

INTEROFFICE MEMORANDUM

June 1, 2015

MEMO TO: Ruffin Hall, City Manager

FROM: Kirsten Larson, Grants Program Administrative Manager

SUBJECT: Budget Note 09 – Other Outside Agency Grant Requests Follow-Up

Council requested additional information regarding Other Outside Agency grant requests following the FY16 Manager’s Proposed Budget presentation. In response, this budget note includes the step-down options presented to Council at their April 2nd budget work session and specific information regarding the requests of the agencies that applied through the Other Outside Agency grant process.

Funding Options

Below are the options for those agencies historically funded by Council whose grant funding request exceeded the 25% maximum funding policy as they were presented to Council at the April budget work session. Options 1 and 2 move the level of agency funding into policy compliance over a three year period. Option 1 is included in the FY16 Proposed Budget.

Option 1: Staff Recommendation (No Budget Impact)

Implement a three-year step down in funding to reduce the maximum funding awarded by equal percentage amounts over three years, starting in FY16, and achieving the 25% maximum funding level by FY18.

This approach allows for a consistent and steady decrease in maximum funding to these organizations until they are in policy compliance. The amount of funding allocated to each agency for this option (which, as mentioned, is included in the FY16 Proposed Budget) is illustrated in the table below:

<u>Agency Name</u>	FY15 Adopted	FY16 Request	FY16 %	FY16 Maximum	FY17 %	FY17 Maximum*	FY18 %	FY18 Maximum*
African American Cultural Festival	75,000	75,000	44.4%	61,547	39.0%	54,215	25%	34,642
Hillsborough Street CSC*	131,000	132,500	28.1%	125,513	26.6%	118,526	25%	111,539
Southeast Raleigh Assembly	207,000	207,000	72.3%	155,981	48.6%	104,961	25%	53,942
Total:				\$ 343,041		\$ 277,702		\$ 200,122

Note: Maximum dollar funding limits in FY17 and FY18 would be based on expense actuals.

**Maximum funding percentage improved from 31.9% to 29.7% after applying Stanhope pilot funding.*

Option 2: (Budget Impact: \$50,021)

Implement a three-year step down in funding to reduce the maximum funding awarded by 10% of the policy gap in FY16 with the remaining gap spread evenly in FY17 and FY18.

This approach provides the organizations with a lesser impact in year 1 of the step down in funding and then spreads the remaining gap evenly in FY17 and FY18. The table below illustrates how this option would impact each of the three organizations.

Agency Name	FY15 Adopted	FY16 Request	FY16 %	FY16 Maximum	FY17 %	FY17 Maximum*	FY18 %	FY18 Maximum*
African American Cultural Festival	75,000	75,000	51.2%	70,964	38.1%	52,803	25%	34,642
Hillsborough Street CSC*	131,000	132,500	29.2%	130,404	27.1%	120,971	25%	111,539
Southeast Raleigh Assembly	207,000	207,000	88.8%	191,694	56.9%	122,818	25%	53,942
			Total:	\$ 393,062		\$ 296,592		\$ 200,122

Note: Maximum dollar funding limits in FY17 and FY18 would be based on expense actuals.

**Maximum funding percentage improved from 31.9% to 29.7% after applying Stanhope pilot funding.*

Option 3 – Alternative: (Budget Impact: \$69,959)

Restore agencies to FY15 adopted funding levels. The cost of funding this alternative in the FY16 budget is \$69,959. This funding would restore all three agencies back to FY15 adopted budget levels. Should Council wish to pursue this alternative, sufficient funding exists within the Other Outside Agency reserve proposed at \$220,000.

Other Outside Agency Grant Requests – Additional Information

Funding is not included in the FY16 Proposed Budget for seven of the agencies that submitted funding requests through the Other Outside Agency grant process. Those agencies and the amount of funding they requested are listed in the table below.

New Agency Requests in FY16

Marbles Kids Museum	25,000
Nessie	237,000
Raleigh Area Dev Authority	133,845
Raleigh Sister Cities	1,300
Rebuilding Together of the Triangle	40,000
Transitions Life Care (Hospice)	250,000
Joel Lane House	11,500

The Nessie Foundation and Transitions LifeCare/Hospice have communicated their willingness for their funding request to be spread over three years and four years, respectively.

Attached is an excerpt of the proposed budget document pages on agency grant allocations. Also attached are summaries of the FY16 Other Outside Agency grant applications. The information under the “Applicant-Provided Information” has been provided directly by the agencies. Supplemental letters received from agencies as part of their submission are included with the summaries.

Other Outside Agency Grants

Through its Other Outside Agency grants process, the City of Raleigh provides funding to non-profit organizations for programs and projects that fall outside the parameters of the City's established Arts, Human Services or Community Enhancement grant programs. Sixteen agencies applied for other outside agency funding in FY16 totaling \$1,737,000. Of these sixteen agencies, nine received grant funding in FY15: Chamber of Commerce, Downtown Raleigh Alliance, Hillsborough Street Community Service Corporation, Southeast Raleigh Assembly, African American Cultural Festival, DHIC, Catholic Charities (Homeless Support Circles), Passage Home and Boys & Girls Club.

Funding in FY16 is proposed to continue for six of the nine recurring agencies at the same level as these agencies were funded by the City in FY15. They are Chamber of Commerce, Downtown Raleigh Alliance, DHIC, Catholic Charities, Passage Home and Boys & Girls Club (final year of five-year capital grant allocation).

Three recurring agencies, Hillsborough Street Community Service Corporation, Southeast Raleigh Assembly, and African American Cultural Festival requested funding in FY16 that exceeds the City's 25% maximum grant funding policy. Staff proposes a funding strategy to bring these agencies into compliance with the 25% maximum funding policy over a three year period by spreading the "percentage gap" in excess of the policy evenly across the three years. The table below illustrates this recommendation and shows the maximum percentage of each agency's prior fiscal year actual expenditures that may be awarded as a grant from the City in FY16, FY17 and FY18.

	Current %	Annual % Reduction	FY16 Max %	FY17 Max %	FY18 Max %
Hillsborough Street CSC	29.7%	1.6%	28.1%	26.6%	25.0%
Southeast Raleigh Assembly	95.9%	23.6%	72.3%	48.6%	25.0%
African American Cultural Festival	54.1%	9.7%	44.4%	34.7%	25.0%

Funding of \$220,000 is proposed as an agency reserve to align the total Other Outside Agency with the FY15 appropriation and is available for City Council to allocate.

Additional information regarding the Other Outside Agency grants program may be obtained by contacting Kirsten Larson, Grants Program Administrative Manager, at (919) 996-4726 or via e-mail at Kirsten.Larson@raleighnc.gov.

Budget Detail

	ADOPTED 2013-14	ADOPTED 2014-15	AGENCY REQ 2015-16	PROPOSED 2015-16	% CHANGE FY15 To FY16
No Funding Requested in FY16 - Econ Dev					
Raleigh Bus & Tech Center	152,000	-	-	-	0.0%
Blue Ridge Alliance	-	50,000	-	-	0.0%
New Bern Alliance	-	50,000	-	-	0.0%
Recurring Agencies - Economic Development					
Chamber of Commerce	220,000	170,000	200,000	170,000	0.0%
Downtown Raleigh Alliance	158,450	108,450	114,855	108,450	0.0%
Hillsborough Street CSC	131,000	131,000	132,500	125,513	(4.2%)
SE Raleigh Assembly	207,000	207,000	207,000	155,981	(24.6%)
Recurring Agencies - Other					
African American Cultural Festival	75,000	75,000	75,000	61,547	(17.9%)
DHIC	108,000	108,000	108,000	108,000	0.0%
Homeless Supp Circles/Catholic Charities	44,000	51,000	51,000	51,000	0.0%
Passage Home	90,000	90,000	100,000	90,000	0.0%
Boys & Girls Club*	50,000	50,000	50,000	50,000	0.0%
New Agency Requests in FY16					
Marbles Kids Museum	-	-	25,000	-	0.0%
Nessie	-	-	237,000	-	0.0%
Raleigh Area Dev Authority	-	-	133,845	-	0.0%
Raleigh Sister Cities	-	-	1,300	-	0.0%
Rebuilding Together of the Triangle	-	-	40,000	-	0.0%
Transitions Life Care (Hospice)	-	-	250,000	-	0.0%
Joel Lane House	-	-	11,500	-	0.0%
Other Outside Agency Reserve	-	-	-	220,000	
TOTAL OTHER OUTSIDE AGENCIES	\$ 1,235,450	\$ 1,090,450	\$ 1,737,000	\$ 1,140,491	4.6%

*FY16 is the final year of a five-year City of Raleigh commitment.



FY16 Other Outside Agency Funding Request Catholic Charities (Homeless Support Circles)

Funding Request Summary – Catholic Charities requests \$51,000 for support of the rental subsidy portion of the Homeless Support Circles program.

FY16 City Funding Requested	FY15 City Funding Received	FY16 Agency Total Budget	FY14 Total Actuals	Request as % of FY14 Actuals (25% Policy)
\$51,000	\$51,000	\$290,827	\$3,743,954	1.4%

Applicant-Provided Information:

Agency and Program Description

Catholic Charities of the Diocese of Raleigh, Inc. has 8 regional offices throughout the eastern half of N.C. The Raleigh Regional Office of Catholic Charities served over 52,000 Wake County residents last year through its array of services including mental health services, a Hispanic Family Center, Oak City Outreach Center, Catholic Parish Outreach Center, Adoption services and the Support Circle Program for Homeless Families.

The Support Circle program moves families from homelessness into permanent housing and stable lives by recruiting and training various churches/synagogues to form Support Circles comprised of 6 to 8 volunteer mentors. The program was initiated by the Raleigh Wake Partnership to End and Prevent Homelessness which asked Catholic Charities to coordinate the program. Catholic Charities is privileged to coordinate this broad based ecumenical effort with over 80 congregations from 13 different denominations participating thus far. Funding for the program comes from the City of Raleigh, Wake County, local congregations, businesses, corporations, individual donors and foundations.

Highlights of Agency Funding Request

Short/Long term benefits to public: The short term benefit for the families served is that they are able to move out of homeless shelters and into permanent housing. Their children benefit from having their own home and not having to share rooms in the shelter with other families. They get the stability that comes from having a permanent address. The Support Circles also work with the families to connect them to medical and dental providers if they are not already connected. And the children receive tutoring from Support Circle members and/or get help accessing after school programs and summer programs. Families are also able to secure furniture for their new housing and in about half of our families also receive cars from Wheels for Hope. The long term benefit is that families attain stability which leads to increased employment and income for the parents and increased school performance for the children. Research shows that children who are homeless have poorer health and educational outcomes than similar children who are housed. Stable housing and better economic security leads to better health outcomes and school performance for children participating in the program.

Indicators of a successful program: One major indicator used to measure progress toward achieving the program objectives for the adults/parents is improved and consistent employment and income. Adults participating in the program who do not have full-time employment are asked to participate in a 16 session employment program called Jobs for Life with the goal of attaining full-time employment. A second indicator used to measure progress toward achieving program objectives is families remain engaged with their Support Circle members on a regular basis and that they work together to achieve the objectives established in the covenant that the family and Support Circle sign at the beginning of their involvement with the program. This covenant is tailored to the needs and goals of each participating family and includes objectives such as attaining a certain type of certification for work, improving ones education, paying off debts, learning how to budget, securing better employment, obtaining medical and/or dental care for family members on a regular basis, etc.

If City funding is denied: The City’s funding for this program is the cornerstone of the program’s success. Every dollar the City gives for the rental subsidy portion of the program is matched with a dollar from the sponsoring congregations and another dollar from funds raised by Catholic Charities. The clients we serve are families who are underemployed at the time they enter the program and are homeless because they simply do not make enough money to afford rent. Thus, the rental subsidy is critically needed to enable these families to move out of the homeless shelters which refer them to the Support Circle program. One of the keys to Catholic Charities’ ability to get foundations and private donors and the congregations to commit their portion of the rental subsidy is to show them the City’s commitment to contributing to the alleviation of the homelessness of the families served in the program. Without the rental subsidy these families would not be able to get out of the homeless shelter and get back on the path to stabilizing their family. And the shelters would be unable to admit more people who are presently living in hotels, cars and on the streets. If the City did not provide funding for 1/3rd of the rental subsidy, it is likely that the program would no longer be able to function. This program is a great example of what can be accomplished through a partnership between the City, the County, the faith community and the private community of businesses, foundations and individual donors and the City should be commended for the leadership role that it has played in this program from its inception.

Service Output & Outcome Measures

Outputs	FY16 Target
# of Support Circles recruited and trained in the fiscal year	15
Provide permanent housing to families living in homeless shelters in the fiscal year	15
# of adults and children in the participating families receiving case management services in the fiscal year	80
Provide support to all Support Circles active during the fiscal year	25
Outcome Measures	FY16 Target
# of people who will move into permanent housing in fiscal year	40
Percent of families who maintain their permanent housing for a minimum of 12 months	80%
Percent of households paying less than 40% of their income for rent at the completion of the Support Circle Program	90%



FY16 Other Outside Agency Funding Request Greater Raleigh Chamber of Commerce – Edge 5

Funding Summary – *The Chamber of Commerce requests \$200,000 for in support of the Edge 5 program.*

FY16 City Funding Requested	FY15 City Funding Received	FY16 Agency Total Budget	FY14 Total Actuals	Request As % of FY14 Actuals (25% Policy)
\$200,000	\$170,000	\$2,084,031	\$7,130,407	2.8%

Applicant-Provided Information:

Agency and Program Description

To recruit and retain jobs and increase the tax base of Wake County through proactive business recruitment, retention and expansion strategies. To serve as the primary marketing and prospect handling organization for Wake County and to offer economic development support to the County’s twelve municipalities. To focus on talent recruitment and retention through talent development partnerships, the Work in the Triangle Initiative, and customized talent recruitment strategies for companies as we seek to create an environment in which Wake County businesses can grow and thrive.

EDGE 5 – The Leading Edge is a five-year regional community and economic development plan, supported by private sector investment in partnership with Wake County and the City of Raleigh. The plan aims to directly create 25,000 net new jobs with a total impact of 64,500 in Wake County. 100,000 new jobs in the region, and an increase Wake County labor force by 12% or 61,064 new workers, with special emphasis in target industry sectors including Manufacturing, Information, Professional and Business Services and Financial Activities.

The program will accomplish this through 5 pillars:

1. Regional Competitiveness and Cooperation - Support the Research Triangle Regional Partnership’s economic development strategy to attract jobs and investment to the region.
2. Marketing/PR, New Business Attraction & Job Creation - Attract new jobs and investment to Raleigh and Wake County.
3. Existing Industry Support, Innovation & Entrepreneurship - Promote the expansion and retention of existing industries in Wake County. Provide support for entrepreneurship and innovation in targeted industry clusters.
4. Talent Attraction & Development - Expand the number of highly skilled employees for existing and new companies in Wake County that are necessary for companies to meet their competitive needs, grow locally and compete globally.
5. Quality of Place and Sustainability - Develop and support local, regional and statewide policies that address our growing population, retention of workforce talent and high quality of life.

Highlights of Agency Funding Request

Short/Long term benefits to public: Job creation for our citizens and investment in our community are both the short term and long term benefits we are trying to achieve. By recruiting high paying jobs as well as jobs that support all skill levels we are helping build the capacity of our citizens and our community while also elevating the profile of Raleigh nationally and internationally both to companies and talented individuals who may want to live in Raleigh.

Indicators of a successful program: We track job creation, investment, success in job creation in target markets, public relations efforts and story placement through efforts, social media metrics, as well as the direct, indirect and induced benefits of the jobs created through our efforts in collaboration with the city. These provide clear benchmarking data to track success.

If City funding is denied: We will not move forward with key initiatives such as the public relations and marketing efforts to promote the City of Raleigh. We would also scale back our target industry cluster marketing specific to Raleigh and recruitment efforts, as well as our site selection consultant cultivation efforts.

Service Output & Outcome Measures

Outputs	FY16 Target
Secure Media Outlets	8-10
Host Site Selection Consultants in Raleigh	6-8
Site Selection Consultant Visits representing Raleigh	4-6
Outcome Measures	FY16 Target
Job creation in target clusters	60%
National media stories featuring Raleigh	6-8
Project RFI and Visits and Existing Industry assistance with projects considering expansion in Raleigh	Monthly



FY16 Other Outside Agency Funding Request DHIC, Inc.

Funding Summary - DHIC requests \$108,000 for general operating support (salaries and benefits) of its programs.

FY16 City Funding Requested	FY15 City Funding Received	FY16 Agency Total Budget	FY14 Total Actuals	Request as % of FY14 Actuals (25% Policy)
\$108,000	\$108,000	\$2,077,000	\$1,965,281	5.5%

Applicant-Provided Information:

Agency and Program Description

For the past 40 years, DHIC has been a partner with the City of Raleigh helping to assist lower income seniors, families and individuals secure safe, affordable and stable housing. We not only build affordable rental homes and homes for purchase, but we also provide valuable support services to help our residents build wealth, maintain healthy lifestyles and provide our youth with educational and recreational opportunities.

Highlights of Agency Funding Request

Short/Long term benefits to public: Safe stable affordable housing is the building block for families and individuals to grow and prosper. Numerous studies indicate that academic achievement of youth is at-risk if stable housing is not part of the equation. Neighborhoods thrive and are strengthened when quality and safe housing is maintained and when residents are engaged in empowering activities. Limited public resources can be saved or reallocated when seniors, who live on modest and fixed incomes, can continue to live independently instead of prematurely moving into costly nursing homes.

Indicators of a successful program:

- The number of housing units that DHIC advances or maintains as affordable in the Raleigh market.
- The overall vacancy rate at DHIC properties, coupled with the number of individuals served.
- The number of residents participating in resident services programs

If City funding is denied: If City funding is denied, DHIC would be hampered in its efforts to maintain the current quality and level of programming and services, especially in the area of homebuyer education, pre- and post-purchase counseling, and resident services programming. To scale back on services would mean the delivery of fewer workshop classes and counseling hours, as well as fewer direct-service hours to aid seniors and families living on very modest incomes. Additionally, when applying for foundation grants, the support of the City helps to strengthen our application by showing local support for our work.

Service Output & Outcome Measures

Outputs	FY16 Target
Provide safe affordable rental apartment homes for Raleigh residents	1254
Complete construction of new townhomes in downtown Raleigh	10
Complete construction of new affordable apartment homes on Tryon Road	48
Outcome Measures	FY16 Target
Increase Raleigh's tax base (measured in \$ of valuation)	\$4M
Provide rent savings to residents of DHIC's 1258 apartments in Raleigh (measured in annual rent savings)	\$5M
Provide resident services programs and activities designed to promote healthy living, youth enrichment, resident engagement, financial stability and seniors well-being.	300



FY16 Other Outside Agency Funding Request Downtown Raleigh Alliance

Funding Summary – *Downtown Raleigh Alliance requests \$114,855 to provide operating and program support, targeted in particular toward its retail recruitment program.*

FY16 City Funding Requested	FY15 City Funding Received	FY16 Agency Total Budget	FY14 Total Actuals	Request as % of FY14 Actuals (25% Policy)
\$114,855	\$108,450	\$2,193,975	\$2,535,165	4.5%

Downtown Municipal Service District Funding

FY16 MSD Projected	FY15 MSD Adopted	FY14 MSD Adopted
\$1,282,250	\$1,210,000	\$1,199,700

Applicant-Provided Information:

Agency and Program Description

In 1996, DRA was created to partner with the City of Raleigh in revitalizing its declining downtown. The funds from this grant would be applied towards community and economic development purposes, with emphasis on revitalizing and promoting the retail and storefront economy in downtown.

Highlights of Agency Funding Request

Short/Long term benefits to public: The public will enjoy the benefits of more shopping options in downtown.

Indicators of a successful program: Fewer vacancies and number of new business openings.

If City funding is denied: A full time personnel dedicated to retail recruitment could be eliminated. And the funds dedicated to promoting downtown as a retail destination could be cut. And the agency's relationship with the City of Raleigh would be damaged.

Service Output & Outcome Measures

Outputs	FY16 Target
Number of requests for information from retail brokers and prospective retailers	30 or more
Number of website hits in business section of website	60,000
Number of attendees at State of Downtown event	400 or more
Outcome Measures	FY16 Target
Number of vacant storefronts filled with new businesses	10 or more
Number of new storefront business openings	20 or more



FY16 Other Outside Agency Funding Request Hillsborough Street Community Services Corporation

Funding Summary – *The Hillsborough Street Community Services Corporation requests \$132,500 for operating support (salaries); support of the operation and maintenance of streetlights within the new construction area of the Municipal Service District; and program support for cleaning services (including trash and leaf removal).*

FY16 City Funding Requested	FY15 City Funding Received	FY16 Agency Total Budget	FY14 Total Actuals	Request as % of FY14 Actuals (25% Policy)
\$132,500	\$131,000	\$492,700	\$446,154	29.7%

Hillsborough Street Municipal Service District Funding

FY16 MSD Projected	FY15 MSD Adopted	FY14 MSD Adopted
\$280,000	\$267,000	\$191,700

Applicant-Provided Information:

Agency and Program Description

The Hillsborough Street Community Services Corporation is the city-assigned manager of the Municipal Service District created by the City of Raleigh for Hillsborough Street.

Highlights of Agency Funding Request

Short/Long term benefits to public: We are trying to help make Hillsborough Street a distinct destination in Raleigh. We want it to be a welcoming, safe and attractive place to visit, do business and live, work and play.

Indicators of a successful program: We hope to reduce the number of vacant retail locations, improve the mix of different kinds of business, increase foot traffic and repeat customers.

If City funding is denied: If funds are denied, we will lose the matching \$100,000 in funding from NC State that is committed as a match to the city’s continued funding. The loss of both sources of revenues equals about 45% of our budget and would require dramatic cuts to nearly all our projects and activities.

Service Output & Outcome Measures

Outputs	FY16 Target
Host merchant meetings to engage with the merchants and their staff	6
Host art committee meetings and art event to promote the street as a destination for the arts community	5
To clean and maintain the public space consistently throughout the year	N/A

Outcomes	FY16 Target
Increase foot traffic and repeat customers	N/A
To attract new businesses to Hillsborough Street and eliminate vacant retail spaces	N/A
Help communicate with the public events, activities and public information about Hillsborough St and its merchants and organizations using an engaging website and active social media platform	



FY16 Other Outside Agency Funding Request Joel Lane Museum House, Inc.

Funding Request Summary – The Joel Lane Museum House, Inc. requests \$11,646 to replace the rear part of the roof of Joel Lane’s home.

FY16 City Funding Requested	FY15 City Funding Received	FY16 Agency Total Budget	FY14 Total Actuals	Request as % of FY14 Actuals (25% Policy)
\$11,646	\$0	\$130,250	\$128,581	9.1%

Applicant-Provided Information:

Agency and Program Description

Joel Lane’s house, the oldest one in Wake County, was built circa 1770. It is called the “Birthplace of Raleigh” because it was here that six commissioners met and stayed for two weeks in 1792 while they deliberated over which tract of land to purchase for the location of the new state capital. Joel Lane was a colonel in the North Carolina colonial militia and a patriot during the Revolutionary War. He was instrumental in the creation of Wake County in 1771, and in 1792, he sold 1,000 acres for the present location of North Carolina’s capital city. His faithfully-restored historic home was once deemed “The Best House for 100 Miles.” The historic site includes Lane’s manor plantation house, a circa 1790 middle class dwelling, and a circa 1840 Visitors Center where tours begin. It is open to the public four days a week.

The Joel Lane Museum House, Inc. is a 501(c)(3) charitable organization whose mission is to bring American history to life by providing a rich understanding of regional North Carolina history and the struggles, sacrifices, and achievements of those who lived in Piedmont North Carolina in the 18th century, with particular emphasis on the life and times of Colonel Joel Lane, his family, and enslaved workers. The Board of Directors is responsible for the financial support and operation of the Museum. The balance of the operation is funded through donations, proceeds from events, and grants. It is operated by a very small paid staff (1.5 FTE) and many loyal volunteers.

Highlights of Agency Funding Request

Short/Long term benefits to public: In the long-term, the benefits of a well-educated citizenry are legion. When visitors come to the Joel Lane House and learn of the struggles their ancestors went through to provide the freedoms we as Americans take for granted every day, freedoms that are extremely rare in today’s world, then they are motivated to be good stewards of our shared government and the responsibilities bestowed on us as citizens of a free country. In the short term, visitors leave here with a better appreciation of the modern conveniences we use every day that were not available to those who lived in Joel Lane’s time. They better understand the hardships that those who lived in the 18th century had to endure just to survive.

Indicators of a successful program: Measures of success include the number of people who come to the site or whom we touch in other ways, the amount of money we raise each year, and an intangible measure: what visitors tell us or write to us after their time spent on the property, that it was a meaningful experience.

If City funding is denied: If funding is denied, then we will have to wait several more years before the roof can be replaced. Leaks may appear that could cause damage to the 240-year-old timbers in the house or its plaster and paint finishes. The longer we put off the work, the more expensive it will become. To be historically accurate, the roof must be clad in hand trimmed cedar shakes of a certain size and shape. The front portion of the roof of Joel Lane's house was last replaced in 1992, and the rear was replaced in 1998. In 2013, it was clear that the time for replacement had arrived again. Many individual shakes were splintered into many pieces, and the overall condition was not good. We had repaired replaced one small section that was actually leaking, but it was clear more needed to be done. Knowing we couldn't afford to replace the entire roof at one time, we thought we should replace the older portion of the roof first, the rear planes. We received an estimate from Baker Roofing in April 2014 to replace the rear part for \$11,646. (The rear has a lower slope which causes water to collect more than it would if it had a steeper slope. That's the way Joel Lane built it, so that's the way it must stay.) On closer inspection, we realized that the front portion, though newer, was in worse shape than the rear. The front portion faces south and receives much more sun and weather than the rear. We approached the NSCDA in NC for additional funding, of which they provided \$7,000 towards the total cost of \$14,000. As the NSCDA in NC is responsible for two other much larger and more expensive historic homes, Haywood Hall here in Raleigh and Burgwin Wright House in Wilmington, which also have great repair needs, we do not foresee that they will be able to provide funding for the remainder of the roof replacement anytime soon.



FY16 Other Outside Agency Funding Request Marbles Kids Museum

Funding Summary – *Marbles Kids Museum requests \$25,000 to fund a portion of the Marbles Museum Master Planning consultant fees.*

FY16 City Funding Requested	FY15 City Funding Received	FY16 Agency Total Budget	FY14 Total Actuals	Request as % of FY14 Actuals (25% Policy)
\$25,000	\$0	\$6,461,000	\$6,011,493	0.4%

**Please Note: Marbles Kids Museum received an arts agency grant in FY15 and has requested funding through the arts agency grant process for FY16.*

Applicant-Provided Information:

Agency and Program Description

Located in the heart of downtown Raleigh, Marbles Kids Museum serves children, families and school groups with award-winning, play-based exhibits and daily programs, summer camps, IMAX educational and feature films, parent-child workshops, field trips and special events. The Marbles campus includes a children's museum, café, multiple outdoor courtyards, and the only giant screen 3D IMAX Theatre in North Carolina. Marbles ranks among NC's top 10 attractions, having quickly grown in popularity since opening in 2007 to welcoming more than 650,000 visitors in 2014.

Program Description: Marbles Kids Museum is embarking on the development of a 10-year Master Plan to guide future growth and expansion of the museum's downtown Raleigh campus, building our capacity to positively impact the quality of life and learning in Raleigh and Wake County. Marbles respectfully requests \$25,000 from the city of Raleigh to fund a portion of the Master Planning consultant fees.

With colorful, hands-on exhibits, creative programming and a welcoming approach, Marbles Kids Museum quickly exceeded initial visitation projections following our 2007 opening. In just 7 years, the museum has attracted more than 3.8 million visitors to downtown Raleigh. Due to the rapid transformation and growth at Marbles, the museum has not yet developed a comprehensive and integrated facilities master plan. Given the current revitalization of downtown Raleigh, now is a prime time for Marbles to examine the needs of our visitors, the future of our organization and our role in serving this community.

Leveraging and integrating the Downtown Raleigh 2025 plan and the plan for the renovation of Moore Square Park will be important to a successful Master Plan for Marbles Kids Museum. Thus, Marbles Kids Museum will work with a consultant to develop the Master Plan that engages stakeholders and community members and provides a roadmap for future growth and expansion in downtown Raleigh.

Highlights of Agency Funding Request

Short/Long term benefits to public:

- Improved visitor flow through better use of current space
- Increased capacity to meet public demand for programs and services through creative space use and immediately actionable expansion or renovation projects
- Expansion of exhibit space to serve more visitors and enhance learning experiences
- Enhanced museum exterior that serves as a public greenspace, active bike/ped corridor and downtown Raleigh landmark for residents and visitors alike
- Extension of outreach efforts on and offsite at Marbles to fully engage ALL families with young children in Raleigh and Wake County

Indicators of a successful program: The predominant indication of success will be the creation of a final plan and implementation strategies. Using information and analysis from stakeholder visioning, field benchmarking and additional data collection, the consultant will proceed with the completion of a Master Plan to guide the future growth of Marbles Kids Museum, as well as suggested implementation strategies to facilitate future funding and feasibility discussions.

The key desired output is a cohesive yet flexible 10-year Master Plan to guide future facilities growth and expansion at the museum’s downtown Raleigh campus in a manner that reflects our vibrancy and expands our capacity to serve the needs and interests of the community.

If City funding is denied: Marbles Kids Museum believes that funding from the City of Raleigh is important to support the many ways our museum enriches the lives of Raleigh residents, improves the livability of downtown, and contributes to the economic vitality of our region. Support from the City of Raleigh will also ensure that the Marbles Master Plan adequately leverages and links to the recently completed Downtown Raleigh 2025 Vision and the construction of Moore Square Park. If City funding is denied, the potential of the Marbles plan to reinforce and extend the City’s related investments will be diminished and the City’s related planning goals will be compromised.

Service Output & Outcome Measures

Outputs	FY16 Target
10 Year Comprehensive Master Plan	N/A
Outcome Measures	FY16 Target
Engage a variety of stakeholders to provide input during the planning process	N/A
Collect information to identify opportunities, themes and limitations	N/A
Create a vision for Marbles to expand its positive contribution to the quality of life and learning in Raleigh and Wake County	N/A



FY16 Other Outside Agency Funding Request Nessie Foundation, Inc.

Funding Summary – *The Nessie Foundation requests \$237,000 to support construction of a community safe room.*

FY16 City Funding Requested	FY15 City Funding Received*	FY16 Agency Total Budget	Total FY14 Actuals	Request as % of FY14 Actuals (25% Policy)
\$237,000	\$0	\$1,543,260	\$51,030	464.4%

**Please Note: Nessie Foundation received a human service agency grant in FY15 and has requested funding through the human services grant process for FY16.*

Applicant-Provided Information:

Agency and Program Description

Nessie Foundation Program: Dual Purpose Community Safe Room

Highlights of Agency Funding Request

Short/Long Term Benefits to Public: The Community Safe Room has a building life over 50 years and is virtually maintenance free. This will be a true long-term asset to the community. The building's primary function and benefit will be to protect the surrounding residents who live in manufactured housing from the horrific destruction of a tornado. It's designed to FEMA standards to withstand over 200 mph winds which would be a EF5 tornado.

The added benefit to the safe room is that it will serve as a community center and will be the point for non-profits and agencies to deliver much needed services and programs. The building will be a place where the City and others can have public events and public agencies can reach out and bring services to the Southeast Raleigh community. Health Fairs, ESL classes, Tutoring, Reading and Homework Labs, Cooking Classes and Art and Crafts Classes are just some of the possibilities at the center.

The safe room will be located within an existing community that is home to over 400 kids ages 18 and under. Most households have incomes that are 60% or below the AMI for Raleigh and the community has numerous single parent households. The community is not on the bus line and there are not any parks or grocery stores within safe walking distance. These factors contribute to the community being underserved and the youth being identified as "at risk". Without the community center and programs that it facilitates, the youth and families of the community will have few positive outlets in the community and will certainly have few supervised and structured activities. This building will a safe place that will have the support system to give youth a greater chance to make positive choices.

For the kids we want to introduce them to structured after school programs. Some of the benefits we hope to achieve are:

1. Reduction of negative behaviors
2. Increase school engagement and performance
3. Increase knowledge and participation in nutritious eating and healthy habits that will enrich their life
4. Foster positive relationships with peers, family and mentors

For young adults and adults we would provide programming to engage them and help him reach goals in life. Specifically, we would like to achieve the following:

1. Increase adult education, career advancement and communication skills - English as Second Language (ESL); Computer Program classes; resume writing classes, etc.
2. Increase financial literacy - basic financial/banking classes; credit classes; tax help
3. Cooking classes - healthy eating and menu preparation; grocery shopping basics; family cooking basics

We would like to create a true community - a place where they can feel safe and be proud to tell others where they live. We want them to participate in programs and to use and ask for services that will help them be more stable and achieve their goals. We want them to think of the community has more than a place just to live and sleep but a place where they can grow and thrive. This building and the services that it will bring will set the foundation for what we are striving to achieve.

Indicators of a successful program: Once the building is complete we would like to several indicators of success - such as:

1. During severe weather/tornado warning - residents are utilizing the building as intended
2. A variety of partners are engaged in numerous programs to offer the underserved
3. The center become the vibrant focal point for the community and others come to us for assistance in setting up programs to help their communities

If City funding is denied: If funds are denied, we will be short 15% of the funds necessary to complete the project. If other funding could not be found to replace the funds request from the City, then the project will not move forward and the safe room will not be constructed.

The funds have an expiration date that requires us to complete construction by August 2017. Funds and pledges need to be in place by spring 2016. This will allow us to secure the bridge loan and to have enough time to construct the building.

Service Output & Outcome Measures

Outputs	FY16 Target
Participation in youth and adult programs at community safe room	100
Interactions with participants per month	640



FY16 Other Outside Agency Funding Request Passage Home, Inc.

Funding Summary – *Passage Home requests \$100,000 for general operating support (salaries/benefits) of its programs.*

FY16 City Funding Requested	FY15 City Funding Received	FY16 Agency Total Budget	FY14 Total Actuals	Request as % of FY14 Actuals (25% Policy)
\$100,000	\$90,000	\$3,649,364	\$3,436,188	2.9%

Applicant-Provided Information:

Agency and Program Description

Passage Home is a community development corporation founded in 1991 serving Raleigh and Wake County, with special emphasis on neighborhood development, affordable housing, and services to assist those who are homeless, living at and below poverty and veterans.

Highlights of Agency Funding Request

Short/Long term benefits to public: Passage Home has been able to identify the generally accepted causes of poverty to continue to update our data by being aware of community hearings, local committees, stakeholder meetings, town hall sessions, street canvassing, surveys, individual case worker evaluations, community center and county wide events, webinars, partnership initiatives and walk-ins to our main office, safety club and thrift store. The identified causes of poverty are lack of education, unemployment, shortage of affordable housing, inadequate income, prison re-entry obstacles, affordable and available childcare, disability and poor health, recession, depressed earnings, lack of finance basics and women who have experienced violence.

This project leverages Passage Home's new commercial kitchen to meet the health and economic development needs of Raleigh's low- to moderate-income (LMI) residents. This project aims to empower residents living in this target area with the knowledge and skills to provide a healthy life for themselves and their families, and to become parts of a growing, resilient and viable community

We also recognize that there are structural causes to poverty that require policy change at the governmental level such as minimum wage policies, affordable housing and housing subsidy policy, food stamps and public health initiatives; these policies are outside of the purview of this grant. As such, we assist our clients and residents living in poverty to use all the resources available to address the limitations in their own lives and make the changes they can, over which they may have control, in order to overcome poverty and to improve their own circumstances. It is for this reason that our mission is to reduce and break the cycle of poverty among families we serve. Therefore we provide outreach and intake to families whom are identified as in need, and those who seek to make the changes necessary that will help themselves to become more economically self-sufficient.

We were able to determine priority strategies to be expanded upon and new ones implemented through information garnered from multiple sources. We seek and use information that has been documented in the neighborhood plans, by working with the Wake County Human Services department, especially with regard to the county's own statistical data and needs assessments to understand homelessness, youth needs' assessment, working with other non-profit organizations, including partners like Ship of Zion Outreach Center, JD Lewis Center, the Poe Health Center, Salvation Army, Step-Up, Green Chair, Wheels 4 Hope, Interact, Triangle Family Services, South Light, Healing Place and the Partnership to End Homelessness.

Indicators of a successful program:

- financial records reflect individual's income has increased over the poverty guideline
- certification of completion from educational training classes
- report cards collected that show promotion to the next grade
- individuals maintaining financial stability for at least 6 months or more
- youth grades improve or remain consistent for each marking period

If City funding is denied: While Passage Home has been successful in securing program related restricted funding, the loss of this grant if denied, would have an adverse impact on our immediate operations requiring Passage Home to replace this funding in the short run. If we cannot replace these funds with unrestricted funding, we would have to reduce some of the services provided due to lack of support manpower to process the various claims and services for clients. We have and are making provisions to support our operations for the future and the timeliness of receipt for this continued funding is critical at this time.

Service Output & Outcome Measures

Outputs	FY16 Target
Number of individuals enrolled into anti-poverty program.	200
Number of enrolled Youth ages 5-18 receiving get promoted to next grade.	40
Number of people that participate in job training and educational placement programs.	5
Outcome Measures	FY16 Target
Individuals complete goals within the anti-poverty program	90
Youth between the ages of 5-18 are exposed to cultural, enrichment programs and get promoted to the next grade.	40
Participants complete job training program	5



FY16 Other Outside Agency Funding Request Raleigh Area Development Authority, Inc.

Funding Summary – *Raleigh Area Development Authority requests \$113,845 for operating support of housing counseling services.*

FY16 City Funding Requested	FY15 City Funding Received	FY16 Agency Total Budget	FY14 Total Actuals	Request as % of FY14 Actuals (25% Policy)
\$133,845	\$0	\$394,020	\$609,277	22%

Applicant-Provided Information:

Agency and Program Description

The Raleigh Area Development Authority (RADA) is a 501 C(3) not for profit community economic development organization. Founded to provide financial and counseling assistance to low and moderate income residents of the City of Raleigh, North Carolina, RADA has been designated a HUD Housing Counseling Agency by the U S Department of Housing and Urban Development (HUD), and, an Emerging Community Development Financial Institution (CDFI) by the U S Department of the Treasury. Counseling programs are organized within the RADA Consumer Counseling Center. This Center provides a comprehensive range of programs, including credit building, and home ownership preservation.

Highlights of Agency Funding Request

Short/Long Term Benefits to Public: Homeownership Preservation; every mortgage saved preserves not only the owner's equity, but also family quality of life, and City tax base.

Indicators of a successful program: Foreclosures Prevented & Homes Saved; as a HUD and NCHFA counseling partner, RADA maintains accurate data regarding the impact of our services and will provide related reporting to the City as required.

If City funding is denied: If the City of Raleigh does not approve this request, RADA will reduce its counseling staff and outreach activities. As a result, many Raleigh residents will be unaware of our services and have a high likelihood of being foreclosed upon by their lenders or loan servicing agency.

Service Output & Outcome Measures

Outputs	FY16 Target
Foreclosure Prevention	539
Outcome Measures	
Homes Saved	196

RADA - Consumer Counseling Services

City of Raleigh Funding Request (Narrative)

Despite the continued threat of foreclosure and other causes of loss of home ownership, Federal funding available to support RADA's related counseling services is declining. This request from the City of Raleigh for fiscal year 2015-2016 general organization financial support will help sustain RADA's ability to effectively meet the needs of Raleigh residents for foreclosure prevention & default resolution counseling services.

Statement of Need

RealtyTrac, the nation's leading source for comprehensive housing data reports that a total of 55,906 U.S. properties started the foreclosure process in November of 2014. The report indicates that while this is a decrease of 1 percent from the previous month it is a 6 percent increase from a year ago, the first year-over-year increase following 27 consecutive months of year-over-year decreases. Because of the continued non-response from servicers and mixed messages that are communicated to struggling homeowners, the need is still great for the housing counseling services provided by RADA.

One of the biggest challenges of foreclosure prevention efforts continues to be the inability of loan servicing organizations to engage homeowners in meaningful loss mitigation efforts that will result in a favorable resolution and help homeowners avoid foreclosure. We have found that servicers often provide inconsistent and confusing information to homeowners during the process. This poor customer service delivery can result in long delays in the modification process and can leave struggling homeowners frustrated and distressed.

RADA provides hope for affected Raleigh residents by offering one-on-one counseling designed to help them resolve mortgage delinquency and or prevent foreclosure. In RADA's service delivery model, there are two key components -- intake and counseling.

These two processes consist of many details that are performed on a daily basis by our trained and experienced staff. For example, our intake personnel received on average 425 calls per month during 2014. For each call that comes in the intake staff person must complete a 'triage' assessment as well as a preliminary budget.

Additionally, our counseling staff provided services to 675 homeowners in 2014. In this group's service delivery model, for each client team members are responsible for:

- Conducting a thorough financial analysis to assess each client's ability to maintain the mortgage
- Budget counseling to reduce the risk of future mortgage delinquency issues

- Development of an action plan
- Submission of a complete and accurate loss mitigation packet to the servicer on the client's behalf.

If approved, the requested City of Raleigh funding would enable RADA to continue to offer quality foreclosure prevention services to Raleigh homeowners.

Funding would also help sustain our vigorous public awareness program. Far too often, consumers learn of our services too late for us to be of assistance. The public information program will heighten awareness amongst the general public regarding our foreclosure prevention and other counseling services.

City of Raleigh funding would also provide increased administrative capacity to support the RADA counseling staff.

Current Capacity:

At current capacity RADA has (4) full time employees, (1) part time employee, and (1) trainee who is currently working with our foreclosure prevention programs. One of RADA's full-time employees is responsible for the program management of the foreclosure program. The program manager has the responsibility for assuring the quality of all housing counseling services, including data input and management.

Three (3) of RADA's full-time employees are foreclosure prevention counselors. And (2) of those are funded by the North Carolina Housing Finance Agency administered Attorney General Settlement program, which will end in June of this year. City funding will contribute to retaining these experienced counselors.

RADA's (1) part time employee currently works as our intake staff member, and is responsible for taking calls and setting appointments. Our weekly call volume consistently exceeds ____.

Finally, our part time trainee works in our office twenty hours per week through a grant funded trainee program and also works as intake support, taking calls and setting appointments for counselors.

Capacity Goal:

RADA's proposed strategy for the City of Raleigh funding is to be able to sustain current staffing while also increasing capacity to help meet the anticipated demand of the coming 2 years, during which we anticipate the demand for these services will substantially diminish.

With City of Raleigh financial support, RADA would be able to retain the (2) full-time counselors that are currently supported by AG Settlement Funding. We would also be

able add a full-time administrative support position. This full-time administrative support position would help to relieve counselors of administrative duties in an effort to free up more of their time to counsel homeowners in need of foreclosure prevention services. The administrative support position would also be able to assist with the daily needed client follow up and file maintenance.

Lastly, in an effort to enhance our public information plan, we would utilize City funding to support outreach and public information distribution.

In summary, our goals for utilizing City of Raleigh funding are to:

1. Retain an excellent team of counselors so that Raleigh residents can continue to receive quality service, and
2. Continue to conduct public outreach activities to ensure that those in need of (and who can benefit from) our services, will know about them and will be able to find us.

RADA Mortgage Refinance Initiative and Funding Request to City of Raleigh

FYI 2015-2016

The 2008 economic crises continues to have its effect on millions of homeowners across the country. By the end of 2008, statistics indicated that almost ten percent of all mortgages in the United States were either delinquent or in foreclosure, according to the Mortgage Bankers Association. Raleigh Authority Development Authority (RADA) has been extremely effective in assisting homeowners in the City of Raleigh to prevent foreclosure and as discussed above, there is still need for assistance.

This proposal is a logical extension of our counseling and foreclosure prevention service, and focuses on those homeowners who successfully received loan modifications with assistance from RADA and other counseling agencies, via the North Carolina Housing Finance Agency Mortgage Payment Program (MPP).

For these homeowners, after the sigh of relief for having saved their homes, soon comes the reality, and stress, that at some point the assistance from NCHFA will end, and regular mortgage payments must be made. Through this initiative, RADA proposes to reach out to these homeowners and begin to work with them to permanently refinance their loans so as to provide long term stability of ownership.

Although federal and state governments adopted programs encouraging lenders to modify troubled mortgages, these efforts failed miserably as they did not stop the avalanche of falling values, succeed in keeping owners in their homes, or stop plunging equity markets.

Even with temporary loan modification relief, many borrowers are suffering severe financial hardship due to job and business loss and still cannot afford the current payment. Industry statistics indicate that within six months, 50 percent of all loan modifications fail to prevent foreclosure. The relief offered by lenders to borrowers in distress is little more than Band-Aid relief instead of what's really needed: reconstructive surgery to remove and replace their loan's toxic terms with terms commensurate with the borrower's ability to repay and proportionate to the home's current true value.

RADA has determined that though it has been instrumental in assisting homeowners who were in emergency crisis status regarding their mortgage, "due to no fault of their own," further assistance is needed in order to help these homeowners become "healthy" as it pertains to their home mortgages.

RADA is in a unique position to assist homeowners in surviving the threat of foreclosure through the NCHFA "Mortgage Payment Program" and desires to further assist these homeowners by refinancing these toxic loans, particularly through the **FHA Streamline Refinance** program, into terms more conducive to the homeowner's long-term success.

Currently, once these homeowners have completed the NCHFA Mortgage Payment Program, they are left subject to once again return to a delinquent or default status

because the same toxic terms that originally caused loan default by the homeowner, are still present.

The good news is that once the homeowner has completed the Mortgage Payment Program, their payment history will normally return to a current status that will qualify this homeowner to be able to refinance their mortgage (particularly if the mortgage is an FHA mortgage), under the FHA Streamline Refinance program, which can permanently lower their mortgage payment.

Because RADA's assistance is currently limited by how we are compensated by NCHFA, we are unable to provide needed counseling to homeowners that would qualify to refinance to lower payments after exiting the Mortgage Payment Program. Without further assistance, homeowners are left to "fin" for themselves, and left exposed to possible re-default.

With the requested funding from the City of Raleigh RADA would be in a very advantageous position to assist these homeowners into permanently lowering their mortgage payments, reduce the exposure to re-default and/or foreclosure, thus further strengthening the local housing market and City economy.

Finally, turning toxic mortgages into "healthy" mortgages creates a win-win for Raleigh, its citizens and other related businesses that rely on a healthy housing market to grow and thrive. And, as is the City's expectation, this funding will also contribute to RADA's own long-term stability in that the lenders we assist by preserving mortgage loan portfolios will pay a fee for our services.

Our goal for this funding is that by the end of the 12 month funding commitment, we will establish relationships with sufficient numbers of lenders and their clients to sustain this program.

RADA hereby requests the following in order to expand its organization's success in the prevention of foreclosures in the City of Raleigh:

\$ 36,000 is needed to compensate an experienced consultant in structuring and assisting RADA in obtaining the necessary approvals RADA will require to become Loan Correspondents for various Lenders. These activities include formulating and developing the infrastructure of the originating department of RADA. These necessary approvals include Housing Urban and Development products such as FHA Streamline Refinances and the Veterans Administration (VA) Refinances. This also includes the training of support staff for the processing of these applications for submission to Lenders.

\$ 5,000 is needed for content development (research and writing), graphics, layout, and printing of materials needed to reach the target market. This would be inclusive of approximately 2 local seminars/workshops for potential applicants.

\$ 6,500 is needed for acquiring the necessary Loan Operating Software additional Filing Systems and Technical Equipment for increased loan application activity.

\$ 3,500 is needed for Continual Educational, Loan Underwriting Update Courses and Loan Processing Updating Courses and related expenses.



FY16 Other Outside Agency Funding Request Rebuilding Together of the Triangle

Funding Summary – *Rebuilding Together requests funding for direct program support (e.g., building materials, skilled labor, etc.).*

FY16 City Funding Requested	FY15 City Funding Received	FY16 Agency Total Budget	FY14 Total Actuals	Request as % of FY14 Actuals (25% Policy)
\$40,000	\$0	\$436,500	\$261,267	15.3%

Applicant-Provided Information:

Agency and Program Description

Rebuilding Together of the Triangle, Inc. (RTT) preserves safe, healthy homes for low-income homeowners in Wake, Durham, Orange and Chatham counties. We achieve this by providing home repairs, accessibility modifications and home performance upgrades to these homeowners, most of whom are elderly, disabled, or both. We mobilize a unique composition of volunteer and contract labor, 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, re-branded 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 continued to expand services since, completing work on 48 projects in 2014. The project coordinator, Dan Sargent, has become the full-time Executive Director, and the organization has added a full-time Program Director and Field Operations Coordinator to the team. During that period, the organization's budget has grown from under \$50,000 in 2009 to a projected \$436,500 in 2015.

Highlights of Agency Funding Request

Short/Long term benefits to public: Our long-term, community-level goal is to play a role in improving public health by making the built environment generally, and homes in particular, safer and healthier places to live. This requires collective action, and is the product of literally dozens of factors, so it is not something we can accomplish alone. However, we can make the individual lives of Raleigh residents healthier and safer in their homes through the work we accomplish. We want people to live in homes that work for them as they age, accommodate their specific health conditions and are healthy places for their children to learn, grow and develop. While we don't affect every parameter necessary to achieve those outcomes, it is impossible to make that type of impact without the work that we do at Rebuilding Together of the Triangle.

Indicators of a successful program: At Rebuilding Together of the Triangle, we have the benefit of being able to evaluate our progress toward these outcomes one project at a time. This gives us a clear sense of where we are in relation to our larger goal on a daily basis, and allows us to learn from project to project how to more effectively and efficiently achieve these outcomes for each homeowner we serve.

If City funding is denied: The program will still operate as intended, however, more homeowners will remain on our 50-family waiting list within the City of Raleigh for another year. Despite expanding the number of homeowners we can serve every year since 2009, our waiting list grown almost weekly. Funding from the city will go directly into these homes in the form of building materials, licensed contractors, and volunteer logistical supplies (portable toilets, dumpsters, etc.) that will restore safe, healthy homes for our vulnerable neighbors across the city.

Service Output & Outcome Measures

Outputs	FY16 Target
Households served with critical home repairs, accessibility modification and home performance upgrades	20
Outcome Measures	FY16 Target
Number of homeowners who have a restored ability to live in their home without exposure to critical health and safety hazards like uncontrolled moisture, electrical shock hazards, major concentrations	20
Percentage of homeowners reporting increase in well-being and/or ability to maintain independence in their home as a result of the services provided.	90%

**2015
BOARD OF DIRECTORS**

January 12, 2015

2015-2016 Outside Agency Funding Application
City of Raleigh

CHAIRPERSON
Tim Spence

Dear Ms. Crouse,

TREASURER
Jim Caravello

Thank you for your consideration of Rebuilding Together of the Triangle's funding application for the 2015-2016 Outside Agency Funding opportunity. Our application, along with the requested attachments, is included in this package. In addition, I wanted to highlight a couple significant items to aid in the evaluation and consideration of our funding proposal.

VICE CHAIRPERSON
Asa Fleming

SECRETARY
Ron Cohn

Fiscal Year

Rebuilding Together of the Triangle operates on a calendar fiscal year. Because of the timing of this submittal, we are still in the process of closing out our 2014 fiscal year, so expense and revenue numbers, while close, should be evaluated as estimates. We will be compiling financial statements and an audit of our 2014 year by July 1, and will happily submit those documents to the city as part of the assessment process as soon as they are complete. For ease of understanding, in the agency and program budget sections, we have included our 2013 final numbers, our 2014 projected finish, and our anticipated revenue and expenses from the 2015 calendar year.

Barry Buckman
Evelyn Contre
Jimmy Eyerman
Lauren Joyce
Todd Jones
Frank Panna
Brian O'Haver
Brandon Moorefield
Paul Sullivan
Henry Ward
Tim Wilson

Additional Budget Detail

Because of the direct service nature of our work, the vast majority of our expenses fell into the 'Other' category on the budget sheet provided by the application. In an effort to clarify those expenses and their purpose, we have assembled the chart below to identify with more clarity what those expenses entail. We are more than happy to provide additional information to aid in the evaluation process if desired, so feel free to contact Dan Sargent with any questions or requests for information.

EXECUTIVE DIRECTOR
Dan Sargent

	2013 Actual	2014 Projected	2015 Budget
Insurance	3,405.57	5,612.71	6,750
Rebuilding Together National Dues	8,847.00	11,650	14,100
Professional Services	1,800	2,300	6,000
Reserves	0	0	30,343.25
Direct Project Expenses (Building materials, skilled labor, waste disposal, etc)	142,363.55	149,866.85	181,500
Total "Other"	156,416.12	169,429.56	238,693.25

Service Area

Our Safe & Healthy Home Repair program serves homeowners across Wake, Orange, Durham and Chatham counties. However, we want to be clear that the program budget outlined in this proposal, as well as any funds awarded by the city of Raleigh, will be spent exclusively to serve residents of the City. We work with funding sources from several of the counties and cities that are located in our service area, and it is important to us that the funds committed by these jurisdictions benefit the residents whom they serve. If awarded, any funds from the City would be applied to direct program costs associated with providing these services to City of Raleigh residents.

Thank you again for your consideration of our proposal. Please feel free to direct any questions or clarifications to Dan Sargent, Executive Director at (919) 996-0999 or Daniel.sargent@rebuildingtogethertriangle.org.

Warm Regards,

Dan Sargent, Executive Director



FY16 Other Outside Agency Funding Request Southeast Raleigh Assembly, Inc. (SERA, Inc.)

Funding Summary – SERA requests \$207,000 for general operating and program support.

FY16 City Funding Request	FY15 City Funding Received	FY16 Agency Total Budget	FY14 Total Actuals	Request as % of FY14 Actuals (25% Policy)
\$207,000	\$207,000	\$219,761	\$215,766	95.9%

Applicant-Provided Information:

Agency and Program Description

Southeast Raleigh Assembly Inc. is a community and individual economic development and capacity building organization, focusing on individual and community capacity building, business and equity development, youth training/education and empowerment, public safety, corporation partnerships, enhanced health and wellbeing, quality housing & transportation advocacy.

Highlights of Agency Funding Request

Short/Long Term Benefits to Public: The expectations for participants over the long term is that they leave the program feeling empowered with a sense of awareness they did not previously have or perhaps an enhanced awareness of their ability to take on whatever issues lead them to the workshop/training. They will also have a heightened awareness of community resources available to them, and an understanding that SERA acts as a hand up to SER residents who are not expecting a handout but rather as a strategic partner to those who want to experience economic independence and an increased quality of life. The long term goal is that participant’s ability to be self-sustaining in their changes do not decline but rather improve. We have an open door policy with all of our program participants. After participants have completed a particular program, they understand they are only a phone call, email or meeting away from support and/or coaching as needed.

Indicators of a successful program: Bench mark data that can be compared and contrasted to post surveys and results from the longitudinal studies will demonstrate the success of the program intervention. Additionally, in an effort to ensure our programs are timely and relevant, SERA is committed to outcome hierarchies which ultimately provide a clear description of a program’s change strategy and sharpens the definition of the scope of any change that may be needed, a problem or opportunity the program should address, the program theory rationale and the factors that may affect the ability of the program to attain the intended outcomes. This is done in order to effectively make changes to programs or services that may not be working to reach their goals as intended.

Service Output/Outcome Measures

Outputs/Outcomes	FY16 Target
Establish nuanced outcomes for every workshop or training	
Provide a clear description of a program's change strategy and sharpen the definition of the scope	

January 9, 2015

To the Members of Raleigh City Council, City of Raleigh Mayor and Raleigh City Manager:

SERA, Inc. is applying for the amount of \$207,000, which we previously received in fiscal year 2014-2015 and preceding years. We are asking for special consideration of our request for the following reasons:

- SERA, Inc. is the only non-profit of its kind in Southeast Raleigh (SER), serving disenfranchised and marginalized communities (primarily low wealth minorities) by providing holistic approaches to individual and community-based economic development via hard skill building services.
- We serve as a conduit for community and corporate linkages and networking within SER through our partnerships and connections with area corporations.
- We are creating, in partnership with Fertile Ground Food Cooperative, opportunities for residents who are interested in becoming cooperative business owners in the first food cooperative of its kind in SER.
- We provide SER youth with opportunities to apply for college scholarships up to \$2,500.00, technology entrepreneurship education and equipment, with assistance from our partner and funder, the Perlman Foundation as well as assistance from our Partner, Teaming 4 Technology.
- We provide over 3,000 online courses to assist adults and high school youth in employment readiness or employment skill enhancement, with support from our corporate partner Alphanumeric.
- We are committed to working with senior citizens to develop a sense of empowerment and diminish fear around technology and we accomplish this by providing workshops specifically for seniors which address intricacies of social media, navigation of the internet, and the entire Microsoft Software Suite.
- We provide needs assessments, resources and coaching for those trying to create small businesses within SER.
- We provide at little or no cost to residents, services that would otherwise cost them \$1,500-\$5,000 relative to improving health outcomes. Through our award winning integrative health programs, we work to ensure that health and wellness which is essential to optimal living and creates opportunity for economic viability, is a value that is recognized, promoted and institutionalized throughout SER.
- SERA, Inc. facilitates award winning anti bullying, peacemaking and mediation programs for middle school and high school youth in order to reduce community and school violence.

- SERA assists in the development of youth mentorship opportunities by providing real life employment experiences for our Youth Ambassadors within corporate companies in order to get them ready to successfully engage diverse work environments.
- SERA's Youth Ambassador Program grow youth civic leaders and community change agents through leadership and peacemaking/conflict resolution training and education. These young people have developed a reputation within their communities as supporters of non-violence and create peaceful alternatives to violence through facilitating conflict resolution and peacemaking groups under the mentorship and guidance of SERA staff.
- We offer business networking opportunities, through our Leadership and Sustainability Institute where corporate and non-profit leaders make business presentations to both corporate, non-profit and small business audiences on business development tips and strategies. Within that environment audience members network and connect with one another regarding employment and resource opportunities.
- SERA, provides hands on business education via our Business Masterminds, Business Expo (at Raleigh Fairgrounds) and Business Networking programs in partnership with the Business Alliance of North Carolina.
- We teach community members how to develop sound and practical business plans by providing professional development coaching services designed to assist residents in recognizing their career, personal and professional goals.
- We work to increase participation in our relationship-based consumption program which teaches citizens how to mine their hidden assets, talents and skills within the southeast Raleigh community as it relates to effective bartering and community consumption. Citizens are also taught virtual banking through this program.
- Through our CHOP (Community Home Ownership Program), we provide SER residents opportunities for credit counseling and assist them in getting ready to apply for a mortgage while working with them to repair their credit. We accompany residents once they are credit worthy to their first mortgage meeting with the bank. Our partner in building community wealth by responsible homeownership is North State Bank. As a result of this program our clients are most often enrolled in a mortgage assistance program.
- SERA provides ongoing workshops on financial management and responsibility, banking 101 and credit repair and reporting. Our partner in this endeavor is North State Bank.

- Our community garden assists residents of SER to internalize how to avoid being enslaved by food deserts in their neighborhoods by learning to plant, harvest and cook and eat healthy fruits and vegetables.
- Our office handles over 30 calls a day, 7 days a week. While we do not have a hotline, we return calls each day of the week (including weekends). The calls numbers equate to approximately 7200 a year. Many of those calls turn into face-to-face cases.
- In an effort to ensure our programs are timely and relevant, SERA, Inc. is committed to establishing nuanced outcomes for every workshop or training we conduct. Participants are provided reaction surveys (both pre and post) in order to benchmark and measure whether impacts of change or heightened insight were noted over the course of the program. Additionally SERA is committed to outcome hierarchies which ultimately provide a clear description of a program's change strategy and sharpens the definition of the scope any change that may be needed, problem or opportunity the program should address, the program theory rationale and the factors that may affect the ability of the program to attain the intended outcomes. This is done in order to effectively make changes to programs that may not be working to reach their goals as intended.

Despite the few critics/disgruntled individuals who have not been a part of the work we facilitate on a daily basis, but who choose to disparage what we do as it doesn't fit in with their personal agendas - our work stands for itself. None of the services noted in this letter are new. In fact most of the programming was developed as a result of our participatory action research sessions that took place at City Council Offices when we first became a non-profit. SER residents, leaders and community members described what was needed and through a process of mapping and matrixing we developed a strategic plan that was focused on SER consumer needs as expressed by the overwhelming majority of forum participants over a three month period. 100s of SER residents attended those forums.

We have proven to be excellent stewards of the city of Raleigh's trust and funding over the past 4 years and have served thousands of SER citizens. Without this level of support we would be unable to provide these unique and relevant services to the SER community, as we rely on Council's approval of ongoing funding administered in its current format.

Please understand SERA continues to apply for outside funding. We are blessed to have survived the last few years with the city of Raleigh's support while the economy was in a downturn. We are hopeful that as the economy begins to turn around in the upcoming year, we will begin to build a reserve from outside funders which will buoy us for years to come.

Because we believe the programs and services SERA, Inc. provides are invaluable to the neighborhoods we serve, we have a special request. **We are asking that the city of Raleigh consider taking SERA under its wing as a city division as was done with the Raleigh City Museum, which was formerly a struggling non-profit with the bulk of their budget funded by an agency grant from the Council. This program has since evolved into a City division that is now thriving and doing an even better job of achieving its original mission than it did as a grantee agency. Consideration to that regard would be legitimate and more than likely it would be a viable alternative for SERA, Inc. in its current funding iteration.**

We thank you again for your support and your trust since becoming a non-profit and we would love to have each of you attend our programs and services on a regular basis to see for yourself the radical changes taking place with residents and businesses in SER as a result of our relevant work. Thank you again for your consideration of our requests and we look forward to meeting with you in the very near future.

With Great Expectations,

A handwritten signature in cursive script that reads "Rita Anita Linger". The signature is written in black ink and is positioned above the typed name and title.

Dr. Rita Anita Linger, PhD
CEO/Program Director
SERA, Inc.

Cc: SERA, Inc. Board of Directors

Southeast Raleigh City Councilman, Eugene Weeks



FY16 Other Outside Agency Funding Request: Transitions LifeCare (Hospice)

Funding Summary – *Transitions LifeCare requests \$250,000 for the one-time costs of expanding the existing facility by ten beds.*

FY16 City Funding Requested	FY15 City Funding Received	FY16 Agency Total Budget	FY14 Total Actuals	Request as % of FY14 Actuals (25% Policy)
\$250,000	\$0	\$30.9M	\$25,838,885	1%

**Please Note: Hospice received a human service agency grant in FY15 and has requested funding through the human services grant process for FY16.*

Applicant-Provided Information:

Agency and Program Description

Transitions LifeCare (TL) was founded in 1979 as Hospice of Wake County, with a goal to deliver in-home care to terminally ill patients. Created in response to an unmet community need, TL became the first and only program in the region to provide home health care at end of life. One staff member and 20 volunteers treated the first hospice patient, a child with leukemia. The response from the community was overwhelming, and over the 36 years that have followed, the agency has grown to provide not only hospice care, but also home health services, advanced planning, respite care and grief counseling, as well as community education programs. The growth has been so tremendous, that in 2009 the agency expanded its campus with the region's first freestanding inpatient hospice facility, the 20-bed Hospice Home. As this growth has continued, in April 2014, the agency changed its name from Hospice of Wake County to Transitions LifeCare to better reflect the increase services (not just hospice) and larger service area (not just Wake County).

Through early 2014, the Hospice Home had welcomed 2,965 patients and their families, reaching the trigger point set by North Carolina's Medical Facilities Plan for hospice providers to begin expansion plans. Since that time, daily patient census has reached full occupancy of 20 patients on most days. These numbers mean that without expansion, soon patients in need of care at the end of life will be turned away, placing a tremendous burden on emergency rooms and other community resources.

In response to this growing and urgent need among residents, Transitions has begun plans to construct an additional 10 rooms to the current Hospice Home. This response was driven not only by the Board and staff at TL, but also by the North Carolina Department of Health and Human Services who called for an additional 10 inpatient hospice beds to be created within Wake County to prepare for this growing and aging population.

When construction on the Hospice Home was begun in 2008, the long term vision to add these additional 10 rooms was established. As a result, the 20-bed facility was created to accommodate an eventual expansion—

the original infrastructure (oxygen tanks, HVAC and electrical) was built to hold a total of 30 patient rooms. As a result, this expansion will be streamlined in both cost and construction efforts, with a goal of meeting the growing community need while minimizing impact on current patients. Through this expansion, Transitions will be prepared to meet this growing community need.

Highlights of Agency Funding Request

Short/Long term benefits to public: By providing a high quality, cost-effective medical home for seriously and terminally ill residents, the Transitions LifeCare team hopes to improve the quality of living and dying for all those in the Raleigh community. The benefits will be a reduced burden to hospitals and other community resources, a reduced burden on the families of patients and an increase in the quality of life for those in Raleigh. Caring for vulnerable residents at the end of life, and their families, makes Raleigh a better place for all who live and work here and will continue to make Raleigh a premier community for residents and businesses.

The people served by this expansion will be the residents throughout the seven county service area. Patients come from a wide variety of backgrounds and diagnoses, as TL will serve anyone who is medically eligible and needs care. The majority of patients served (68%) are residents of Raleigh.

The Transitions LifeCare (TL) Hospice Home provides patients with a comprehensive program of medical care, emotional support, and spiritual guidance. Led by a compassionate, well-trained team of physicians, nurses, social workers, volunteers and more, care is provided 24 hours a day, seven days a week. Patients are served at the Hospice Home because they live alone and have no primary caregiver, because their caregiver is no longer able to perform the tasks required, or because they simply have no other home. For many, the Hospice Home offers a higher level of around-the-clock skilled care to manage crisis situations than can be provided in their own homes. For others, the Hospice Home is a place of respite to give family members temporary relief from the stresses of care giving. For those without a home, the Hospice Home has become a welcome haven to provide needed medical care and to help uninsured homeless patients avoid emergency room and hospital stays. To accommodate extended stays by family members, the Hospice Home features a communal living room, kitchen and dining room, a laundry room, children's playroom, home office, and a meeting room. Within steps of the Hospice Home are the Dorothy Kerr Spiritual Sanctuary, Kit Boney Grief Center, administrative building and beautifully landscaped gardens.

The proposed expansion will increase the home's interior space by 37% and will feature:

- 10 new private patient rooms with private bath and patios
- A new sunroom for patients, families and visitors
- A nurses station with a medication room
- A new nourishment station and three additional storage rooms

Additional gardens and outdoor spaces, including a Veterans Garden to honor those at end of life who served in the military.

If City funding is denied: If City funding is denied for this program, it could prevent Transitions from reaching the fundraising goal to begin construction. Transitions LifeCare remains deeply grateful to the City of Raleigh for the support on the initial construction of the facility. Continued partnership with the City on this project is critical to success of the expansion and to serving the community in end of life care. The City of Raleigh is being asked for support for two primary reasons—this facility expansion will allow TL to serve more Raleigh residents, and the service being provided at this facility is not only critical to residents but is one the City is

currently unable to provide on its own. Together, the City of Raleigh and Transitions can help care for the most vulnerable residents of the community.

Indicators of a successful program: Progress will be measured by the ability to reach targeted construction benchmarks and then once construction is complete, by the ability to successfully license the facility and open the beds to families.

Service Output & Outcome Measures

Outcome Measures	FY16 Target
Increase the number of beds available to the community by 50%	10
Serve an additional 400 patients per year	1,200

