—Orange County teachers were trained in Hill reading methodology to work with 40 at-risk high school students during the 2010-2012 school years. The NCPTA provided parent programming to support implementation. In addition, professional development training was provided for Orange County general education teachers. Orange County Schools have continued to implement the reading methodology post-grant funding.

- Provided after-school remedial tutoring in reading for the Grape Arbor After School Program serving disadvantaged middle and high school youth in Chapel Hill and Orange County during 2010-2011 (funding from the Morgan Creek Foundation).

- Collaboratively implemented the Hill Reading Achievement Program (HillRAP) for struggling K-5 readers in Durham elementary schools from 2003-2011, with funding from the NC GlaxoSmithKline Foundation.

- Hill Reading Achievement Program Project implementation with Brunswick County Schools, Carteret County Schools, and Davie County Schools—multi-year funding from Robertson Foundation, Front Street Village, Inc., and the Mebane Charitable Foundation, respectively from 2008-2012.

- Provided after school tutoring for disadvantaged Durham children at Southwest Elementary for four consecutive years—funding by the Carolina Hurricanes Kids 'N Community Foundation from 2009-2012.

- Tutoring initiative for YE Smith Elementary as part of the East Durham Children's Initiative. Also provided professional development for YE Smith Elementary teachers during 2012-2013 through funding from the Duke Energy Foundation.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

In our local community, Hill Center Outreach programs train teachers and tutors in area public schools and after-school programs, enabling Hill to serve a highly diverse population of students in a broad geographic. Diverse populations of students have also been served by Hill-trained teachers and tutors in school and community-based tutoring programs, grant partnerships that target schools with high percentages of free and reduced lunch enrollees, as well as community-based youth-serving programs.

Elsewhere, multi-year grant projects serve diverse populations of urban and rural public school students through public school partnerships (Present partners include Durham Public Schools, Davie County, Brunswick County, Carteret County, Beaufort County, Mooresville Graded School District, Randolph County, Chatham County, and Winston-Salem/Forsyth County). Hill also partners with banking foundations to provide professional development for teachers in their market areas who work in schools with 51% or more students below the poverty level (based on federal free and reduced lunch enrollment information).

For each teacher trained at Hill, a "multiplier effect" is realized: it is estimated that for each teacher trained, 25 students benefit through improved programming and pedagogy per year—with sustained positive impact for years to come.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	X	X		X
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities	X			
After-School Activities	X			
Mentoring				
Transportation				
Housing				
Other – Teacher Professional Development		X		

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
100% of CH teachers who participate in self-selected Hill Center professional development workshops during 2014-15 will report increased strategies for meeting the educational needs of struggling learners in their classroom.	Teachers attend Hill best practices PD offerings (self-selected from an array of 35 offerings that include reading, math, behavioral supports, technology, and school leadership topics).	**YTD: Out of 7 Chapel Hill teachers who attended Hill workshops between July 2014 and January 2015, 100% report satisfaction with the workshop and increased strategies for meeting the educational needs of struggling learners in their classroom.** Five more Chapel Hill teachers will attend future workshops during the funding year. Feedback from the teachers has been universally positive. One teacher at Phillips Middle reported: "I attended the professional development training entitled "Writing Matters" on November 6. It was extremely informative and provided me with ideas and materials to take immediately into the classroom. The materials will provide practice and skill building to my 6-8 grade ESL students."	Teacher self-report through letter Workshop evaluation forms
100% of Carrboro teachers who participate in self-selected Hill professional development during 2014-2015 will report increased	Teachers attend Hill best practices PD offerings (self-selected from an array of 35 offerings that include reading, math, behavioral supports, technology, and school leadership topics).	**YTD: The one Carrboro teacher to date who attended a Hill Center workshop between July 2014 and January 2015 under Carrboro Town Funding reported great satisfaction with the workshop and**	Teacher self-report through letter Workshop evaluation forms

strategies for meeting the educational needs of struggling learner in their classroom.		**increased strategies for meeting the educational needs of struggling learners in her classroom.** She attended Hill's "Writing Matters" workshop in November 2014 and stated, "I am an ESL teacher at Carrboro Elementary School. I have a large population of needy ESL students. They need a lot of support - specifically in writing. This workshop was excellent. It has given me many more ideas on how to best instruct my students in writing. Thank you so much for your investment in education." One more Carrboro teacher will attend a future workshop during the funding year.	

If program(s) did not meet its stated goal(s), please explain:

Enrollments are continuing for Hill Center workshops during 2015. Eight more teachers are enrolled in upcoming workshops that will be conducted before year-end.

B. FY 2015-2016 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
100% of CH teachers who participate in self-selected Hill professional development during 2015-2016 will report increased strategies for meeting the educational needs of struggling learners in their classroom.	Teachers attend Hill best practices PD offerings during 2015-2016 (self-selected from an array of 35 offerings that include literacy, math, behavioral supports, technology, and school leadership topics).	**20** teachers provided best practices professional development. Out of **20** CH K-12 teachers attending Hill best practices professional development during 2015-2016, 100% will report increased strategies for meeting the educational needs of struggling learners in their classroom. Through a multiplier effect, each teacher trained is estimated to serve 25 students per year; thus, for each teacher trained, it is estimated that 25 students will benefit from improved instruction.	Teacher enrollment/attendance at Hill workshops Teacher self-report of learning and satisfaction Overall workshop evaluation forms Multiplier effect: 500 students benefit from improved instruction
100% of Carrboro teachers who participate in self-selected Hill professional development during 2015-2016 will report increased strategies for meeting the educational needs of struggling learners in their classroom.	Teachers attend Hill best practices PD offerings during 2015-2016 (self-selected from an array of 35 offerings that include literacy, math, behavioral supports, technology, and school leadership topics).	**4** Carrboro teachers provided best practices professional development. Out of **4** K-12 Carrboro teachers attending Hill best practices professional development during 2015-2016, 100% will report increased strategies for meeting the educational needs of struggling learners in their classroom. Through a multiplier effect, for each teacher trained, it is estimated that 25 students will benefit from improved instruction.	Teacher enrollment/attendance at Hill workshops Teacher self-report of learning and satisfaction Overall workshop evaluation forms Multiplier effect: 100 students benefit from improved instruction.

100% of Orange County teachers who participate in self-selected Hill professional development during 2015-2016 will report increased strategies for meeting the educational needs of struggling learners in their classroom.	Teachers attend Hill best practices PD offerings during 2015-2016 (self-selected from an array of 35 offerings that include literacy, math, behavioral supports, technology, and school leadership topics).	**40** Orange County teachers provided best practices professional development. Out of **40** K-12 Orange County teachers attending Hill best practices professional development during 2015-2016, 100% will report increased strategies for meeting the educational needs of struggling learners in their classroom. Through a multiplier effect, for each teacher trained, it is estimated that 25 students will benefit from improved instruction.	Teacher enrollment/attendance at Hill workshops Teacher self-report of learning and satisfaction Overall workshop evaluation forms Multiplier effect: 1000 students benefit from improved instruction.

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: The Hill Center, Inc.

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County				0
Town of Chapel Hill	$ 3,000	$ 3,000	$ 5,000	67%
Town of Carrboro	$ 1,000	$ 500	$ 1,000	100%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 4,000**	**$ 3,500**	**$ 6,000**	**71%**
PROGRAM EXPENSES				
Compensation				0
Rent & Utilities				0
Supplies & Equipment				0
Travel & Training				0
Other Expenses:	$ 4,000	$ 3,500	$ 6,000	71%
Please list 3 largest "Other Expenses":				
Workshop Scholarships $ -				
$ -				
$ -				
Total Program Expenses	**$ 4,000**	**$ 3,500**	**$ 6,000**	**71%**
SURPLUS/(DEFICIT) FOR PERIOD:	$ -	$ -	$ -	0

Section IV: Program Statistics and Costs

1) **Define one unit of service**[+]: One unit of service is defined as one professional development workshop per teacher (could include online courses or multi-day workshops; cost range is $99 per online workshop, $250 for 1-day and $450 for 2-day workshop, with average cost of $250).

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	1789	1789	447,250	$250.00
Estimated FY14-15	2000		500,000	$250.00
Projected FY15-16	2100		525,000	$250.00

* Hill workshop rates have remained stable for approximately 10 years.

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS
Program: Hill Professional Development and Teacher Training ("clients below are teachers served on-site and off-site and through online courses.

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male (approximately 12%)	214	240	250	Durham City			
Female (approximately 88%)	1574	1760	1850	Durham County	204	220	
2. **Ethnicity (*estimated)**				Raleigh City			
African-American (20%)	358	400	420	Wake County	78	100	
Caucasian (76.5%)	1368	1530	1606	Town of Chapel Hill	48	50	
Hispanic (2.5%)	46	50	53	Town of Carrboro	6	20	
Other (1%)	17	20	21	Orange County	40	40	
3. **Age (*estimated)**				Other (specify)	1413	1570	
0-5 Years				Per cent of clients at, or below, federal poverty level	Not available	Not available	
6-18 Years							
19-50 Years (60%)	1073	1200	1260				
51+ Years (40%)	716	800	840				
Unknown				***TOTAL # OF CLIENTS SERVED***	1789	2000	2100

*Note: Hill workshop attendees do not report age, gender, or ethnicity; therefore, all numbers are estimates only. Ethnicity numbers reflect state demographics, since Hill has a statewide reach to all school districts.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Hill Center Academic Program ("clients" below are students served on-site at The Hill Center in its school year Academic Program. The numbers do not include students served in on-site and off-site tutoring, public school projects, and other programs – which account for approximately 1500 additional students, many of whom are below the federal poverty level).

Client characteristics	Actual 2013-14	Actual 2014-15	Projected 2015-16
1. **Gender**			
Male	116	109	125
Female	46	61	50
2. **Ethnicity**			
African-American			
Caucasian	135 (83%)	136	140
Hispanic			
Other: Students of Color	27 (17%)	34	35
3. **Age (*estimated)**			
0-5 Years			
6-18 Years	162	170	175
19-50 Years			
51+ Years			
Unknown			

Client characteristics	Actual 2013-14	Actual 2014-15	Projected 2015-16
4. **Geographic Location(s)**			
Durham City			
Durham County	22 (14%)	19 (11%)	
Raleigh City			
Wake County	18 (11%)	17 (10%)	
Town of Chapel Hill	43 (26%)	43 (25%)	
Town of Carrboro	Included in CH number above	Included in CH number above	
Orange County	8 (4%)	7 (4%)	
Other (specify) students from charter schools, private schools, home schools, and other counties	71 (44%)	84 (49%)	
Per cent of clients at, or below, federal poverty level (this % is unknown as the report by client is confidential)	17% receive financial aid	18% receive financial aid	Approx. 18% will receive financial aid
TOTAL # OF CLIENTS SERVED	162	170	175

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: The Hill Center, Inc.

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 1,216,174	$ 1,676,680	Budget pending	#VALUE!
Agency Generated Revenue (fees)	$ 4,089,334	$ 4,301,690		-100%
Local Government Grants:				
Orange County				0
Town of Chapel Hill	$ 3,000	$ 3,000		-100%
Town of Carrboro	$ 1,000	$ 500		-100%
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue	$ 249,800	$ 701,313		-100%
Please list 3 largest Miscellanous sources:				
Investments $ -				
Other $ -				
$ -				
Total Agency Revenue	**$ 5,559,308**	**$ 6,683,183**	**$ -**	**-100%**
AGENCY EXPENSES				
Compensation	$ 3,884,073	$ 4,412,924		-100%
Rent & Utilities	$ 729,459	$ 675,468		-100%
Supplies & Equipment	$ 300,444	$ 564,070		-100%
Travel & Training	$ 75,686	$ 107,400		-100%
Other Expenses:	$ 517,484	$ 923,300		-100%
Please list 3 largest "Other Expenses":				
Bond Fees $ -				
Remission/Financial Aid $ -				
Professional Fees/Consulting $ -				
Total Agency Expenses	**$ 5,507,146**	**$ 6,683,162**	**$ -**	**-100%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 52,162**	**$ 21**	**$ -**	**-100%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: The Hill Center, Inc.

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Directors	5	1	$854,496	$945,985	Budget pending	22%	R, H
Administrative	16	3	$1,009,859	$1,150,923	Budget pending	26%	R, H
Clerical	2	2	$77,682	$89,523	Budget pending	2%	R, H
Faculty	27	1	$1,942,204	$2,226,493	Budget pending	50%	R, H
	50	7			* Budget available in March 2015		

Notes: (Added 6 new staff across organization, which accounts for increase in budget for positions)

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: Total Volunteer Hours = Volunteer FTE

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: Voices Together

Street Address: 5007 Southpark drive, Durham NC 27713

Mailing Address: Same as above

Website Address: www.voicestogether.net

Executive Director: Yasmine White

Telephone: 919-942-2714 E-Mail: yasmine@voicestogether.net

Contact Person: Yasmine White

Telephone: 919-942-2714 E-Mail: yasmine@voicestogether.net

Fax: 919-929-9782 Federal ID Number: 20-4612388

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$	$
Summary of intended use of funds: Summary of intended use of funds: Voices Together specialized program has been in the Orange County Public Schools special education classrooms for five consecutive years with very positive outcomes. Voices Together is requesting a total of $15,000 from Orange County Outside agency in order to fund our specialized program in three classrooms for exceptional children for one year. The total for the entire project is $35k in order to fund all seven exceptional children's classrooms in the district for next year.		
Town of Chapel Hill	$	$
Summary of intended use of funds:		
Town of Carrboro	$	$
Summary of intended use of funds:		

Executive Director	Board Chair
1-23-15	1-22-15
Date	Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation:

      January 12, 2006

   b. Years in Operation:

      8 Years

   c. Mission or Vision Statement (if applicable):

      Our mission is to empower individuals with developmental disabilities to transform their own lives.

Brief History of Agency: Voices Together developed a unique educational and therapeutic model for special education classrooms that is music-based and gives individuals with developmental disabilities the opportunity and tools to self-regulate themselves, express their thought, needs and wants and advocate for themselves. The program was founded and developed by Yasmine White in 2006, at the time serving a group of eight individuals meeting once a week in a one-hour session in Chapel Hill. By 2008 The number of individuals served had taken a leap from 8 individuals to 120 individuals and the program was launched in public school special education classrooms in the Triangle area of North Carolina with remarkable outcomes. Students were noticeably increasing their language and social/emotional skill levels which in turn increased their ability to learn, function and regulate their behaviors.

Today we serve approximately 800, and have been awarded a large fund from The William Kenan , Jr. Charitable Trust to develop and replicate this specialized model nationally. Duke University has formed a partnership with Voices Together to evaluate and measure the program in the schools. Public school administrators and agency administrators have dubbed Voices Together a "best practice," and the program has received award and endorsements from the community. Voices Together has been endorsed by The North Carolina Department of Public Education, The Autism Society of North Carolina, The ARC of North Carolina and the UNC School of Music Education and Special Education, Duke University as well as countless participants, families, and educators.

Jan Riggsbee, EdD, Duke University Professor in the Department of Education stated "I feel that the Voices Together program is a best practice not only for special education but I can see this program in general education."

Voices Together results are supported by data collected from teachers over the last four years. Classroom teachers report seeing positive changes in their students during the school week as a result of the weekly Voices Together program and have become our greatest advocates. As one

public school teacher said, "I have witnessed nonverbal students speak words, reading levels increase, more fluent speech than ever before, and an increase in the confidence of my students."

We have offered effective programming to Orange County Schools for six consecutive years. Each year we have brought in support funding to extend the program to more students and classrooms in the county.

Voices Together is presently serving four school districts and has been in Orange County Schools for six years. As this proposal will show, the data demonstrates that Orange County students have shown marked improvement in skills that generalize to the classroom.

Superintendent G. Patrick Rhodes gave Voices Together his strong endorsement:

> As Superintendent of The Orange County Schools in North Carolina, I would like to give my full endorsement of Voices Together as an organization serving individuals with Exceptional Needs in the North Carolina Public Schools.
>
> With increasing demands for academic and broad scale provision of services for students with developmental disabilities, this program has brought a successful and vital educational model to our schools. Individuals with developmental issues often have great difficulty in areas of basic communication and social skills. These skills are critical to learning in an academic setting and being able to become independent members in our communities.
>
> Teachers have noted the changes and progress in their students in areas of language, self-advocacy and behavior and parents have been thrilled with what has become an established year-end performance where each child has the opportunity to shine for their peers, teachers and family. Their self-confidence and ability to engage with others is essential on their path to becoming independent members of our community.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY). IF MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.

Over the last 12 years, the prevalence of developmental disabilities (DDs) in U.S. children has increased 17.1%—that's about 1.8 million more children with DDs in 2006–2008 compared to a decade earlier.[1] At the same time, the prevalence of autism

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[1] 1 Baio, J. (2012). *Prevalence of Autism Spectrum Disorders — Autism and Developmental Disabilities Monitoring Network, 14 Sites, United States, 2008.* Surveillance Summaries, Centers for Disease Control. 61(SS03);1-19.
2 Baio 2012

increased by a staggering 289.5%.[2] The Centers for Disease Control and Prevention now recognizes that Autism Spectrum Disorders (ASDs) affect one in every 88 individuals,[3] and approximately 1 in 6 children have been diagnosed with a developmental disability.[4]

This dramatic jump has increased the burden on our schools at a time when budgets are tighter than ever. And the costs for services can be substantial. One study found that, in addition to medical costs, intensive behavioral interventions for children with ASDs cost $40,000 to $60,000 per child per year. In a 2006 publication titled "The Costs of Autism," Michael Ganz, assistant professor at the Harvard School of Public Health, estimated that the lifetime costs for caring for and treating a person with ASD in the United States is $3.2 million.

The Orange County Schools has identified approximately 1,036 students with DDs, or 13.7% of the student body. Of those students, there are 65 with ASDs, and the district has nine self-contained classrooms. Curriculum in all disciplines in North Carolina Schools are planned around the North Carolina Standard Course of Study, which includes K-12 Curriculum Standards for all content areas recognized by the North Carolina Department of Public Instruction (DPI). The No Child Left Behind Act requires that all students, including those with the most significant cognitive disabilities, have access to the standard course of study at grade level. The challenge is that these students struggle with basic communication and social skills which makes it much harder for them to learn academic basics.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.
Special Education classroom size and numbers tend to change every year depending on influx of students into the school and out of the district as well. In the year 2015-16 our expectation is that there will be seven classrooms we could potentially serve in The Orange County Public Schools. The cost would be $35,000.

This year, Voices Together was able to sustain programming in the district because of this important grant. Securing $7,000 from The Outside Agency grant in Orange County enabled us to keep the program in two elementary school classrooms.

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3 Baio 2012
4 Boyle, C., Boulet, S., Schieve, L., Cohen, R., Blumberg, S., Yeargin-Allsopp, M., ... Kogan, M. (2011). *Trends in the Prevalence of Developmental Disabilities in US Children, 1997–2008.* Pediatrics. originally published online May 23, 2011, DOI: 10.1542/peds.2010-2989.

In order to reach every classroom for exceptional children in 2015-16, the cost would be $35,000. We very much appreciated the increase from $5000 to $7000 for the 2014-15 school year. Increasing the grant to $15,000 would reduce the amount left to raise from outside sources in order to cover each classroom that has vital needs for support programming. We have foundation and corporate funding that could potentially help us reach that goal for next year.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.
    - Orange County Public Schools- $5,000: This amount is anticipated but never guaranteed in this financial climate where public school funds have been shrinking.
    - Potential foundation or corporate grants $15,000. Each year we been successful as our corporate and foundation partners have awarded us grants to support our efforts in public school.
    - Orange County Outside agency non-profit fund of $15,000

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

Duke University Collaboration

This year Voices Together continues it's collaborative partnership with Duke University. There are two active research evaluation projects in process. One is measuring outcomes of our model in The Durham Public Schools and the other is preparing to launch a research project measuring effectiveness of our teacher toolbox for public school teachers in exceptional children's classrooms. We are working with a team that includes Dr. Geraldine Dawson, Duke Institute for Brain Sciences, Dr. Jan Riggsbee, Duke Department of Education, Dr. Thomas Nechyba, Professor of Economics and Public Policy and Dr. Carol Ripple, Associate Director for Education Research & Engagement, Social Science Research Institute, Duke University Developmental.

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded?

   Our program in the Orange County public schools is diverse in every way as it reaches all levels of disabilities as well as diverse economic and ethnic populations.

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	x	x		x
Health and Nutrition				
Job Training				
Sports and Arts Activities				
Pre-School Activities				
After-School Activities				
Mentoring				
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
80% of students in each classroom will show improvement in at least one skill area	Specialized music therapy program that teaches communication and social /emotional skill building	Out of 60 students that participated, 80% improved in at least one skill area	Pre and post evaluation forms were given to teachers

If program(s) did not meet its stated goal(s), please explain:

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***
85% of students in each classroom will show improvement in a skill area	Communication and Social /Emotional Learning Curriculum	Out of 90 students that will participate we expect 90% to show some improvement in a skill area	Pre and post evaluation forms were given to teachers

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Voices Together

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations				0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ 5,000	$ 7,000	$ 15,000	114%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local: Orange County Schools	$ 5,000		$ 5,000	0
Other Local: Rite Aid/Fox Family Fdtns	$ 20,000			0
Other Local:			$ 15,000	0
provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ 30,000**	**$ 7,000**	**$ 35,000**	**400%**
PROGRAM EXPENSES				
Compensation	$ 24,000	$ 5,000	$ 27,350	447%
Rent & Utilities	$ 815	$ 750	$ 2,365	215%
Supplies & Equipment	$ 836	$ 500	$ 850	70%
Travel & Training	$ 445	$ 100	$ 500	400%
Other Expenses:	$ 3,904	$ 650	$ 3,935	505%
Please list 3 largest "Other Expenses":				
Professional Fees $ 2,100.00				
Program Supplies $ 1,283.00				
Bus. exp (ins., marketing) $ 521.00				
Total Program Expenses	**$ 30,000**	**$ 7,000**	**$ 35,000**	**400%**
SURPLUS/(DEFICIT) FOR PERIOD:	$ -	$ -	$ -	0

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: One school year of group provided to one student

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14	60	60	$30,000	$500
Estimated FY14-15	20		$10,000 ($3000 provided by Voices Together)	$500
Projected FY15-16	70		$35,000	$500

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program:

Client characteristics	Actual 2013-14	Estimated 2014-14	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	%65	%65	%65	4. Durham City			
Female	%35	%35	%35	Durham County	120	160	200
2. **Ethnicity**				Raleigh City			
African-American	%10	%10	%10	Wake County			
Caucasian	%75	%75	%75	Town of Chapel Hill			
Hispanic	%5	%5	%5	Town of Carrboro			
Other	%5	%5	%5	Orange County	70	23	80
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years	%80	%100	%80	Per cent of clients at, or below, federal poverty level	%30	%30	%30
19-50 Years	%20		%20				
51+ Years						23	
Unknown				*TOTAL # OF CLIENTS SERVED*	70		80

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Voices Together

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 21,815	$ 30,000	$ 35,000	17%
Agency Generated Revenue (fees)	$ 40,531	$ 44,000	$ 45,000	2%
Local Government Grants:				
Orange County	$ 3,000	$ 7,000	$ 15,000	114%
Town of Chapel Hill				0
Town of Carrboro				0
Other Local: See Separate List	$ 106,250	$ 121,250	$ 126,250	4%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way				0
State Government				0
Federal Government				0
Other Grants: Foundations	$ 165,225	$ 300,000	$ 305,000	2%
Other Grants: Corporations	$ 39,000	$ 60,000	$ 95,000	58%
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	$ 375,821	$ 562,250	$ 621,250	10%
AGENCY EXPENSES				
Compensation	$ 290,056	$ 415,200	$ 456,720	10%
Rent & Utilities	$ 28,655	$ 39,714	$ 43,685	10%
Supplies & Equipment	$ 18,145	$ 20,325	$ 22,358	10%
Travel & Training	$ 3,431	$ 5,000	$ 5,500	10%
Other Expenses:	$ 57,871	$ 79,550	$ 87,505	10%
Please list 3 largest "Other Expenses":				
Professional Fees $ 48,413.00				
Bus. Exp. (insurance, marketing $ 7,324.00				
Fixed Asset Purchases $ 2,134.00				
Total Agency Expenses	$ 398,158	$ 559,789	$ 615,768	10%
SURPLUS/(DEFICIT) FOR PERIOD:	$ (22,337)	$ 2,461	$ 5,482	123%

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: **Voices Together**

AGENCY REVENUE		Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Local Government Grants:					
Other Local:	County of Durham	11,250	11,250	11,250	0%
Other Local:	Durham Public Schools	45,000	45,000	45,000	0%
Other Local:	Alamance-Burlington School System	30,000	30,000	30,000	0%
Other Local:	Chatham County Schools	15,000	35,000	35,000	0%
Other Local:	Orange County Schools	5,000		5,000	0
		$ 106,250	$ 121,250	$ 126,250	4%

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name:

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
President/CEO	1		82039	87844	96628	2	H
Music Therapists: FY14 = 4, FY15 = 4.25, FY15 = 5	5		137039	202185	222403	4	H
Office staff: FY14 = 2.25, FY15 = 1.25, FY16 = 2	2		71039	122,105	134315	2	H

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$

Outside Agency Funding Application
July 1, 2015 through June 30, 2016
APPLICATION DUE FRIDAY, JANUARY 23, 2015 AT 5:00PM

Agency Name: **Volunteers for Youth, Inc.**

Street Address: 205 Lloyd Street, Suite 103 Carrboro, NC 27510

Mailing Address: 205 Lloyd Street, Suite 103 Carrboro, NC 27510

Website Address: www.volunteersforyouth.org

Executive Director: Susan Prothro Worley

Telephone: 919-967-4511 E-Mail: susan@volunteersforyouth.org

Contact Person: Susan Worley

Telephone: 919-967-4511 E-Mail: susan@volunteersforyouth.org

Fax: 919-967-4540 Federal ID Number: 58-1457945

Funding Source Summary – **Briefly state how any awarded funds would be used.**	**Current Funding (FY14-15)**	**Requested Funding (FY15-16)**
Orange County Government	$0	$15,000
Summary of intended use of funds: Funding will support the new mentoring partnership, expanding mentoring opportunities to more court-involved youth and youth in Orange County schools while providing their families with support.		
Town of Chapel Hill	$8,000	$10,000
Summary of intended use of funds: Funding will support the following services to delinquent and at risk Orange County youth: • **mentoring partnership,** providing trained adult mentors to spend time with youth • **community service**, overseeing the court-ordered volunteer work of young people • **teen court**, an alternative to regular court, staffed by teen volunteers		
Town of Carrboro	$2,200	$3,000
Summary of intended use of funds: Funding will support the following services to delinquent and at risk Orange County youth: • **mentoring partnership,** providing trained adult mentors to spend time with youth • **community service**, overseeing the court-ordered volunteer work of young people • **teen court**, an alternative to regular court, staffed by teen volunteers		

Executive Director Board Chair

Date Date

Section I: Agency and Program Overview

1. Please provide a brief history of the agency– including mission, date of incorporation and years of operation.

   a. Date of Incorporation: 1981

   b. Years in Operation: 33

   c. Mission or Vision Statement (if applicable): Volunteers for Youth provides services to Orange County youth to integrate them into the community in ways that help them make responsible choices and recognize that they have a stake in their future.

   d. Brief History of Agency: Volunteers for Youth, Inc. (VFY) is a youth serving organization, meeting the needs of delinquent and high risk young people in Orange County since its incorporation in 1981. Formed by professionals in our community who worked with court-involved youth, VFY is the only Orange County nonprofit agency dedicated to serving youth who have broken laws or who are at-risk of doing so. VFY seeks to bridge the gap between disconnected youth and the community through one-on-one and group mentoring, community service, and teen court programs.

PLEASE ANSWER QUESTIONS 2 THROUGH 7 BELOW REGARDING THE SPECIFIC PROGRAM(S) FOR WHICH THE AGENCY IS REQUESTING FUNDING (NOT FOR THE ENTIRE AGENCY**). IF** MORE THAN ONE PROGRAM IS REQUESTING FUNDING, PLEASE IDENTIFY EACH BY LABELING, IE: PROGRAM 1, PROGRAM 2, ETC. UNDER EACH QUESTION.

2. Describe the identified community need(s) the Program(s) funded will address.
   Although Orange County is sometimes seen as a problem-free mecca of affluence and educational opportunity, there are significant numbers of young people throughout the county who have run afoul of the law or are at risk for doing so. According to statistics compiled by the Division of Juvenile Justice, 161 complaints against juveniles were lodged in Orange County in fiscal year 2013-14. These juveniles usually come before the court with multiple risk factors for future challenges. Almost every one of these court-involved young people in Orange County receives services through Volunteers for Youth and many others who are at risk for delinquency are served as well.

   Mentoring is an effective tool in delinquency prevention but older, court-involved, and isolated youth are less likely than other youth to participate in traditional one-one mentoring programs. Juvenile court judges and court counselors have expressed the need for ways to engage young people they see in court with mentors and to provide support to the families of those young people. Personnel in the Orange County schools see a need for students in rural areas to participate in mentoring programs. The new mentoring partnership described in Question 3 is designed to meet those needs.

3. Describe any operational and/or financial changes being considered in the Program(s) to be funded for FY 2015-16.

Volunteers for Youth looks forward to launching a new and exciting mentoring partnership in 2015-16. Designed to target hard to reach populations such as older adolescents, court-involved youth, and residents of rural Orange County, the partnership will offer three mentoring options.

Group mentoring: Older youth and those in legal trouble are often unwilling to commit to a one-on-one relationship with an adult and prefer to engage with peers. These youth will be offered the opportunity to participate in a weekly group with other people their age, facilitated by a group of adult volunteers who will serve as positive role models and introduce the youth to new and enriching activities. An ongoing group, it will have the added advantage of being immediately available when a youth is in crisis and most in need of adult guidance and friendship.

School-based mentoring: In designated middle schools in both school systems in the county, groups of students who have been identified as needing the time and attention of positive role models will meet on a weekly basis. Facilitated by Volunteers for Youth staff members and volunteers, this group, like the first, will give the students an opportunity to forge positive relationships with adults and to be introduced to new information and activities.

One-on-one mentoring: Adult volunteers will be paired one-on-one with children and will spend time with them weekly in a "big brother/big sister" type of relationship. Best suited to younger children, this is the traditional form of mentoring that Volunteers for Youth has operated for more than thirty years.

The partnership will be an expansion of our existing mentoring program that Volunteers for Youth has operated for more than thirty years. Working in coordination with the school systems, the court system, Dispute Settlement Center, and FAN, the goal of the partnership is to bring positive adult influences into the lives of the hardest-to-reach young people and to provide support to their families. Primary funding is being sought from Orange County and the United Way of the Greater Triangle.

4. Outline anticipated internal or external revenue sources, for the program. Indicate whether these are ongoing or new sources.

- United Way of the Greater Triangle - $30,000 (ongoing source with additional new funding)
- Special events (Larry Fedora Golf Tournament) - $2,000 (ongoing)
- Individual donations - $2,429 (ongoing)
- Orange County - $15,000 (new)*
- Town of Chapel Hill - $2,000 (ongoing source with additional new funding)
- Town of Carrboro - $800 (ongoing source with additional new funding)

*Orange County provides a 30% match to the money Volunteers for Youth receives from the Division of Juvenile Justice for our community service and teen court programs. Orange County has not awarded outside agency funding to Volunteers for Youth for several years. The $15,000 request is to Orange County for outside agency funding to fund the new Mentoring Partnership.

5. Give specific examples of your agency's coordinated/collaborative efforts with other outside agencies which accomplish or enhance the Projected Results in the Program(s) to be funded. (if possible, please bullet list)

- Orange County Office of Juvenile Justice – VFY staff works closely with court counselors to monitor progress of youth in our program
- UNC's SMART Project – In coordination with the Buckley Public Service Scholars Program at the UNC Center for Public Service, VFY recruits, screens, trains, and supervises UNC students who serve as mentors to local kids while taking classes related to their mentoring experience
- Mentoring Partnership – In our proposed new mentoring initiative, VFY will partner with the Family Advocacy Network of Mental Health America of the Triangle, Dispute Settlement Center, Boomerang, the Orange County and Chapel Hill-Carrboro schools, and an alumni chapter of Alpha Kappa Alpha, to provide support to delinquent youth and their families
- Happymess Art Studio – VFY contracts with Holly Phelan at Happymess to provide arts experiences for program participants
- Chapel Hill Police Department – VFY coordinates with the police department to send program participants on an annual, out of state, three-day field trip with a focus on African-American history
- International Youth Forum – VFY provides space for weekly meetings of undocumented youth and their allies
- Third Sector Alliance – VFY's executive director spearheads an alliance of nonprofit organizations in Orange County aimed at strengthening the voice of local nonprofits for the benefit of our clients

6. How does your agency reach out to various ethnic and minority groups in the community to accomplish or enhance the results of the Program(s) to be funded? Forty-five percent of the youth served by VFY are African-American and twenty percent are Latino. VFY actively recruits volunteers from campus groups, civic groups and faith-based organizations that represent diverse communities. VFY staff and board diversity also reflect the organization's commitment to reaching diverse populations. One of our board members is the parent of two former program participants. In 2008, Volunteers for Youth was the proud recipient of the Bridge Builders Award, given by the University/Community MLK, Jr. Planning Corporation "in recognition of work and leadership to eliminate barriers based on race/ethnicity, religion, and social and economic conditions among the diverse communities of Orange County."

7. Place an "X" in the box that best describes the category of Program(s) to be funded (multiple selections are permitted).

Category	Youth	Adult	Older Adults	Persons with Disability
Education	x			
Health and Nutrition				
Job Training	x			
Sports and Arts Activities	x			
Pre-School Activities				

After-School Activities	x			
Mentoring	x			
Transportation				
Housing				
Other				

Section II: Program Results

A. FY 2013-14 Programs and Outcomes

If the Program is ongoing, show the results for the previous year (FY 2013-14). If you did not meet Projected Program Result(s) provide an explanation in the designated space situated below the chart.

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Actual Results for FY 13-14	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	***Counselor meets with students, as the first contact, for students referred for minor infractions.***	***Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)***	***School records were checked to verify that students had not been suspended.***

If program(s) did not meet its stated goal(s), please explain:

_____

_____

B. FY 2014-15 Programs and Anticipated Outcomes

If more than one program is requesting funding, provide a separate chart for each program.

Stated Program Goals	Program Activities	Anticipated Results for FY 15-16	Evaluation Method
Example: 80% of after-school attendees will not be re-suspended	*Counselor meets with students, as the first contact, for students referred for minor infractions.*	*Out of 100 students participating in the program, 90 remained in good standing with the school system. 90% result (above goal)*	*School records were checked to verify that students had not been suspended.*
• ***At least 80% of youth will have no new charges while in the program.***	***Oversee volunteers and youth in mentoring relationships and groups while coordinating with other programs in the mentoring initiative to provide family and individual support.***	***80% or more of the youth participants will have no new charges while in the program.***	***Contact court counselors regularly and maintain data collected in statewide database, NC Allies, while meeting regularly with other programs in the mentoring initiative.***
• ***At least 70% of youth will successfully complete their program commitment.***	***Oversee volunteers and youth in mentoring relationships and groups while coordinating with other programs to provide family and individual support.***	***80% or more of youth will successfully complete their program commitment.***	***Track clients' progress through contact with clients, their families, their mentors, and court counselors and maintain individual records on each client.***

Section III. Program Information
Program Budget Worksheet

AGENCY NAME: Volunteers for Youth, Inc. (Mentoring Partnership)

PROGRAM REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations			$ 4,429	0
Program Generated Revenue (fees)				0
Local Government Grants:				
Orange County			$ 15,000	0
Town of Chapel Hill			$ 2,000	0
Town of Carrboro			$ 800	0
Other Local:				0
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way			$ 30,000	0
State Government				0
Federal Government				0
Other Grants:				0
Other Grants:				0
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Program Revenue	**$ -**	**$ -**	**$ 52,229**	**0**
PROGRAM EXPENSES				
Compensation			$ 47,813	0
Rent & Utilities			$ 1,397	0
Supplies & Equipment			$ 700	0
Travel & Training			$ 500	0
Other Expenses:			$ 1,819	0
Please list 3 largest "Other Expenses":				
Group Activities $ 700.00				
Insurance $ 400.00				
Volunteer training and support $ 300.00				
Total Program Expenses	**$ -**	**$ -**	**$ 52,229**	**0**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ -**	**$ -**	**$ -**	**0**

Section IV: Program Statistics and Costs

If you are seeking funding for more than one Program, please submit separate form for each.

1) Define one unit of service[+]: One young person participating in Volunteers for Youth

Fiscal Year	Total Program Units	Total Program Units that Met Program Goals	Total Program Cost	Program Unit Cost++ = Total Program Cost ÷ Total Program Units that Met Goal
Actual FY13-14				
Estimated FY14-15				
Projected FY15-16	40	32	52,229	$1,632

Defining a Unit of Service[+]

- In a brief statement, define one unit of service for each program
  Example: A Homeless Shelter may define a unit of service as one bed night provided to a homeless individual at the shelter or the placement of an individual into a permanent residence.

Notes regarding Program Unit Cost[++]

- Units of cost are units of activity. The most inexpensive unit cost may be the most expensive program.

  Example: Agency X provides training to reduce violence at a cost of $10 per student (total cost of training is $5,000 with 500 students participating). Follow up reveals that 5 students adopt the program recommendations. The unit of results, then, is $1,000 ($5,000/5=$1,000)

  Agency Y provides similar training to 500 students at a cost of $40 (total cost of training is $20,000). Follow up reveals that 40 students adopt the program recommendations. The unit of result in this case is $500 ($20,000/40=$500).

- Unit costs are not always what they seem.

  Example: If a high school drop-out prevention program has students who participate 5 days a week for 16 weeks at a daily cost of $150, the cost per student is $12,000. If we know, though, that the program serves only 20 students at a time and that 5 out of every 20 students do not graduate, the cost per graduate is $16,000 (total cost of $240,000 for 16 weeks/15=$16,000).

Section V: Program Beneficiary Demographics

If you are seeking funding for more than one Program, please submit a separate form for each. Please use **real numbers**, not percentages, for all units. Additional notes can be provided below the chart if needed.

PROGRAM BENEFICIARY DEMOGRAPHICS

Program: Volunteers for Youth, Inc.

Client characteristics	Actual 2013-14	Estimated 2014-15	Projected 2015-16	*Client characteristics*	Actual 2013-14	Estimated 2014-15	Projected 2015-16
1. **Gender**				4. **Geographic Location(s)**			
Male	108	112	138	Durham City	3		
Female	97	103	112	Durham County			
2. **Ethnicity**				Raleigh City			
African-American	93	97	113	Wake County			
Caucasian	65	69	75	Town of Chapel Hill	98	97	105
Hispanic	41	43	55	Town of Carrboro	21	25	30
Other	6	6	7	Orange County	83	93	115
3. **Age**				Other (specify)			
0-5 Years							
6-18 Years	205	215	250	Per cent of clients at, or below, federal poverty level	30% (estimate)	30% (estimate)	30% (estimate)
19-50 Years							
51+ Years							
Unknown				***TOTAL # OF CLIENTS SERVED***	205	215	250

Section VI. Financial Data
Comparative Budget for Entire Agency

AGENCY NAME: Volunteers for Youth, Inc.

AGENCY REVENUE	Actual 2013-14	Estimated 2014-15	Projected 2015-16	Percent Change
Private Donations	$ 31,145	$ 35,000	$ 46,000	31%
Agency Generated Revenue (fees)				0
Local Government Grants:				
Orange County	$ -	$ -	$ 15,000	0
Town of Chapel Hill	$ 8,000	$ 8,000	$ 10,000	25%
Town of Carrboro	$ 2,200	$ 2,200	$ 3,000	36%
Other Local: JCPC match from Orange County	$ 37,520	$ 37,520	$ 37,520	0%
Other Local:				0
Other Local:				0
If more than 3 sources, please provide a separate list.				
Non-Local Government Grants				
Triangle United Way	$ 19,648	$ 19,696	$ 30,000	52%
State Government	$ 125,078	$ 125,078	$ 125,078	0%
Federal Government				0
Other Grants: Corporate/Foundations	$ 33,950	$ 15,000	$ 35,000	133%
Other Grants: CDBG	$ 4,000	$ 3,000	$ 3,000	0%
Miscellaneous/Other Revenue				0
Please list 3 largest Miscellanous sources:				
$ -				
$ -				
$ -				
Total Agency Revenue	**$ 261,541**	**$ 245,494**	**$ 304,598**	**24%**
AGENCY EXPENSES				
Compensation	$ 181,088	$ 183,868	$ 224,773	22%
Rent & Utilities	$ 27,480	$ 27,532	$ 27,944	1%
Supplies & Equipment	$ 13,445	$ 12,000	$ 14,000	17%
Travel & Training	$ 2,313	$ 1,500	$ 1,500	0%
Other Expenses:	$ 37,130	$ 32,000	$ 36,381	14%
Please list 3 largest "Other Expenses":				
Group activities	$ 9,369	$ 4,000	$ 5,000	
Insurance	$ 8,950	$ 8,500	$ 9,500	
Fundraising	$ 5,611	$ 7,500	$ 8,000	
All other	$ 13,200	$ 11,000	$ 13,881	
Total Agency Expenses	**$ 261,456**	**$ 256,900**	**$ 304,598**	**19%**
SURPLUS/(DEFICIT) FOR PERIOD:	**$ 85**	**$ (11,406)**	**$ -**	**100%**

Section VII: Schedule of Positions

Please include **all** paid staff positions followed by volunteer positions; these financial figures should match the personnel figures in your Agency Comparative Budget Excel Form. Similar positions can be combined. (i.e., 8 Occupational Therapists can be inserted as one line item).

Agency Name: Volunteers for Youth, Inc.

Position Titles * = Position Vacant	Full Time Equivalent**	Program Staff +	Actual 2013-14	Estimated 2014-15	Projected 2015-16	% Total Budget	If provided, indicate: (R) Retirement Plan (H) Health Plan
Executive Director	1.0	80	54,678	55,866	57,053	19%	(R)*
3 Program Coordinators	1.0	100	100,216	109,589	114,286	38%	(R)*
Mentoring Partnership Coordinator					31,800	10%	(R)*
Volunteer hours	2.5						

***As of January 1, 2015, Volunteers for Youth staff members no longer receive compensation for health insurance due to changes in regulations that made our previous compensation system illegal. To compensate, all staff members received a pay increase.**

Notes:

- **Similar positions can be combined: i.e. 8 Occupational Therapists can be inserted as one line item.**
- ** Full time staff will be noted as 1.00; half time as .50; quarter time as .25, etc.
- + Denotes the percentage of staff time involved with program, if applicable. If applying for multiple programs, write the percentage followed by the program number in parentheses.
- Calculate a Full Time Equivalent for all recorded volunteer hours using the following: $\frac{\text{Total Volunteer Hours}}{1{,}960} = \text{Volunteer FTE}$