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# FY 2025 FINANCIAL PARTNERS APPLICATIONS

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Council Budget Workshop  
March 25, 2024

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2025 Financial Partner applications.*

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Alliance Center for Education	\$90,000	\$126,000	<b>9</b>
Bengali Women’s Forum	\$10,000	\$10,000	<b>15</b>
Carolina Metro Reds (ARPA Funded)	\$50,000	\$50,000	<b>19</b>
Charlotte Regional Business Alliance	\$168,341	\$171,809	<b>23</b>
Community Building Initiative	\$50,000	\$50,000	<b>27</b>
For The Struggle, Inc. (ARPA Funded)	\$100,000	\$100,000	<b>33</b>
Greater Enrichment Program	\$200,000	\$200,000	<b>37</b>
My Brother’s Keeper CLT-Mecklenburg	\$50,000	\$300,000	<b>41</b>
National Institute of Minority Economic Development– The Women’s Business Center of Charlotte	\$50,000	\$65,000	<b>53</b>
Race Matters for Juvenile Justice	\$51,468	\$128,496	<b>61</b>
Safe Alliance	\$397,038	\$473,805	<b>65</b>
The Males Place (ARPA Funded)	\$100,000	\$100,000	<b>73</b>
Trees Charlotte	\$250,000	\$500,000	<b>77</b>
<b>New Applicant Financial Partners – General Fund</b>			
Be You Be Great	-	\$725,333	<b>89</b>
Bright Hope	-	\$10,000	<b>95</b>
Carolinas Asian Chamber of Commerce*	-	\$246,000	<b>99</b>
Community Leadership Academy	-	\$250,000	<b>105</b>
Envision Charlotte	-	\$200,000	<b>107</b>
Freedom Fighting Missionaries	-	\$100,000	<b>111</b>
Housing Collaborative	-	\$300,000	<b>115</b>
Roof Above	-	\$268,085	<b>119</b>
Stiletto Boss University	-	\$77,500	<b>125</b>
The United Way of Greater Charlotte	-	\$130,000	<b>129</b>
WYTV7 Community Broadcast	-	\$130,000	<b>135</b>
<b>Dedicated Revenue</b>			
Charlotte Center City Partners	\$6,796,745	\$7,508,026	<b>141</b>
Charlotte Regional Visitors Authority – Film Commission	\$150,000	\$150,000	<b>159</b>
Charlotte Regional Visitors Authority – Visit Charlotte	\$21,861,227	\$23,361,809	<b>165</b>
SouthPark Community Partners	\$1,614,682	\$1,614,682	<b>169</b>
University City Partners	\$1,380,857	\$1,408,474	<b>173</b>

\*Received \$250,000 in ARPA funding in FY 2024 for Small Business Ecosystem Partner Grant

Agency Name	FY 2024 Adopted Funding Amount	FY 2025 Funding Request	Page No.
<b>Housing and Neighborhood Services</b>			
Carolinas Care Partnership	\$3,598,683	\$3,320,702	<b>183</b>
Crisis Assistance Ministry	\$550,000*	\$575,000	<b>189</b>
DreamKey (formerly Charlotte Mecklenburg Housing Partnership) – Affordable Housing	\$1,690,000	\$1,860,000	<b>195</b>
DreamKey (formerly Charlotte Mecklenburg Housing Partnership) – House Charlotte	\$231,000	\$231,000	<b>195</b>
Local Initiative Support Corporation (LISC)	\$200,000	\$200,000	<b>201</b>

\*Crisis Assistance Ministries received an additional \$125,000 from ARPA funding for FY 2024 for a total funding amount of \$550,000.

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# **GENERAL FUND**

## **Financial Partners Application Submittal Overview**

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# General Fund – Financial Partners Summary

## Current Financial Partners - General Fund Status of FY 2024 Reporting and FY 2025 Plans

Financial Partner	Performance Measures		FY 2025 Application			
	FY 2023 Performance Measure Actuals	FY 2024 Performance Measure Mid-year	FY 2025 Submitted Form	Overall Agency Budget	Overall Program Budget	Revenues
Alliance Center for Education	✓	✓	✓	✓	✓	✓
Bengali Women’s Forum	✓	✓	✓	✓	N/A	✓
Carolina Metro Reds (ARPA Funded)	N/A <sup>1</sup>	✓	✓	✓	N/A	✓
Charlotte Regional Business Alliance	✓	✓	✓	△	N/A	✓
Community Building Initiative	✓	✓	✓	✓	N/A	✓
For The Struggle, Inc. (ARPA Funded)	N/A <sup>1</sup>	✓	✓	✓	N/A	✓
Greater Enrichment Program	✓	✓	✓	✓	N/A	✓
My Brother’s Keeper CLT-Mecklenburg	✓	✓	✓	✓	✓	✓
National Institute of Minority Economic Development – The Women’s Business Center of Charlotte	✓	✓	✓	✓	✓	✓
Race Matters for Juvenile Justice	N/A <sup>1</sup>	✓	✓	✓	N/A	✓
Safe Alliance	✓	✓	✓	✓	✓	✓
The Males Place (ARPA Funded)	N/A <sup>1</sup>	✓	✓	△	N/A	✓
Trees Charlotte	✓	✓	✓	✓	N/A	✓

1 – Not Financial Partner in FY 2023

Submitted - ✓  
 Incomplete - △  
 Not submitted - ✗

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# New Applicant Financial Partners - General Fund

## Status of FY 2025 Plan Submittals

Organization	FY 2025 Application			
	FY 2025 Submitted Form	Overall Agency Budget	Overall Program Budget	Revenues
Be You Be Great	✓	△	△	△
Bright Hope	✓	✓	N/A	✓
Carolinas Asian Chamber of Commerce	✓	✓	N/A	✓
Community Leadership Academy	✓	✓	N/A	✓
Envision Charlotte	✓	✓	N/A	✓
Freedom Fighting Missionaries	✓	✗	✗	✗
Housing Collaborative	✓	✓	N/A	✓
Roof Above	✓	✓	✓	✓
Stiletto Boss University	✓	✓	N/A	✓
The United Way of Greater Charlotte	✓	✓	✓	✓
WYTV7 Community Broadcast	✓	✓	✓	✓

Submitted - ✓  
 Incomplete - △  
 Not submitted - ✗

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# **GENERAL FUND**

## **Current Financial Partners**

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# FY 2025 Financial Partner Agency Summary

Agency Name: **Alliance Center for Education**

## Agency Description

The Alliance Center for Education Inc., formerly the Bethlehem Center of Charlotte, works with children and families to break the cycle of poverty by providing a continuum of high quality educational and support services. Founded by United Methodist Women in 1940, AC4Ed has improved economic mobility for thousands of children through early childhood education and development, and K-12 year-round programming that reinforces lessons learned in school and reduces learning loss in the summer. Alliance Center for Education Inc. provides comprehensive, holistic, and integrated services in order to support the healthy development of children and families and builds partnerships with those whom we serve to facilitate ownership of their personal growth and success.

## Agency Established

1940

## Agency Funding Request

FY 2024 Approved	FY 2025 Request	Difference
\$90,000	\$126,000	\$36,000

## Total years financial partner with City of Charlotte

6 Years

## FY2024 Performance Measures and Targets

Objective	Measures	Target	FY 2023 Actual	FY 2024 Mid-Year
Provide STEAM and Literacy education, promote life skills and problem solving, offer cultural exposure opportunities and guidance to make healthy choices	All students and families complete surveys and goal setting to develop student goals and interest areas.	80% of students and families meeting or exceeding goals	100% of families completed survey	100% families have completed survey
College and Career exploration opportunities for middle and high school students	Engage eligible students in guest speaker events, tours of local businesses and/or colleges and universities	Provide six (6) opportunities per program year for career/college exploration	9 Completed	3 Completed
Provide mental health support to all students to mitigate the seen and unseen effects of the COVID-19 pandemic	Utilize partners and trained professionals to offer opportunities to explore mental health needs and healthy behaviors	Provide mental health education and services twice (2) per month	12 Completed	6 Completed

## Population Served

Our target population is students in grade K through 12th who reside in center city, east, west or south Charlotte specifically in zip codes 28203, 28206, 28208, 28205, 28215 and 28212. They must either come from families with incomes no more than 80% above the federal poverty level, be without a permanent residence, a recipient of Temporary Assistance of Needy Families (TANF), or currently receiving intervention from the Department of Social Services.

The Charlotte Chamber of Commerce's latest Economic Development report (2014) lists the zip codes that make up Alliance Center for Education's service area and subsequently where our centers are located contain populations that only 17% of the residents have some college education collectively. 2010 US Census data states that approximately 12% of Mecklenburg County residents aged 25 or older do not have a High School Diploma or equivalent while the percentage of residents living in poverty is almost identical at 12.5% (approximately 115,000 people).

## Council Priority Area(s)



Safe  
Communities



Great  
Neighborhoods

## Describe the activities that will be supported through requested city funding

Our program provides students with high quality out of school time academic and life skills enrichment. We operate Monday- Friday from 2:30pm to 6:30pm on school days and from 8:00am to 5:00pm on full- day workdays and early release per the public school calendar. Kindergarten – 5<sup>th</sup> grade AC4Ed OST Engage children as lifetime learners by exploring the fun in math, art, science, music, nutrition, and much more in learn-at-play activities in the afternoon hours. Our OST educational professionals keep schoolwork on track with homework help and tutoring. Physical fitness activities, special events, arts and crafts, and field trips round out the comprehensive programming. 6<sup>th</sup> grade – 12<sup>th</sup> grade OST – AC4Ed Teen Leadership Cooperative Our OST program for students entering their teens is a social learning environment, designed to help each individual learn and apply critical thinking skills that will serve them for a lifetime. In addition to tutoring and homework assistance, OST educational professionals' mentor our AC4Ed students in personal development and character education, how to set goals, manage time, plan for a good financial future, recognize the advantages and disadvantages of different types of career opportunities, and consider college options and college tours. Guest speakers, field trips, special events, and exploration in arts, music and nutrition sciences provide a balanced educational experience! The key components of our implementation plan are: - A minimum of 45 minutes each day for homework assistance (additional tutoring is provided based on need). – Weekly activity plans containing at least 4 hours of teacher/tutor-led enrichment in literacy, math, science, art, social studies, and technology. – Weekly group activities in leadership, character building, career

## If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?

Funding supports the transition of our Lead Teachers to full-time, 40-hour employees. In the current environment of the Covid-19 pandemic, retention is paramount to quality programming and student success, and employees desire certainty in the workplace. These additional fulltime hours create collaboration with the school system in order to foster a cohesive support system for student success and benefit while closing any academic gaps related to the pandemic. Program Lead Teachers will include 2 Lead Teacher positions, which will be allocated 100% to the City funding. These positions will be paid bi-weekly at \$1,112.5 per pay period, based on an FTE of 40 hours. Payroll taxes, health benefits, and retirement matches will also be paid out of this portion of funding. The activities supported would continue to build and develop ongoing relationships with community partners and feeder schools. They will be able to increase support in the areas of academics and CMS partnership through volunteering, academic interventions, post-secondary explorations, and character building. Staff will be more accessible to parents to enhance family engagement and support to the family through parent-teacher conferences and parent workshops. This transition also allows additional staff time for professional development to ensure quality programming in the areas of mental health, trauma-informed care, and diversity training.

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Safe Communities	Increase community involvement through student civic engagement and community service	<b>NEW MEASURE</b> Number of agency and student-led programs to increase knowledge of civic issues	Participation in four (4) projects per program year (August to July)
Safe Communities	Student and family programming to educate on issues affecting our communities	<b>NEW MEASURE</b> Provide programming events in response to family interest as indicated on entrance surveys	Four (4) events offered per program year
Great Neighborhoods	Provide STEAM and Literacy education, promote life skills and problem solving, offer cultural exposure opportunities and guidance to make healthy choices	All students and families complete surveys and goal setting to develop student goals and interest areas.	80% of students and families meeting or exceeding goals
Great Neighborhoods	College and Career exploration opportunities for middle and high school students	Engage eligible students in guest speaker events, tours of local businesses and/or colleges and universities	Provide six (6) opportunities per program year for career/college exploration
Great Neighborhoods	Provide mental health support to all students to mitigate the seen and unseen effects of the COVID-19 pandemic	Utilize partners and trained professionals to offer opportunities to explore mental health needs and healthy behaviors	Provide mental health education and services twice (2) per month

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Cultural competency and Responsiveness	Promote respect for cultural diversity and creates an inclusive, welcoming and respectful environment	4 diversity trainings per year; with 4 program specific workshops for parents and participants around Diversity and Inclusion.
Safe Communities	Family, School, and Community Relationships	Build respectful, reciprocal relationships across settings to promote optimal development for kids and families and to enhance quality, access, and equity	Actively engage in 2 school activities/bi-monthly and 2 community activities/events bi-monthly

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 6,593,719	\$ 6,615,885	\$ 6,814,362	\$ 65,533	1.0%
Merit	\$ 203,929	\$ 204,615	\$ 210,753	\$ 2,000	0.9%
Benefits	\$ 1,204,720	\$ 1,260,220	\$ 1,272,822	\$ 30,167	2.4%
<b>Subtotal Personnel Expenses</b>	<b>\$ 8,002,368</b>	<b>\$ 8,080,720</b>	<b>\$ 8,297,937</b>	<b>\$ 97,700</b>	<b>1.2%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 61,350	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 213,738	\$ 214,500	\$ 215,000	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 1,207,192	\$ 1,146,737	\$ 1,200,000	\$ -	0.0%
Office Supplies	\$ 55,507	\$ 55,000	\$ 56,000	\$ -	0.0%
Travel & Training	\$ 302,519	\$ 141,000	\$ 145,000	\$ 4,000	2.8%
Technology	\$ 218,358	\$ 220,000	\$ 225,000	\$ 6,300	2.8%
Classroom Supplies and Materials	\$ 524,686	\$ 525,000	\$ 527,000	\$ 18,000	3.4%
Audit and Legal Fees	\$ 42,046	\$ 43,000	\$ 45,000	\$ -	0.0%
Interest and Bank Fees	\$ 38,964	\$ 38,250	\$ 38,250	\$ -	0.0%
Direct Program Services	\$ 63,540	\$ 64,000	\$ 65,000	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 2,727,900</b>	<b>\$ 2,447,487</b>	<b>\$ 2,516,250</b>	<b>\$ 28,300</b>	<b>1.1%</b>
<b>Total Expenditures</b>	<b>\$ 10,730,268</b>	<b>\$ 10,528,207</b>	<b>\$ 10,814,187</b>	<b>\$ 126,000</b>	<b>1.2%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 9,913,299	\$ 10,326,917	\$ 10,826,917
Mecklenburg County Funding	\$ 303,622	\$ 108,500	\$ 108,500
Foundation Grants & Funding	\$ 76,000	\$ 100,000	\$ 100,000
Donor Contributions	\$ 112,346	\$ 117,000	\$ 120,000
Service Fees	\$ 46,330	\$ 45,000	\$ 45,000
Other Revenue	\$ 81,938	\$ 116,366	\$ 117,000
<b>Total Revenues</b>	<b>\$10,533,535</b>	<b>\$ 10,813,783</b>	<b>\$ 11,317,417</b>

### If requesting funding for a specific program within your agency, please provide description of the specified program

Our program provides students with high quality out of school time academic and life skills enrichment. We operate Monday- Friday from 2:30pm to 6:30pm on school days and from 8:00am to 5:00pm on full-day workdays and early release per the public school calendar.

#### *Kindergarten – 5th grade AC4Ed OST*

Engage children as lifetime learners by exploring the fun in math, art, science, music, nutrition, and much more in learn-at-play activities in the afternoon hours. Our OST educational professionals keep schoolwork on track with homework help and tutoring. Physical fitness activities, special events, arts and crafts, and field trips round out the comprehensive programming.

#### *6th grade – 12th grade OST – AC4Ed Teen Leadership Cooperative*

Our OST program for students entering their teens is a social learning environment, designed to help each individual learn and apply critical thinking skills that will serve them for a lifetime. In addition to tutoring and

homework assistance, OST educational professionals' mentor our AC4Ed students in personal development and character education, how to set goals, manage time, plan for a good financial future, recognize the advantages and disadvantages of different types of career opportunities, and consider college options and college tours. Guest speakers, field trips, special events, and exploration in arts, music and nutrition sciences provide a balanced educational experience!

*The key components of our implementation plan are:*

- A minimum of 45 minutes each day for homework assistance (additional tutoring is provided based on need).
- Weekly activity plans containing at least 4 hours of teacher/tutor-led enrichment in literacy, math, science, art, social studies, and technology.
- Weekly group activities in leadership, character building, career exploration, team building, problem solving, healthy living, cultural awareness and financial literacy.

Our aim is to:

- Increase high school graduation rate
- Develop skills to make wise lifestyle choices (abstaining from substance abuse, violence, and bullying)
- Encourage volunteerism in the community
- Increase enrollment in college/career-path training
- Support students and their families through critical transitions (pre-K to elementary, elementary to middle school, middle to high school, and high school to college or career training)
- Partner families with community collaborators to address family goals and needs

## Overall Program Budget

	Expenditures FY 2023- FY 2025				Percent city request of overall budget
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	
<b>Personnel</b>					
Salaries	\$ 304,636	\$ 218,874	\$ 223,251	\$ 65,533	29.4%
Merit	\$ 2,000	\$ 3,000	\$ 3,000	\$ 2,000	66.7%
Benefits	\$ 52,824	\$ 46,500	\$ 47,430	\$ 30,167	63.6%
<b>Subtotal Personnel Expenses</b>	<b>\$ 359,460</b>	<b>\$ 268,374</b>	<b>\$ 273,681</b>	<b>\$ 97,700</b>	<b>35.7%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 61,350	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 14,080	\$ 14,000	\$ 14,500	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 57,052	\$ 43,795	\$ 44,500	\$ -	0.0%
Office Supplies	\$ 2,546	\$ 2,100	\$ 2,200	\$ -	0.0%
Travel & Training	\$ 11,582	\$ 4,425	\$ 4,500	\$ 4,000	89.0%
Technology	\$ 11,085	\$ 7,275	\$ 7,300	\$ 6,300	86.0%
Classroom Supplies and Materials	\$ 24,692	\$ 21,000	\$ 25,000	\$ 18,000	72.0%
Direct Program Services	\$ 21,206	\$ 22,000	\$ 22,500	\$ -	0.0%
Indirect	\$ 59,765	\$ 51,905	\$ 55,813	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 263,358</b>	<b>\$ 166,500</b>	<b>\$ 176,313</b>	<b>\$ 28,300</b>	<b>16.0%</b>
<b>Total Expenditures</b>	<b>\$ 622,818</b>	<b>\$ 434,874</b>	<b>\$ 449,994</b>	<b>\$ 126,000</b>	<b>28.0%</b>

Revenues			
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ 90,000	\$ 90,000	\$ 126,000
Mecklenburg County Funding	\$269,350	\$ 108,350	\$ 108,350
Foundation Grants & Funding	\$ 51,665	\$ 55,000	\$ 55,000
Donor Contributions	\$175,053	\$ 144,774	\$ 159,894
Service Fees	\$ 750	\$ 750	\$ 750
Other Revenue	\$ -	\$ -	\$ -
<b>Total Revenues</b>	<b>\$586,818</b>	<b>\$ 398,874</b>	<b>\$ 449,994</b>

### Current Board of Directors

Samantha Dunbar	Chris Shanahan	Micheline Matthews
Jorge Manjarres, Treasurer	Alexandria Addison	Maudre' Addison
Andy Belk	Scott Burns	John DeMicco
Stephanie Dunn	Barbara Holt	Kim Langstaff
Ronda K. Williams	Micheline Mathews	Raquel Rivera

# FY 2025 Financial Partner Agency Summary

Agency Name: **Bengali Women's Forum**

## Agency Description

Over the course of history, Women have played some of society's most significant roles. While in today's world, we like to believe that there is equality between Women and Men, our society shows this idea is not completely true.

The Bengali Women's Forum (BWF) was founded on various fundamental principles: equity for equality, equal opportunity, and opportunity for well-being. BWF believes that it is imperative to ensure collaboration and community among Women for progress to occur. Based out of Charlotte, North Carolina, BWF provides constructive programming around current affairs, social concerns, personal and professional development, and informal gatherings, all designed to strengthen and nurture connections among communities across the greater city.

BWF is driven by the motto, "Aamrai Poriborton, we are the change." Being the change that this society wants to see, BWF strives to address the many burning issues that are affecting women and men in Charlotte. It was built to provide services around current events, social issues, and development to strengthen and nurture connections among the community.

BWF started working in society in FY 2019 using the power of volunteering and supporting various causes of the society directly or by partnering with other non-profit organizations and influencing changes in the lives of individuals. In 2020, the founder of BWF decided to create its own identity of BWF and registered the organization under 501c3 non-profit in January 2020. Afterward, BWF started being the catalyst of change for society.

## Agency Established

2020

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$10,000	\$10,000	\$0

## Total years financial partner with City of Charlotte

3 years

## FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Develop a framework for Social & Economic empowerment	Frequencies of program rollouts and participants	7 sessions 80-90 Participants	3 Sessions 50+ participants	3 Sessions 1,098 Participants
Develop participant soft skills to be future-ready through the Skill 2.0 program	Frequencies of program rollouts and participants	7 Sessions 70 Participants	4 Sessions 50+ participants	2 Sessions 60 Participants
Measure program effectiveness through participant survey/feedback	Number of surveys/feedback provided	60	50	50

## Population Served

1. Served Afro American, Asian & American populations by running a cancer awareness program and providing a medical consulting platform with the renowned medical practitioners and Doctors of Charlotte
2. Leaders in making – Our Children is Civic Leaders is a flagship child education & recognition program to instill leadership tenets in the minds of young leaders. This program covers Asian, American and Afro American, and Latino communities
3. Providing financial support to the homeless people across races and ethnicity for their shelter and food during the pandemic
4. Uplifting the hygiene of the daily lives of the women across populations living below the poverty line by supporting Feminine care products to the community
5. In 2022, BWF has worked with the AAPI community (Asian-Americans and Pacific Islanders) to root out racism by building stronger relationships and supporting community-led solutions by providing programs and trainings

## Council Priority Area(s)



Workforce & Business  
Development

### Describe the activities that will be supported through requested city funding

There have been multiple anti-Asian hate incidents in Charlotte in past 3 years and BWF believes that the AAPI community needs support in multiple ways and therefore proposing the following avenues to increase the outreach to AAPI owned businesses, families, and women.

1. Conducting Training using social channels on Harassment Intervention Training  
This will be conducted either through a volunteered led inhouse program or by partnering with an established social organization at Charlotte to make the participants aware that how important is to address even the seemingly inconsequential behaviors of any individuals if noticed in a public place to prevent any large-scale escalation of the matter which can lead into Harassment or major situation including loss of life.
2. Building social consciousness by highlighting matters through various BWF's established channels
  - Campaign & fundraising to support the cause and stand beside the AAPI victims
  - Social awareness campaign through social media
3. To stand by the Victims, Victims family, the suffering society and provide them the necessary training and help build skills to overcome their financial impact by getting a good job in the Charlotte market. This objective will be aligned with the ongoing programs of BWF, i.e. through the Social & Economic Empowerment Program & Skill 2.0 program.
  - Social & Economic Empowerment Program - This program will focus on improving the skills of the impacted AAPI person or their family members or impacted society members who have suffered substantial financial challenge due to the hate incident happened with their family or individuals and they are in dire need to re-establish themselves financially. BWF will stand beside them and will provide free coaching and help in building skills that will eventually help them to get jobs or help in rebuilding their business
  - Skill 2.0 program - This program will focus on specifically the Victims children and help them to be Future Ready

Both programs mentioned in point 3 above falls under the 'Workforce and Business Development' strategic priorities of the city and an established operating model of BWF. The details of the same were shared previously as part of the initial grant request and the same has been furnished below as the implementable model to stand beside the AAPI community and help them to be Strong Mentally & Financially.

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Social & Economic Empowerment	Providing a development platform for all	Program Frequency and Event Participation
Workforce & Business Development	Social & Economic Empowerment	<b>Direct outcome:</b> eventually, the participants get the job interview according to their capabilities <b>Indirect outcome:</b> individual performance improvements in one or all of the identified parameters such as Psychological, Social, Human capabilities, and Individual assets	Participants to get job interviews or Participants Feedback on effectiveness
Workforce & Business Development	Future-ready workforce Development (Skill 2.0 program)	Develop the soft skills to be future-ready (Skill 2.0 program)	Unique platform to learn soft skills

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	AAPI Community driven programs	Event Participation	Train 60 participants in a year

## Overall Agency and Program Budget

Expenditures FY 2023- FY 2025						
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget	
<b>Personnel</b>						
Salaries	\$ -	\$ 1,800	\$ 1,800	\$ 1,800	100.0%	
Merit	\$ -	\$ -	\$ -	\$ -	0.0%	
Benefits	\$ -	\$ -	\$ -	\$ -	0.0%	
<b>Subtotal Personnel Expenses</b>	<b>\$ -</b>	<b>\$ 1,800</b>	<b>\$ 1,800</b>	<b>\$ 1,800</b>	<b>100.0%</b>	
<b>Operating</b>						
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ 1,200	\$ 1,500	\$ 1,500	100.0%	
Communications (e.g. publishing, marketing)	\$ -	\$ 1,200	\$ 900	\$ 900	100.0%	
Facilities (e.g. rent, utilities)	\$ 6,373	\$ 1,000	\$ 1,000	\$ 1,000	100.0%	
Office Supplies	\$ 1,583	\$ 600	\$ 600	\$ 600	100.0%	
Travel & Training	\$ -	\$ 3,000	\$ 3,000	\$ 3,000	100.0%	
Technology	\$ -	\$ 600	\$ 600	\$ 600	100.0%	
Misc Other	\$ 350	\$ 600	\$ 600	\$ 600	100.0%	
Insurance	\$ 1,189	\$ -	\$ -	\$ -	0.0%	
<b>Subtotal Operating Expenses</b>	<b>\$ 9,495</b>	<b>\$ 8,200</b>	<b>\$ 8,200</b>	<b>\$ 8,200</b>	<b>100.0%</b>	
<b>Total Expenditures</b>	<b>\$ 9,495</b>	<b>\$ 10,000</b>	<b>\$ 10,000</b>	<b>\$ 10,000</b>	<b>100.0%</b>	
BWF manage the financial books in alignment with IRS filling guidelines. i.e. from Jan 2023 to Dec 2023.						
The furnished numbers are in alignment of published statement of financial positions for 2023.						

	Revenues		
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ 1,000	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ -	\$ -	\$ -
Donor Contributions	\$ 500	\$ 1,000	\$ 1,000
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ -	\$ -	\$ -
<b>Total Revenues</b>	<b>\$ 1,500</b>	<b>\$ 1,000</b>	<b>\$ 1,000</b>

### Current Board of Directors

	Name
Board of Directors	Shanta Dutta
	Karli Bose
	Debsundar Dutta
	Bhaswati Biswas
Advisory Council	Dhanonjoy Chowdhury Saha
	Ritu Mukherjee
	Lopamudra Das Roy
	Saswati Collam
	Arun Kallikadavill

# FY 2025 Financial Partner Agency Summary

Agency Name: **Carolina Metro Reds**

## Agency Description

The Carolinas Metro Reds provide a diverse, family environment for underserved youth to develop their baseball, academic and life skills by way of high-level coaching, teaching and mentorship. Led by former MLB player Coach Morris Madden and established as a 501c3 nonprofit in 2011, CMR has fielded multipled teams (200+ total players) with an emphasis on disadvantaged and underserved minority participants. Our organization's focus is engaging with people who love baseball and youth, partnering with schools, churches, businesses, other nonprofits and other baseball organizations and leveraging social capital for the benefit of participating players and families. We offer a unique opportunity to the youth and families we serve -- one that is both professionally run and economically affordable -- which is an opportunity to play baseball (many for the first time) with emphasis on life skills and education. We have strong leadership, with outstanding ability to coach and grow players and are well-connected to the broader baseball community, including MLB. From practice and full uniform games to tutoring sessions and mentor discussions, we expect active player and parent engagement in the organization, both on and off the field.

## Agency Established

2011

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$50,000	\$50,000	\$0

(FY 2024 ARPA Funded)

## Total years financial partner with City of Charlotte

1

## FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Growth	Growth in number of players as a measure of reach and Impact	300	200	234
Reading Levels	% of K-5 students reading at Grade Level as measured by internal assessment and/or school EOG	80%	TBD	TBD
Retention	% of players returning year-to-year as a measure of value/ satisfaction of the players/ family	50%	TBD	TBD
Engagement	% of families engaged (consistent participation in practices, games, and community/family events)	70%	80%	TBD
Career Pathway	% of seniors graduating from high school and progressing to college (2yr/4 yr) or vocation (i.e. construction; military)	90%	90%	90%
Minority Participation	% of players from African American and Hispanic communities	90%	95%	96%

## Population Served

Players and families from across the county participate on teams, but we have a particular emphasis in west Charlotte, as our home fields are the newly renovated Stick Williams Dream Fields and Education Center (7531 Tuckaseegee Road, Charlotte, NC 28214) operated by the Knothole Foundation. The age range of participation is from 4 years old (tBall) thru 18 years old (high school) with an emphasis on growing younger players

## Council Priority Area(s)



### Describe the activities that will be supported through requested city funding.

The Carolinas Metro Reds have been a financial partner with the City of Charlotte in the 2023/2024 Fiscal Year. For this 2024/2025 Fiscal Year submission, we intend for the primary use of incremental funding to be deployed in a very similar fashion, which is toward employing/contracting people who will be focused on the coaching, tutoring, and operation of the organization. There has been no material change in economic position (significant percentage of operating costs are related to uniforms, equipment, umpires, league fees and tournaments) or programmatic focus (continues to be growing the number of players and using baseball as a vehicle to grow education and life skills in youth), so the orientation of the organization and deployment of incremental funds is intended to be in support of people representing the organization, on and off the field, and their impact on player and families. Historically, our ability to invest in people (after covering required operational cost) has been limited, and key roles related to coaching, teaching, transportation, and operational support have been filled where possible thru committed volunteers. While we have been proud of this resourcefulness, we recognize that the growth and impact will be constrained by such significant leverage of volunteers, and that the scale and pace of targeted impact will be greatly supported by fairly and modestly compensating people for taking on key roles. The funding committed by the City of Charlotte for this past year has been enormously important to the confidence we've had in committing to targets and ability to secure key resources to complete important programmatic deliverables. We will continue to be resourceful, and leverage volunteers where possible, we will target key roles to provide some level of reliable compensation such as: 1. Coaching (lead coach for each of the six age groupings, shared across multiple teams where appropriate); 2. Teaching/Tutoring – experienced teachers for reading literacy and for college preparation; 3. Operational Support – increased support for key operational activities including team and organizational communication, scheduling, risk management, and financial management

### FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Safe Communities	Growth	Growth in number of players as a measure of reach and impact	345
Safe Communities	Reading Levels	% of K-5 students reading at Grade Level as measured by internal assessment and/or school EOG	80%
Safe Communities	Retention	% of players returning year-to-year as a measure of value/satisfaction of the players/ family	60%
Safe Communities	Engagement	% of families engaged (consistent participation in practices, games, and community/family events)	70%
Great Neighborhoods	Career Pathway	% of seniors graduating from high school and progressing to college (2yr/4 yr) or vocation (i.e. construction; military)	90%

### FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Diversity, Equity, and Inclusion	Youth participants from minority community (African American and Hispanic)	90%
Safe Communities	Diversity, Equity, and Inclusion	Leadership and Board Representation from minority community	50%

## Overall Agency and Program Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 59,468.25	\$ 97,000.00	\$ 75,000.00	\$ 50,000.00	66.7%
Merit	\$ -	\$ -	\$ -	\$ -	0
Benefits	\$ -	\$ -	\$ -	\$ -	0
<b>Subtotal Personnel Expenses</b>	<b>\$ 59,468.25</b>	<b>\$ 97,000.00</b>	<b>\$ 75,000.00</b>	<b>\$ 50,000.00</b>	<b>66.7%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 2,173.00	\$ 5,000.00	\$ 5,250.00	\$ -	0.0%
Facilities (e.g. rent, utilities)		\$ 5,000.00	\$ 5,000.00	\$ -	0.0%
Office Supplies	\$ 1,516.27	\$ 3,000.00	\$ 3,150.00	\$ -	0.0%
Travel & Training	\$ 22,138.13	\$ 25,000.00	\$ 26,250.00	\$ -	0.0%
Technology	\$ -	\$ -	\$ -	\$ -	0.0%
Insurance	\$ 5,315.88	\$ 5,500.00	\$ 5,775.00	\$ -	0.0%
Accounting	\$ 5,616.00	\$ 6,000.00	\$ 6,300.00	\$ -	0.0%
Equip/Uniforms/League Fees/Umpires	\$ 21,758.97	\$ 23,500.00	\$ 24,675.00	\$ -	0.0%
Charitable Donation	\$ 4,000.00			\$ -	0.0%
Bank Service Charges	\$ 1,536.28	\$ 1,000.00		\$ -	0.0%
Miscellaneous	\$ 3,106.06	\$ 6,250.00	\$ 7,500.00	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 67,160.59</b>	<b>\$ 80,250.00</b>	<b>\$ 83,900.00</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Total Expenditures</b>	<b>\$ 126,628.84</b>	<b>\$ 177,250.00</b>	<b>\$ 158,900.00</b>	<b>\$ 50,000.00</b>	<b>31.5%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ -	\$ -	\$ -
Donor Contributions	\$ 108,608.29	\$ 112,000.00	\$ 134,400.00
Service Fees	\$ 12,827.84	\$ 15,999.00	\$ 19,000.00
Other Revenue	\$ -	\$ -	\$ -
<b>Total Revenues</b>	<b>\$ 121,436.13</b>	<b>\$ 127,999.00</b>	<b>\$ 153,400.00</b>

## Current Board of Directors

Bob Szymkiewicz	Dee White
Pepper Pounds	Jamall Kinard
Victoria Watlington	Joel Matthews
Alan Barnes	Fred Wright
Morris Madden	

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# FY 2025 Financial Partner Agency Summary

Agency Name: **Charlotte Regional Business Alliance**

## Agency Description

The CLT Alliance is the voice of business and the only regional economic development organization that grows the economy, advocates for business and convenes diverse stakeholders for the Charlotte Region. We are a public-private partnership serving as the Charlotte Region's voice of business for equitable economic growth. We grow the economy, position the region to compete for business investment, and connect through shared purpose initiatives that no single individual nor organization can tackle alone. The CLT Alliance is the voice of business and the only regional economic development organization that 1) Advocates for Business, so organizations here can thrive. 2) Convenes diverse stakeholders to solve difficult challenges for the Charlotte Region (City of Charlotte and 15-county bi-state region). We are the only organization that promotes the region as a place to do business throughout the world, and together with our regional partners celebrate our wins.

## Agency Established

2019

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$168,341	\$171,809	\$3,468

## Total years financial partner with City of Charlotte

14 years

## FY2024 Performance Measures and Targets

Objective	Measures	FY2023 Actual	FY2024 Target	FY2024 Mid-Year
Promote Economic opportunity.	# of Identified Investment Opportunities	250	200	288
Delivery of competitive services – expand tax base and revenues	Qualified Projects: New recruitment expansion & development projects that meet qualification criteria.	40	40	43
Delivery of competitive services – expand tax base and revenues	# marketing trips (site selectors, trade groups, domestic and international)	64	45	52
Delivery of competitive services – expand tax base and revenues	Site Selector meetings	170	150	201

## Population Served

The Charlotte Regional Business Alliance markets the City of Charlotte and bi-state 15-county Charlotte region through a collaborative effort, leveraging local dollars by promoting a unified Charlotte Region working collectively to attract and grow investment from companies domestically and internationally.

## Council Priority Area(s)



Workforce & Business  
Development

### **Describe the activities that will be supported through requested city funding**

The funding will support the following activities:

- 1) Identified Investment Opportunities: These are the total # of Qualified Projects, Qualified Leads and General Leads.
- 2) Qualified Projects: New Recruitment, Expansion & Development Projects that meet 3-step qualification criteria.
- 3) Marketing Trips: Build Awareness & Expand Influence; travel to target markets & pitch decision-makers to yield project and identify opportunities directly or via a conference.
- 4) Site Selector Meetings: Corporate decision maker and influencer meetings where we yield projects and build relationships with these consultants for more projects.

In the Equity side, the funding will support the continuation and expansion of the Select CLT program.

- Diverse entrepreneurs participate in Scale Up CLT, enabling them to gain business acumen and social capital critical to growing their business.

### **If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?**

The funding request for FY25 is increasing against last year due to the population growth in Mecklenburg County. The population estimate for 2022 is 1,145,392. This number is 2.06% higher than the one used in FY24.

Last year's request was \$168,341.00

FY25 request is: \$171,808.80

Increase of \$3,467.80 or 2.06%

The additional funds help to partially close the gap created by cost increases in all services and labor that we utilize to deliver our mission.

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 4,212,758	\$ 4,403,308	\$ 4,535,407	\$ -	0.0%
Merit	\$ 179,768	\$ 115,552	\$ 120,000	\$ -	0.0%
Benefits	\$ 1,062,288	\$ 1,054,721	\$ 1,058,583	\$ -	0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 5,454,814</b>	<b>\$ 5,573,581</b>	<b>\$ 5,713,990</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 837,547	\$ 585,555	\$ 600,000	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 933,580	\$ 945,932	\$ 964,851	\$ -	0.0%
Office Supplies	\$ 20,678	\$ 44,500	\$ 35,000	\$ -	0.0%
Travel & Training	\$ 148,607	\$ 170,735	\$ 150,000	\$ -	0.0%
Technology	\$ 193,431	\$ 143,534	\$ 150,000	\$ -	0.0%
Business Recruiting Expenses	\$ 477,458	\$ 508,940	\$ 520,000	\$ -	0.0%
Event Expenses	\$ 993,237	\$ 978,388	\$ 950,000	\$ -	0.0%
Advocacy/Research	\$ 352,528	\$ 383,365	\$ 400,000	\$ -	0.0%
Foundation Expenses	\$ 762,000	\$ 625,692	\$ 775,000	\$ -	0.0%
Professional Fees	\$ 192,658	\$ 201,710	\$ 230,000	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 4,911,724</b>	<b>\$ 4,588,351</b>	<b>\$ 4,774,851</b>	<b>\$ 171,809</b>	<b>3.60%</b>
<b>Total Expenditures</b>	<b>\$ 10,366,538</b>	<b>\$ 10,161,932</b>	<b>\$ 10,488,841</b>	<b>\$ 171,809</b>	<b>1.64%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 515,259	\$ 511,337	\$ 524,121
Mecklenburg County Funding	\$ 332,761	\$ 336,683	\$ 345,100
Foundation Grants & Funding	\$ 1,355,700	\$ 1,052,200	\$ 1,200,000
Donor Contributions	\$ 379,763	\$ 250,000	\$ 300,000
Investor Dues	\$ 6,666,907	\$ 7,061,986	\$ 7,273,846
Other Revenue	\$ 1,196,007	\$ 959,639	\$ 1,000,000
<b>Total Revenues</b>	<b>\$10,446,397</b>	<b>\$ 10,171,845</b>	<b>\$ 10,643,066</b>

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Promote Economic Opportunity	# of Identified Investment Opportunities	200
Workforce & Business Development	Delivery of competitive services - expand tax base and revenues	Qualified projects. New recruitment expansion & development projects that meet qualification criteria	40
Workforce & Business Development	Delivery of competitive services - expand tax base and revenues	# of marketing trips (site selectors, trade groups, domestic and international)	45
Workforce & Business Development	Delivery of competitive services - expand tax base and revenues	# of site selector meetings	150

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Provide programming in communities of color, underrepresented communities and/or communities with low income.	Number of diverse entrepreneurs participating in the Scale Up CLT program.	20

### Current Executive Committee

Jenn Bosser	Valerie Kinloch
Derick Close	Janet LaBar
Kieth Cockrell	David Longo
Kristi Coleman	Dan Lugo
Malcomb Coley	Karen Mattiomore
Kinneil Coltman	Christopher Moxley
Rod Crider	Chris Paterson
Bojan Cukic	Ben Pickett
Kandi Deitemeyer	Shalanna Pirtle
Dena Diorio	Walter Price
Saad Ehtisham	Abbey Rampy
John Giannuzzi	Carrie Ruddy
Brett Gray	Alan Sauber
Geoff Gray	Hunter Shull
Kevin Hart	Ali Summerville
David Head	Laura Ullrich
Reg Henderson	Fred Whitfield
Julie Janson	
Marcus Jones	
Dave Katz	

# FY 2025 Financial Partner Agency Summary

## Agency Name: **Community Building Initiative**

### Agency Description

Community Building Initiative (CBI) advances access, inclusion and equity in Charlotte-Mecklenburg. Founded as a task force in 1997 to help Charlotte respond to a community crisis, CBI has evolved from a crisis-inspired response into a permanent, trusted community resource in the long-term work of achieving inclusion and equity across Charlotte-Mecklenburg.

CBI believes that a person’s identity and zip code should not predict life outcomes. If race, gender, economic status or neighborhood can predict one’s educational success, economic stability or fair treatment in the justice system, we are not building a community in which equity is a value and a priority. CBI’s work supports and aligns directly with the City’s Racial Equity Initiative, intended to “produce equitable access, opportunities, treatment and outcomes for Charlotte’s communities of color”.

### Agency Established

2004

### Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$50,00	\$50,000	\$0

### Total years financial partner with City of Charlotte

18 years

### FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Equip representatives of public, non-profit and for-profit organizations to develop a shared equity lens to consider issues of racial, social, historic, and economic justice and to establish solid connections that can be leveraged to positively impact the City’s quality of life.	Percentage of LEC participants who rate the program’s effectiveness in increasing their ability to develop and apply an equity lens as <i>good</i> or <i>excellent</i>	75%	New Target	TBD – program launch delayed
Support emerging leaders as advocates for inclusion and equity by increasing their awareness, developing and enhancing their leadership skills and connecting them with one another and community issues as well as with the City’s past, present and future, in order to build a robust network of engaged, effective and educated leaders.	1) Number of LU40 participants per class	1) 35-40%	1) 40	1) 41%
	2) Percentage of LU40 participants who rate their experience as <i>valuable</i> or <i>very valuable</i>	2) 75%	2) 100%	2) 100%
	3) Percentage of LU40 participants who indicate they have increased understanding and skills for addressing community issues	3) 75%	3) 84%	3) 89%

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Engage a diverse spectrum of residents in real-time opportunities and promote dialogue to build connections across difference and raise awareness, increase understanding and promote action and response to equity issues.	1) Number of community engagement offerings (Equity Impact Circle sessions, Community Bus Tours, other facilitated dialogues and conversations offered alone or in partnership with other organizations)	1) 20-25	1) 74	1) 45
	2) Percentage, on average, of participants and partners in these community engagement offerings who rate their experience as <i>valuable</i> or <i>very valuable</i>	2) 75%	2) 87%	3) 80%

### Population Served

CBI does not provide direct services but rather equips people and organizations with the knowledge, skills and courage to fight bias, remove barriers to opportunity and build a more equitable and just Charlotte-Mecklenburg within the services and the leadership they provide. Organizations that CBI partners with and supports through its program delivery include the City of Charlotte and Mecklenburg County, along with Charlotte Mecklenburg Library, Charlotte Mecklenburg Schools, CMPD, Atrium Health, Novant Health, MEDIC and the Arts & Science Council, all of which serve and provide services in and/or to people in under-represented communities.

### Council Priority Area(s)



### Describe the activities that will be supported through requested city funding:

In FY25 CBI will continue to engage, educate and equip individuals, organizations and community partners to advance and increase access, inclusion and equity, thereby supporting the City of Charlotte’s overall vision of being a community that opens its arms to a diverse and inclusive community of residents, businesses, and visitors alike; a safe family-oriented city where people work together to help everyone thrive. Specifically, CBI’s mission and programs have a direct relationship to the priorities outlined in the focus areas of Safe Communities, Great Neighborhoods and Well-Managed Government.

City funding will support programming that aligns with CBI’s serve three strategic purposes: DEVELOPING LEADERS, CONNECTING COMMUNITY and ADVANCING EQUITY.

#### DEVELOPING LEADERS

##### Leadership for Equity Capacity (LEC)

The LEC program is an intensive 10-month experience intended to enable nonprofit, corporate, and public sector professionals to assess the state of their practice, recognize and understand underlying issues of representation and inclusion, and lead or support their institution’s growth by building a collaborative vision. It is designed to engage participants in cultivating a shared equity lens to consider issues of racial, social, historic and economic justice, and challenge commonly-held definitions of leader and leadership. LEC is a co-created experience, expanding how accountable leadership is developed through empathy, creativity, collaboration, accountability, and design thinking. The iterative and interactive learning agenda includes Development and support for ethical leadership frameworks; Policy guidelines for emergent affinity groups; Reframing generational relations; Equity frameworks for internal and external employee development; Noticing external and internal power dynamics in

systems. This program is a demographically representative community leadership experience involving people from various cultural and linguistic backgrounds, closely connected to historically underrepresented neighborhoods in Charlotte, who bring a unique lens to inclusion, access and equity.

Leaders Under 40 (LU40) connects a diverse, cross-sector group of emerging and established leaders to increase their commitment and capacity to take a more active role in issues that impact Charlotte's present and future. LU40 Class 13 is currently underway, bringing the total number of LU40 participants/alumni to almost 600. Class 14 will be recruited and launched in late FY24/early FY25. CBI is committed to engaging individuals from additional City departments to increase the network of LU40 leaders that work within and serve the City.

## CONNECTING COMMUNITY

### Community Bus Tours

Since 2011 CBI has been using its bus tour program as a real-time interactive engagement offering. CBI Bus Tours explore how race and ethnicity have impacted key decisions in economic growth and neighborhood development, as well as "what's in the ground" as a result of these decisions and how these decisions are impacting our community's present and future. The Bus Tours function as civic engagement laboratories that allow participants to explore how issues of inclusion and equity are playing out in Charlotte and elevate the importance of equitable place-making. CBI Bus Tours increase understanding of the city's history and raise awareness about current challenges and opportunities in creating vibrant and diverse neighborhoods and incorporate the City's Quality of Life data to stimulate response. CBI's Bus Tours are being consistently utilized within City departments to educate and equip people who are providing essential services within our increasingly diverse and changing community. We anticipate that opportunities to utilize CBI Bus Tours for engagement and learning within the City will continue in FY25.

### Community Builders Breakfast (formerly Stakeholders Breakfast)

Each December CBI convenes its key stakeholders and community partners to celebrate and highlight the work and people of CBI and to offer opportunities for learning, connection, challenge and inspiration around a compelling theme. This CBI community program has continued to grow in size and reach each year, bringing together an increasingly diverse and cross-sector group of individuals and organizations. The City of Charlotte is an active and on-going participant in this annual event, which was held in FY24 on December 8, 2023. The theme "Community Building is a Verb" attracted more than 400 registrants to wrap up CBI's 25th Anniversary. CBI's 2024 Community Builders Breakfast is tentatively planned for Friday, December 13.

## ADVANCING EQUITY

CBI's intentional focus on equity promotes equity as a community value and advances understanding of how structural exclusion and inequity are impediments to all. CBI's framework exploring Resources, Rules, Stories and People is designed to increase participants' capacity to ACKNOWLEDGE how outcomes are shaped by structures that benefit some and burden others; to develop tools and accompanying skills to ANALYZE equity issues; and to increase skill and commitment to strategize about interventions and ACT in response.

In FY25 CBI will continue to expand and refine the tools and resources available in its Equity Toolkit. Current offerings in the Equity Toolkit include videos and an Equity 101 Session to support dialogue in various settings, as well as CBI's Equity Impact Circles. Through these resources, CBI will provide individuals and organizations like the City and its financial partners with practical support for increasing their understanding of how communities of color, under-represented communities and low-income communities are burdened by inequities and how these barriers can be decreased by people and organizations through intentional personal and organizational action within their areas of influence.

### Equity Impact Circles

Equity Impact Circles (EICs) engage groups of 10-16 people in five sessions supported by trained moderators. Provocative content-rich videos and other resources illuminate concepts connected to equity and explore systemic and structural inequities. Participants engage in dialogue on structures and strategies rather than simply sharing personal reactions to current events and issues. Through Equity Impact Circles people develop a deeper understanding about equity and inequity, and groups and organizations can begin to develop an equity lens to

examine any relevant issue. The City’s goals for Safe Communities, Great Neighborhoods and Well-Managed Government are aligned with these discussions, engagement and analysis.

In FY25 CBI will offer 5-8 circles in various sectors throughout the community. These will be a combination of community-based groups, groups offered in collaboration with other community partners, and engagement experiences contracted by companies and organizations. CBI will leverage its network of connections and alumni to advance this program and the issues it examines, including those of consequence to the City and the Mayor’s Racial Equity Initiative. CBI is also prepared to partner with the City’s DEI Strategy & Program Manager to build on the foundation laid by previous EIC cohorts that involved City employees with a goal of offering this opportunity more broadly within City departments going forward.

**Charlotte Equity Impact Fellows**

The Charlotte Equity Impact Fellowship nurtures and cultivates community organizing infrastructure in the most fragile corridors in greater Charlotte. Each fellow builds their relational capacity by cultivating grassroots relationships, and they track and cross-reference these relationships to understand how to create connectivity in the Westside and East Charlotte, understand the experience of those most impacted, plan together, and share resources with each other and the community. The selected fellows are Charlotte residents who have demonstrated commitment to community advocacy. They build very intentional skills around:

- Racial equity and understanding systemic oppression; utilizing City of Charlotte dashboard and national planning tools like G.A.R.E.;
- Root-cause analysis and understanding racial and systemic issues through policy and practice;
- Participatory budgeting and collaboratively building regional and local policy through community-led input;
- Collaborative planning of events: co-designing with community members, utilizing vendors of color, and accessible marketing.

**FY2025 Performance Measures and Targets**

Strategic Priority	Objective	Measures	Target
Safe Communities	Equip representatives of public, non-profit and for-profit organizations to develop a shared equity lens to consider issues of racial, social, historic, and economic justice and to establish solid connections that can be leveraged to positively impact the City’s quality of life.	Percentage of LEC participants who rate the program’s effectiveness in increasing their ability to develop and apply an equity lens as good or excellent	75%
Safe Communities	Support emerging leaders as advocates for inclusion and equity by increasing their awareness, developing and enhancing their leadership skills and connecting them with one another and community issues as well as with the City’s past, present and future, in order to build a robust network of engaged, effective and educated leaders.	1) Number of LU40 participants per class 2) Percentage of LU40 participants who rate their experience as valuable or very valuable 3) Percentage of LU40 participants who indicate they have increased understanding and skills for addressing community issues	1) 35-40 2) 75% 3) 75%
Safe Communities	Engage a diverse spectrum of residents in real-time opportunities and promote dialogue to build connections across difference and raise awareness, increase understanding and promote action and response to equity issues.	1) Number of community engagement offerings (Equity Impact Circle sessions, community Bus Tours, other facilitated dialogues and conversations offered alone or in partnership with other organizations) 2) Percentage, on average, of participants and partners in these community engagement offerings who rate their experience as valuable or very valuable	1) 20-25 2) 75%

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Safe Communities	CBI programs/trainings/ consultations focus attention on and support participants to take action to address equity issues (leadership development, community engagement, other)	Number of CBI programs/ trainings/consultations offered to focus attention on and take action to address equity issues (leadership development, community engagement, other)	25
Safe Communities	CBI programs/trainings/ consultations focus attention on and support participants to take action to address equity issues (leadership development, community engagement, other)	Number of participants in CBI programs/trainings/ consultations offered to focus attention on and take action to address equity issues (leadership development, community engagement, other)	1,200
Safe Communities	CBI programs/trainings/ consultations focus attention on and support participants to take action to address equity issues (leadership development, community engagement, other)	Percentage of participants in CBI programs who self-report more awareness and understanding of equity issues	85%
Safe Communities	CBI programs/trainings/ consultations focus attention on and support participants to take action to address equity issues (leadership development, community engagement, other)	Percentage of participants in CBI programs who self-report increased skills and capacity for taking action to address equity issues	60%

# Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Payroll fees	\$ 2,590	\$ 3,000	\$ 3,500	\$ -	0.0%
Staff Salaries & Benefits	\$ 403,541	\$ 464,778	\$ 499,636	\$ -	0.0%
Professional Development	\$ 1,602	\$ 14,850	\$ 5,000	\$ -	0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 407,732</b>	<b>\$ 482,628</b>	<b>\$ 508,136</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Programs &amp; Projects</b>					
Leaders Under 40	\$ 37,568	\$ 45,000	\$ 45,000	\$ 10,000	22.2%
Leadership Development Initiative	\$ 58,064	\$ 16,000	\$ -	\$ -	0.0%
Leadership for Equity Capacity (pilot)	\$ 1,253	\$ 15,000	\$ 20,000	\$ 5,000	25.0%
Community Bus Tours	\$ 22,556	\$ 25,000	\$ 35,000	\$ 10,000	28.6%
Community Sponsorships	\$ 1,000	\$ 1,000	\$ 1,000	\$ -	0.0%
25th Anniversary Programs	\$ -	\$ 25,000	\$ -	\$ -	0.0%
Equity Impact Circles	\$ 416	\$ 2,000	\$ 3,500	\$ 1,000	28.6%
Stakeholders/Community Builders Breakfast	\$ 50,810	\$ 75,000	\$ 75,000	\$ 10,000	13.3%
Black Wall Street Project	\$ 10,000	\$ -	\$ -	\$ -	0.0%
Charlotte Equity Impact Fellows	\$ 53,130	\$ 92,000	\$ 92,000	\$ -	0.0%
Silver Line ETOD Policy & Implementation Study	\$ -	\$ 36,504	\$ 70,134	\$ -	0.0%
Mayor's Racial Equity Initiative	\$ -	\$ 82,415	\$ 67,715	\$ -	0.0%
<b>Subtotal Program Expenses</b>	<b>\$ 234,795</b>	<b>\$ 414,919</b>	<b>\$ 409,349</b>	<b>\$ 36,000</b>	<b>8.8%</b>
<b>Operating</b>					
Search Process (New E.D.)	\$ 21,704	\$ -	\$ -	\$ -	0.0%
Communications & Marketing	\$ 40,785	\$ 21,000	\$ 25,000	\$ 2,000	8.0%
Development	\$ 12,000	\$ -	\$ -	\$ -	0.0%
Insurance	\$ 3,910	\$ 5,000	\$ 7,500	\$ -	0.0%
Office Operations & Equipment	\$ 21,343	\$ 23,500	\$ 27,500	\$ 2,500	9.1%
Organizational Governance & Support	\$ 14,913	\$ 10,000	\$ 15,500	\$ 2,500	16.1%
Rent & Staff Parking	\$ 46,117	\$ 45,500	\$ 48,500	\$ 5,000	10.3%
Technology & Website	\$ 8,462	\$ 7,500	\$ 10,000	\$ 2,000	20.0%
Future Fund	\$ -	\$ 12,500	\$ -	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 169,235</b>	<b>\$ 125,000</b>	<b>\$ 134,000</b>	<b>\$ 14,000</b>	<b>10.4%</b>
<b>Total Expenditures</b>	<b>\$ 811,763</b>	<b>\$ 1,022,547</b>	<b>\$ 917,517</b>	<b>\$ 50,000</b>	<b>5.4%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 62,500	\$ 430,632	\$ 235,676
Mecklenburg County Funding	\$ 25,000	\$ 25,000	\$ 35,000
Foundation Grants & Funding	\$ 119,544	\$ 120,000	\$ 120,000
Donor Contributions	\$ 393,301	\$ 395,000	\$ 406,841
Service Fees (Earned Income)	\$ 122,629	\$ 107,500	\$ 120,000
Other Revenue	\$ 8,200	\$ -	\$ -
<b>Total Revenues</b>	<b>\$ 731,174</b>	<b>\$ 1,078,132</b>	<b>\$ 917,517</b>

## Current Board of Directors

Cathy Armstrong	Jeep Bryant	Carola Cardenas
Sarah Degnan	Ron Turner Diaz	Ray Feaster
Sara Garces Roselli	Caroline Griffin	Claudette Grose
Steven Johnson	Joshua Lanning	Troy Leo
Witnie Martinez	Diane McAfee	Rick McDermott
Justin Perry	Liana Prinsloo	Derrick Ramos
Sean Robinson	Osei Sencherey	Lacey Williams
Keva Womble	Marth Yesowitch	Eugene Young

# FY 2025 Financial Partner Agency Summary

Agency Name: **For The Struggle, Inc.**

## Agency Description

For The Struggle ("FTS") is a black led non-profit based on Charlotte's historically black corridor- the Beatties Ford Road Corridor. FTS's focus areas are: (1) the Community Response Team- tasked with responding to needs identified by members of the community; (2) The Eatmon Project (formerly known as the Youth Impact Project)- tasked with educating and engaging youth about the electoral process and the importance of voting; and (3) The SaluteU Project- tasked with providing education and resources to youth involved with the criminal system or engaging in activities that tend to lead to involvement with the criminal system.

## Agency Established

2019

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$100,000	\$100,000	\$0

(FY 2024 ARPA Funded)

## Total years financial partner with City of Charlotte

1

## FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Service senior citizens by providing resources and services to help them preserve existing affordable housing while simultaneously working to preserve the history and culture of predominately black neighborhoods faced with displacement due to the rapid growth and gentrification occurring in Charlotte.	1) Completed critical home repairs 2) Completed future planning documents 3) Completed property tax relief applications 4) Feed seniors twice per week 5) Educate seniors and family about future financial planning	1) 30 2) 75 3) 50 4) 115 5) 200	N/A	1) 18 2) 30 3) 54 4) 108 5) 210
Build workforce talent through the SaluteU program that works with youth who are either already involved with the criminal system or are engaging in activities that tend to lead to involvement with the criminal system.	# youth deterred from criminal system	20	N/A	17

## Population Served

For The Struggle is requesting operating support for its Elder Response Initiative and its SaluteU Project. First, the Elder Response Initiative serves seniors throughout the City. FTS has a specific focus on seniors in historically and predominately black neighbors to provide equitable solutions to housing and food insecurity issues.

In 2023, FTS served more than 285 seniors and delivered the following free services through its Elder Response Initiative:

- (1) Served 201 seniors through its Senior Feeding Program- delivering to them a healthy cooked meal and fresh fruits and vegetables twice a week;
- (2) Completed more than 98 critical home repairs and environmental friendly upgrades to 37 senior citizens' homes;
- (3) Completed 47 estate/future planning documents for senior citizens;
- (4) Saved 54 senior citizens approximately \$35,000 total in property taxes through its Property Tax Relief Program;
- (5) Assisted more than 50 seniors with other needs such as yard work, outdoor cleaning, trash services, Assistance with activities of daily living, and more.

During its most recent Senior Service Day on MLK Day 2024, FTS assisted 29 seniors with yard and housework with the help of 96 volunteers, both youth and adults from the City of Charlotte. Second, the SaluteU Program services youth involved with the criminal system or engaging in activities that tend to lead to involvement with the criminal system. To date, FTS has assisted 18 youths. FTS continues to partner with West Charlotte High School, North Mecklenburg High School, DJJ and DSS

## Council Priority Area(s)



## Describe the activities that will be supported through requested city funding:

The City's funding will support operating expenses for the Elder Response Initiative and the SaluteU Program.

Operating expenses include: (1) salary for the Elder Response Initiative team members- \$50,000.00 of the \$100,000.00 request; (2) salary for Deputy Director that manages all bookkeeping and accounting relative to Elder Response Initiative (e.g. e.g. invoicing, payment, contract fulfillment, preparing and analyzing financial statements and records and more)- \$12,500.00 of the \$100,000.00 request; (3) salary for Executive Director responsible for oversight and proper execution of both programs- \$12,500.00 of the \$100,000.00 request and (3) Salary for SaluteU Program Director- \$25,000.00 of the \$100,000.00 request.

The activities of the Elder Response Initiative are providing: (1) free future planning (e.g. wills, trusts, Powers of Attorney, financial education to families); (2) free assistance with applying for property tax relief; (3) free critical home repairs; (4) access to legal representation for property-related issues; (5) free healthy cooked meals and groceries for seniors living on the Beatties Ford Road Corridor; (6) free environmental friendly upgrades to seniors' homes to reduce utility costs and simultaneously address system environmental injustices in historically black communities; and (7) assistance with Activities of Daily Living such as taking medication, taking out trash, yard work and more.

The activities of the SaluteU Program are providing the following services to youth participants: (1) A "Changed Action Plan" or CAP- 12-month plan outlining the youth's plan to change his/her actions along with the youth's career and financial goals; (2) Weekly courses on conflict management, financial planning and career readiness; (3) Free boxing classes twice a week at Stokes Boxing Academy; (4) Assigned mentor with past involvement with the criminal system; (5) Employment opportunities paying \$20.00 per hour; (6) Access to SaluteU Program attorneys as needed; and (7) Therapy and mental health services as needed.

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
<b>Great Neighborhoods</b>	Service senior citizens by providing resources and services to help them preserve existing affordable housing while simultaneously working to preserve the history and culture of predominately black neighborhoods faced with displacement due to the rapid growth and gentrification occurring in Charlotte.	1) Completed critical home repairs 2) Completed future planning documents 3) Completed property tax relief applications 4) Feed seniors twice per week 5) Educate seniors and family about future financial planning	1) 40 2) 50 3) 50 4) 200 5) 200
<b>Safe Communities</b>	Build workforce talent through the SaluteU program that works with youth who are either already involved with the criminal system or are engaging in activities that tend to lead to involvement with the criminal system.	# youth deterred from criminal system	20

## Overall Agency Budget

	Expenditures FY 2023- FY 2025				Percent city request of overall budget
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	
<b>Personnel</b>					
Salaries	\$ 428,000	\$ 588,450	\$ 600,219	\$ 100,000	16.7%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 18,000	\$ 19,200	\$ 20,000	\$ -	0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 446,000</b>	<b>\$ 607,650</b>	<b>\$ 620,219</b>	<b>\$ 100,000</b>	<b>16.1%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 20,000	\$ 20,000	\$ 20,400	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 20,000	\$ 32,000	\$ 32,640	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 22,500	\$ 22,500	\$ 22,950	\$ -	0.0%
Office Supplies	\$ 10,000	\$ 30,000	\$ 30,600	\$ -	0.0%
Travel & Training		\$ 86,200	\$ 88,000	\$ -	0.0%
Technology	\$ 2,500	\$ 2,500	\$ 2,550	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 75,000</b>	<b>\$ 193,200</b>	<b>\$ 197,140</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Total Expenditures</b>	<b>\$ 521,000</b>	<b>\$ 800,850</b>	<b>\$ 817,359</b>	<b>\$ 100,000</b>	<b>12.2%</b>

	Revenues		
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ 296,686	\$ 182,074	\$ 650,000
Foundation Grants & Funding	\$ 954,750	\$ 1,081,537	\$ 1,200,000
Donor Contributions	\$ 72,055	\$ 60,000	\$ 75,000
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 3,428	\$ -	\$ -
<b>Total Revenues</b>	<b>\$1,326,919</b>	<b>\$ 1,323,611</b>	<b>\$ 1,925,000</b>

## Current Board of Directors

Kayla Loney, Chairperson  
Tiffany Fant  
Dr. Austrai Bradley,  
Secretary

Rayon Boxx, Treasurer  
Erin Johnson  
Kathleen Lockwood,  
Esq.

Ricky Watson, esq.  
Charles Hands, Esq.

Derrick Walker  
Elliot Dolby-Shields, Esq.

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# FY 2025 Financial Partner Agency Summary

## Agency Name: **Greater Enrichment Program**

### Agency Description

GEP was founded in 1975 by Bishop George E. Battle, Retired Senior Bishop of the AME Zion Church and has operated for 48 years. The program has served more than 15,000 students since its inception. GEP provides a free high-quality academic enrichment afterschool and summer program for students that attend five underperforming elementary schools in Charlotte. GEP's programs are held on the school campus and transportation is provided home. GEP's holistic program offers a balance of academic support, SEL(social and emotional learning ) and family engagement. Each site operates Monday- Friday every day that school is in session and has large family engagement program that includes parent workshops and monthly family engagement nights. The program provides an additional three hours of learning time for students daily. All GEP students engage in a plethora of academic, and cultural enrichment activities including Literacy, STEM, art, technology, fitness, project-based learning, community service projects, and field Trips. The organization partners with more than 30 businesses and organizations including Read Charlotte Arts+, Clayworks, Girl Scouts Hornets Nest Council, Davis Tennis Foundation, Discovery Place, Money Magnets Club and Charlotte Youth Ballet. The summer program operates for six weeks in the summer and is focused on preventing summer learning loss. GEP provides a safe space for school age youth during the critical hours of 3-6pm. GEP remains committed to helping close the achievement gap in our city.

### Agency Established

1975

### Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$200,000	\$200,000	\$0

### Total years financial partner with City of Charlotte

31 years

### FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Provide a safe afterschool academic enrichment program for elementary aged students between the critical hours of 3pm and 6pm Monday through Friday	Enrollment Forms Registration Rosters	<b>New Target</b> 300	189	302
Engage families in a variety of meaning family engagement activities including family nights and parent workshops	Monthly Family Engagement Night Events Sign in Sheets Parent Workshop Sign in Sheets	<b>New Target</b> 50% % of families will attend at least five events	N/A	55%
Ensure that students are attending the program on a consistent basis.	<b>New Measure</b> Daily Attendance Logs Enrollment Roster	60% of students enrolled in the program will attend 80% of the time	N/A	77%
Increase the academic achievement of 3 <sup>rd</sup> - 5 <sup>th</sup> grade students in ELA and math subjects	Report Cards	50% of GEP Students will increase their ELA and Math grades from 1 <sup>st</sup> - 4 <sup>th</sup> quarter	51%	51.5% of students across all grades achieved A/B Honor Roll

## Population Served

The Greater Enrichment Programs direct population are elementary students and families that reside in Charlottes at-risk communities. Ninety percent of the students currently served by GEP are African American or Hispanic. The programs target enrollment for FY25 is 300 elementary aged K-5th grade students. GEP exceeds enrollment annually and has a wait list. The Greater Enrichment Program works closely with Charlotte Mecklenburg Schools and the NC Department of Instruction to identify school communities of need. GEP aligns with local community partners including Read Charlotte to support Charlottes underrepresented youth and help close the achievement gap. GEP specifically targets schools that have been identified as Title 1 to provide both afterschool and summer programs. School partners are instrumental in ensuring that the most at- risk are enrolled in the programs. This includes students that are underperforming, need social and emotional support or need a safe space to go after school.

## Council Priority Area(s)



## Describe the activities that will be supported through requested city funding

The city funding requested will be used to support 300 free afterschool and summer camp enrollment slots at Greater Enrichment Program’s sites. GEP operates in five GEP elementary school sites. The program operates Monday through Friday every day school is in session. The program hours are immediately after school from 3-6pm. The program operates from 8-4pm for six weeks in the summer and host a before school program from 7am-9am at the Niner University Elementary School location. The GEP daily schedule includes a healthy supper, homework support, indoor/ outdoor fitness, social emotional learning check in, Learning Zones and Teacher Directed Activities (TDA's). GEP students engaged in Wacky Wednesday and Fun Friday enrichment activities with facilitators from community partnership or programing vendors. GEP students engage in the “GEP Experience” that includes a plethora of academic learning and project-based learning activities including a Novel Showcase, Winter Entrepreneurship Café and the Geometric City project. GEP students in Kindergarten through 3rd grade engaged in a evidence based literacy curriculum and tutoring program in partnership with Read Charlotte a community wide literacy initiative. GEP’s motto is “Child Focused Family Centered” and also includes a vast array of family engagement opportunities to include monthly family nights, parent workshops and a parent advisory board. GEP’s goals and successes include:

- Providing a safe, no cost, high quality afterschool enrichment program to families.
- Closing the achievement gap by providing a quality academic curriculum
- Building positive self-esteem and character in students participants
- Exposing students to a variety of cultural enrichment experiences.
- Encouraging civic engagement so that students give back to their community
- Strengthening family relationships by engaging parents in quality programs to support sustainability

All GEP’s program are offered at no cost and transportation is also provided home each day. Afterschool programs are essential to the Charlotte community.

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Safe Communities	Provide a safe afterschool academic enrichment program for elementary aged students between the critical hours of 3pm and 6pm Monday through Friday, Program will be held in Charlottes most vulnerable communities.	Enrollment Forms Registration Rosters	300 students enrolled

Strategic Priority	Objective	Measures	Target
Safe Communities	Engage families in a variety of meaning family engagement activities including family nights and parent workshops	Monthly Family Engagement Night Events Sign in Sheets Parent Workshop Sign in Sheets	50% of families will attend at least five events
Safe Communities	Prevent truancy and ensure that students are attending the program on a consistent basis	Daily Attendance Logs Enrollment Roster	60% of students enrolled in the program will attend 80% of the time

### FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Safe Communities	Provide free high quality out of school time programming in low income, communities of color and underrepresented communities in the city of Charlotte.	GEP will operate five afterschool and summer programs in Charlotte Mecklenburg Elementary Schools and NC Public Charter Schools that have identified as Title I.	300 Students enrolled
Safe Communities	Partner with local community organizations and small businesses that are owned or led by women or minorities	GEP will collaborate with ten minority own business or community organizations to support and expose students to diversity in the community	Establish 5 new partnerships
Safe Communities	Provide professional development for staff that focus on diversity	Ensure that staff engage in professional development that address and support equity in education	Host two staff trainings or PD sessions

# Overall Agency and Program Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 735,449	\$ 791,454	\$ 810,204	\$ 18,928	2.3%
Payroll Tax Expense	\$ 55,072	\$ 60,546	\$ 61,981	\$ 1,448	2.3%
Benefits	\$ 60,525	\$ 65,200	\$ 65,200		0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 851,046</b>	<b>\$ 917,200</b>	<b>\$ 937,385</b>	<b>\$ 20,376</b>	<b>2.2%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing, cell)	\$ 9,974	\$ 13,500	\$ 13,500	\$ -	0.0%
Landline Phone and Internet	\$ 7,076	\$ 6,000	\$ 6,000	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 29,378	\$ 29,932	\$ 29,932	\$ 8,000	26.7%
Maintenance & Repair Building & Equipment	\$ 17,396	\$ 20,000	\$ 20,000	\$ 20,000	0.0%
Office Supplies (and Xerox rental)	\$ 29,453	\$ 28,000	\$ 28,000	\$ 10,000	35.7%
Payroll and bank fees	\$ 8,806	\$ 8,500	\$ 8,500	\$ -	0.0%
Licensing Fee	\$ 852	\$ 850	\$ 850	\$ 850	0.0%
Meeting Expense	\$ 1,635	\$ 1,600	\$ 1,600	\$ 1,600	0.0%
Audit	\$ 7,500	\$ 7,500	\$ 7,500	\$ 7,500	0.0%
Travel & Training	\$ 12,377	\$ 5,000	\$ 5,000	\$ -	0.0%
Fundraising Expense	\$ 4,546	\$ 5,500	\$ 5,500	\$ 5,500	0.0%
Educational Materials & Activities	\$ 114,479	\$ 110,000	\$ 110,000	\$ 62,098	0.0%
Food	\$ 11,536	\$ 11,000	\$ 11,000	\$ 1,260	0.0%
Program Insurance	\$ 17,551	\$ 18,970	\$ 18,970	\$ 18,970	0.0%
Employee recruitment & background checks	\$ 7,510	\$ 8,000	\$ 8,000	\$ -	0.0%
Transportation (Repairs & fuel & auto insurance)	\$ 37,552	\$ 48,346	\$ 44,346	\$ 36,346	0.0%
Employee/Volunteer/parent Recognition	\$ 8,752	\$ 7,500	\$ 7,500	\$ 7,500	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 326,374</b>	<b>\$ 330,198</b>	<b>\$ 326,198</b>	<b>\$ 179,624</b>	<b>55.1%</b>
<b>Total Expenditures</b>	<b>\$ 1,177,420</b>	<b>\$ 1,247,398</b>	<b>\$ 1,263,583</b>	<b>\$ 200,000</b>	<b>15.8%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 768,242.00	\$ 746,639.00	\$ 746,639.00
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ 83,216.45	\$ 85,000.00	\$ 85,000.00
Donor Contributions	\$ 315,707.55	\$ 215,759.38	\$ 231,944.26
Service Fees	\$ -	\$ -	\$ -
Read Charlotte Grant	\$ 59,701.00	\$ -	\$ -
Other Revenue-City Partner Grant	\$ 200,000.00	\$ 200,000.00	\$ 200,000.00
<b>Total Revenues</b>	<b>\$ 1,426,867.00</b>	<b>\$ 1,247,398.38</b>	<b>\$ 1,263,583.26</b>

## Current Board of Directors

Lyndon Abrams	Harvey Gantt	J. Parrish McCormack
Kirsten Ashford	Peter Gilchrist, III	Marty McCarthy
Bishop George E. Battle, Jr.	Mike Griffin	Jason Oneil
Rhonda M. Bethea	Hillis E Haygood II	Pete Poillon
Candy Bing	Carol Cuthbertson Hamrick	Russell Robinson
Elizabeth Brodie	Austin Helms	Dr. Wilhelmenia Rembert
Harvey Gantt	Judge Donnie Hoover	Alex Salgado
Rennie Cuthbertson	Janice Jones	David A. Williams
Charlie Davidson	Ken Loeber	Dr. James Woodward

# FY 2025 Financial Partner Agency Summary

Agency Name: **My Brother’s Keeper Charlotte-Mecklenburg County**

## Agency Description

MBKCLTMECK is a purpose-driven agency committed to improving outcomes for boys and young men of color between the ages of 12 and 22. Structured around three central Portfolios and supported by comprehensive data, the agency collaborates with a network of cross-sector partners to create a collective impact in the Charlotte-Mecklenburg community. Additionally, MBKCLTMECK extends its expertise to assist non-profit organizations in strategically planning and implementing data support strategies, along with marketing initiatives to effectively tell the story of their impact

## Agency Established

February 18, 2020

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$50,000	\$300,000	\$250,000

## Total years financial partner with City of Charlotte

4 years

## FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Support the development of youth programming in neighborhoods in the city of Charlotte.	# of entities served by partnership database	30	6	30
Support the development of youth programming in neighborhoods in the city of Charlotte.	Satisfaction rating from entities served	80% satisfaction rate	<b>New Measure</b>	93%
Support the development of youth programming in neighborhoods in the city of Charlotte.	# of students in youth database	1,000 students	50	631

## Population served

The direct population served by My Brother's Keeper Charlotte-Mecklenburg (MBKCLTMECK) encompasses all families of #CharlotteYouth, with a specific and intentional focus on boys and young men of color, particularly those in the corridors of opportunity. The agency operates with the fundamental belief that by strengthening and preparing the entire ecosystem to meet the vast needs of #CharlotteYouth, our boys and young men of color will be better equipped for success. MBKCLTMECK recognizes that the challenges faced by boys and young men of color are often interconnected with broader systemic factors. Therefore, the agency's initiatives extend beyond individual support to engage with and enhance the overall community ecosystem. By fostering a more supportive and inclusive environment for all #CharlotteYouth, MBKCLTMECK aims to create a foundation where boys and young men of color can thrive. The commitment to preparing the ecosystem involves collaboration with cross-sector partners, data-driven decision-making, mentorship programs, and real-world engagement initiatives. Through these efforts, MBKCLTMECK seeks to address not only immediate challenges but also systemic barriers, ensuring that the community is better equipped to meet the diverse needs of its youth. Ultimately, MBKCLTMECK's holistic approach reflects the belief that a well-prepared and supportive ecosystem will contribute to the positive development and success of boys and young men of color in the #CharlotteYouth community. By creating a more resilient and inclusive environment, the agency strives to empower these individuals to overcome obstacles, fulfill their potential, and contribute meaningfully to the community at large.

## Council Priority Area(s)



Safe  
Communities



Great  
Neighborhoods



Workforce & Business  
Development

### **Describe the activities that will be supported through requested city funding:**

1. In response to the pressing need to empower and prepare #CharlotteYouth for future success, My Brother's Keeper Charlotte-Mecklenburg (MBKCLTMECK) is proud to announce the establishment of the Youth Impact Office. This innovative initiative is specifically designed to target students in grades 8, 9, and 11, aiming to cultivate robust internships, apprenticeships, and other student-to-business experiences. The overarching goal of the Youth Impact Office is to increase economic mobility, social capital, and career opportunities for youth in alignment with the three E's enroll, enlist, and employ. Types of Activities:

#### Citywide Mixer Events:

The Youth Impact Mixer Series will host citywide events that transcend traditional boundaries, ensuring accessibility for youth from all corners of Charlotte. These mixers will be strategically located in various neighborhoods, providing an inclusive platform for #CharlotteYouth to connect with professionals.

#### Diverse Industry Showcases:

Each mixer will feature showcases from a variety of industries, exposing youth to the breadth of career possibilities. Professionals representing sectors such as technology, healthcare, arts, finance, and more will share their experiences, expertise, and insights, sparking curiosity and broadening horizons.

#### Interactive Workshops and Panels:

To enhance engagement and facilitate meaningful conversations, the Youth Impact Mixer Series will include interactive workshops and panel discussions. These sessions will delve into specific industries, career pathways, and the skills needed for success, providing valuable guidance to #CharlotteYouth.

#### Speed Mentoring Sessions:

Building on the success of traditional networking, the mixers will incorporate speed mentoring sessions. Youth participants will have the opportunity to engage with professionals one-on-one for brief but impactful interactions, gaining personalized advice and insights.

#### Community Partnerships and Local Businesses:

The Youth Impact Mixer Series will leverage community relations by collaborating with local businesses, educational institutions, and community organizations. By establishing partnerships with key stakeholders in each neighborhood, the mixers will become a cohesive force driving community-wide impact.

#### Career Resources and Information Booths:

Complementing the mixers, information booths will provide resources on education, career planning, and support services. Youth participants can access valuable information to make informed decisions about their future endeavors.

#### Entertainment and Networking Opportunities:

Recognizing the importance of creating an inviting atmosphere, the mixers will feature entertainment elements such as live music, artistic performances, and networking opportunities. These components aim to make the events enjoyable and memorable for both youth and professionals.

#### Social Media Campaigns and Outreach:

To maximize reach and impact, the Youth Impact Mixer Series will leverage social media campaigns to promote upcoming events, share success stories, and engage with the wider community. Online platforms will serve as an extension of the physical mixers, fostering ongoing connections.

The Youth Impact Mixer Series is envisioned as a transformative initiative that goes beyond conventional career fairs. By touring across all parts of the city and strategically leveraging community relations, this program aspires to

be a unifying force, fostering collaboration, mentorship, and a shared commitment to the success of #CharlotteYouth. Through dynamic and inclusive activities, the mixers aim to ignite the potential of the next generation, empowering them to envision and achieve their future aspirations.

2. In response to the pressing need for streamlined access to youth services, My Brother's Keeper Charlotte-Mecklenburg is proud to announce the launch of the Youth Services Connection Hotline. This innovative program is a two-way street, providing a vital link between students and families seeking assistance and a diverse array of individuals and organizations eager to contribute as valuable resources. The hotline aims to channel youth services to families in need, creating a seamless and efficient pathway for support and collaboration.

#### Addressing Gaps in Access:

Recognizing the challenges faced by families in accessing essential youth services, MBKCLTMECK is taking a bold step to bridge the gap. The Youth Services Connection Hotline is designed to serve as a lifeline, ensuring that families in need can easily access a wide range of services while also providing an avenue for individuals and organizations to actively contribute to the youth community.

#### Two-Way Communication:

Unlike traditional hotlines, this initiative fosters a two-way communication channel. Students and families seeking support can connect with the hotline to inquire about various services, ranging from educational resources and mentorship programs to mental health support and extracurricular activities. Simultaneously, individuals and organizations passionate about contributing their expertise, services, or resources to empower #CharlotteYouth can also inquire about becoming valuable contributors through the hotline.

#### Seamless Resource Matching:

The Youth Services Connection Hotline employs advanced technology to streamline the process of matching families with the most relevant and impactful services. Whether it's academic support, career guidance, or community engagement opportunities, the hotline is equipped to efficiently connect families with tailored resources that address their unique needs.

#### Inclusivity and Diversity:

Understanding the diversity of needs within the #CharlotteYouth community, the hotline is committed to inclusivity. By partnering with a wide range of service providers, organizations, and individuals, the hotline ensures that the services offered reflect the rich tapestry of the community. This commitment to diversity extends to language accessibility, ensuring that language is not a barrier to accessing vital support.

#### Community Collaboration:

The success of the Youth Services Connection Hotline hinges on collaborative efforts with local businesses, educational institutions, non-profit organizations, and community leaders. By fostering partnerships with key stakeholders, the hotline aims to create a network that strengthens the entire community, ensuring that every youth in Charlotte-Mecklenburg has access to the support they need to thrive.

#### Measuring Impact:

The impact of the Youth Services Connection Hotline will be measured through comprehensive metrics, including the number of families served, the diversity of services provided, and the satisfaction of both service seekers and contributors. Regular assessments will enable the continuous improvement of the hotline's functionality and its ability to meet the evolving needs of the community.

#### Empowering #CharlotteYouth Together:

In launching the Youth Services Connection Hotline, MBKCLTMECK envisions a community where every youth and family, regardless of their circumstances, has access to the support and resources needed for success. By fostering a culture of collaboration, inclusivity, and responsiveness, the hotline aims to be a beacon of empowerment, guiding #CharlotteYouth on their journey to a brighter and more promising future.

3. In a dedicated effort to fortify the foundation of non-profits serving #CharlotteYouth in low-income areas, My Brother's Keeper Charlotte-Mecklenburg (MBKCLTMECK) proudly introduces a transformative initiative focused on enhancing organizational effectiveness and sustainability. This program is meticulously designed to provide tailored

strategic planning support, fostering not only the growth of these non-profits but also amplifying their program impact and ensuring long-term community benefit. Aligned with the determined needs of the City of Charlotte, this initiative is poised to be a catalyst for positive change in the lives of the youth it serves.

#### Recognizing the Crucial Role of Non-Profits:

Non-profit organizations are the backbone of community support, playing a pivotal role in addressing the unique challenges faced by #CharlotteYouth in low-income areas. MBKCLTMECK, acknowledging their invaluable contributions, has embarked on a mission to empower and uplift these non-profits to new heights of effectiveness and sustainability.

#### Tailored Strategic Planning Support:

At the heart of this initiative lies the commitment to providing tailored strategic planning support. Recognizing that one size does not fit all, the program aims to work closely with each non-profit, understanding its specific goals, challenges, and the needs of the youth it serves. By tailoring strategic plans, the initiative seeks to create a roadmap for growth that is uniquely aligned with the organization's mission and the City of Charlotte's determined needs.

#### Fostering Organizational Growth:

Organizational growth is not just about expansion; it's about evolving to meet the changing needs of the community. The program empowers non-profits to identify areas of potential growth, whether it be in program offerings, outreach initiatives, or community partnerships. Through strategic planning, organizations can set realistic and achievable goals that pave the way for sustained growth.

#### Amplifying Program Impact:

The effectiveness of non-profits is measured by the impact of their programs on the lives of the youth they serve. The initiative focuses on amplifying this impact by refining program strategies, incorporating evidence-based practices, and aligning programs with the evolving needs of #CharlotteYouth. By optimizing program effectiveness, non-profits can create meaningful and lasting change in the communities they serve.

#### Long-Term Community Benefit:

The ultimate goal is to ensure long-term community benefit. The program encourages non-profits to envision their role in the community not just for the present but for the generations to come. By fostering a culture of sustainability, the initiative aims to equip organizations with the tools and strategies needed to thrive and continuously contribute to the well-being of #CharlotteYouth.

#### City of Charlotte's Determined Needs:

This initiative is not conducted in isolation. It is strategically aligned with the determined needs of the City of Charlotte, ensuring that the efforts of non-profits are harmoniously integrated into the broader vision for community development. By aligning with city priorities, the program seeks to create a collaborative and synergistic approach to addressing the multifaceted needs of #CharlotteYouth.

#### Measuring Impact and Celebrating Success:

The success of the initiative will be measured through tangible outcomes such as increased program effectiveness, organizational growth, and sustained community benefit. Through regular assessments and collaboration, MBKCLTMECK aims to create a dynamic feedback loop that ensures continuous improvement and celebrates the successes achieved by non-profits serving #CharlotteYouth.

### **If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?**

#### Youth Impact Office:

Objective: Cultivate robust internships, apprenticeships, and student-to-business experiences targeting students in grades 8, 9, and 11.

Allocation: Funding will support the establishment of the Youth Impact Office, hiring dedicated staff to coordinate internship opportunities, forge partnerships with businesses, and provide mentorship for participating students.

Impact: The Youth Impact Office aims to increase economic mobility, social capital, and career opportunities for youth, aligning with the three E's—enroll, enlist, and employ.

Youth Services Connection Hotline:

Objective: Streamline access to youth services through a two-way hotline connecting students and families with vital resources.

Allocation: Investment will cover staffing for hotline coordination, technological infrastructure, and outreach efforts to engage both service seekers and contributors.

Impact: The hotline will efficiently channel youth services to families in need, fostering collaboration with a diverse network of individuals and organizations to create a seamless pathway for support.

Non-Profit Sustainability Initiative:

Objective: Enhance the effectiveness and sustainability of non-profits serving #CharlotteYouth in low-income areas through tailored strategic planning support.

Allocation: Funds will be directed towards hiring skilled professionals to provide strategic planning support, organizational growth assistance, and program impact amplification for non-profits. Operational support will ensure the long-term community benefit aligns with the City of Charlotte's determined needs.

Impact: This transformative initiative will fortify the foundation of non-profits, ensuring they thrive, grow, and continue positively impacting the lives of #CharlotteYouth.

**FY2025 Performance Measures and Targets**

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Increase economic mobility, social capital, and career opportunities for youth.	<p>Employment Entry:</p> <p>a. Number of Youth Employed: Track the total number of youth who have successfully secured employment through the opportunities provided.</p> <p>b. Type of Employment: Categorize the types of employment opportunities, such as part-time, full-time, internships, or apprenticeships.</p> <p>Career Advancement:</p> <p>a. Promotion Rate: Measure the percentage of youth who have experienced career advancement, specifically those who have been promoted to higher positions within their respective fields.</p> <p>b. Skill Development: Assess the acquisition of new skills by monitoring the participation of youth in training programs or workshops and measuring the increase in their skill sets.</p> <p>Social Capital Development:</p> <p>a. Networking Engagement: Count the number of networking events attended by youth, emphasizing the expansion of their professional connections.</p> <p>b. Mentorship Relationships: Quantify the establishment of mentorship relationships, including the number of youth paired with mentors and the duration of these relationships.</p> <p>c. Community Engagement: Measure</p>	<p>Employment Entry: a. Number of Youth Employed: Target a 20% increase in the number of youth employed within the first year of the initiative. b. Type of Employment: Aim for at least 30% of employed youth to secure internships or apprenticeships that provide valuable hands-on experience. Career Advancement: a. Promotion Rate: Set a goal for a 15% increase in the promotion rate of participating youth over a two-year period. b. Skill Development: Target a 25% increase in the number of youth acquiring new skills through training programs within the first year. Social Capital Development: a. Networking Engagement: Aim for each participating youth to attend a minimum of three networking events per year. b. Mentorship Relationships: Set a target</p>

Strategic Priority	Objective	Measures	Target
		<p>the participation of youth in community activities, events, or volunteer opportunities, indicating their broader social involvement.</p> <p>Economic Mobility: a. Financial Literacy Improvement: Utilize assessments or surveys to measure the increase in financial literacy among youth, evaluating their ability to manage finances effectively.</p>	<p>to establish mentorship relationships for 40% of participating youth within the first year. c. Community Engagement: Strive for each youth to engage in at least two community events or volunteer opportunities annually. Economic Mobility: a. Income Growth: Target an average income growth of at least 10% for participating youth over a two-year period.</p>
Safe Communities	Channel youth services to families in need by streamlining them via hotline.	<p>Hotline Accessibility and Outreach: Indicator: Assess the extent to which the hotline is reaching diverse communities by identifying and engaging with at least three underserved populations within the first six months.</p> <p>Timely Responsiveness: Indicator: Evaluate the efficiency of the hotline in responding promptly to inquiries by ensuring that the response time is within 24 hours, enhancing accessibility for families seeking assistance.</p> <p>Client-Centered Referrals: Indicator: Measure the effectiveness of service referrals by focusing on personalized and client-centered approaches, ensuring that families are connected to tailored resources that address their specific needs.</p> <p>Culturally Responsive Services: Indicator: Assess the hotline's cultural responsiveness by gauging client satisfaction through feedback surveys, with a particular emphasis on understanding how well the services align with diverse cultural backgrounds.</p> <p>Community Engagement and Partnerships: Indicator: Evaluate the effectiveness of community partnerships by monitoring the creation and success of joint initiatives facilitated through the</p>	<p>Hotline Accessibility and Outreach: Target: Achieve engagement with a minimum of 500 families from at least three distinct underserved populations within the first six months. Timely Responsiveness: Target: Ensure that 90% of hotline inquiries receive a response within 24 hours, demonstrating efficient and timely responsiveness. Client-Centered Referrals: Target: Facilitate a 30% increase in successful and personalized service referrals made through the hotline over the course of the year. Culturally Responsive Services: Target: Attain a satisfaction rate of 85% or higher from families representing diverse cultural backgrounds through feedback surveys. Community Engagement and Partnerships: Target: Establish and successfully execute at least five joint initiatives with community partners facilitated through the hotline within the first year. Holistic Support: Target: Implement a follow-up</p>

Strategic Priority	Objective	Measures	Target
		<p>hotline, emphasizing collaborative efforts that enhance service delivery.</p> <p>Holistic Support: Indicator: Measure the holistic impact of the hotline by implementing a follow-up system that engages with families three months after accessing services, capturing qualitative insights into the sustained support provided and addressing ongoing needs.</p>	<p>system that engages with 70% of families three months after accessing services through the hotline, ensuring ongoing support and addressing persistent needs.</p>
Great Neighborhoods	<p>Enhance the effectiveness and sustainability of non-profits serving #CharlotteYouth in low-income areas by providing tailored strategic planning support that fosters organizational growth, program impact, and long-term community benefit in alignment with the City of Charlotte's determined needs.</p>	<p>Data Support: Quality of Data Utilization: Evaluate the organization's ability to effectively use data for decision-making and program improvement. Assess the extent to which data-driven insights inform strategic choices and enhance program outcomes. Capacity for Data Collection: Measure the organization's capacity to collect relevant data. This includes assessing the completeness, accuracy, and timeliness of data collection processes, ensuring a solid foundation for evidence-based decision-making. Data-Driven Innovation: Assess the organization's success in fostering a culture of innovation through data utilization. Identify instances where data has been a catalyst for innovative program approaches or improvements. Assess the depth and impact of knowledge dissemination through the publication of reports or articles. Measure the extent to which the highlighted best practices contribute to knowledge sharing and collaborative learning among organizations serving youth in #Charlotte. Evaluate the qualitative feedback received from stakeholders, including community partners, to understand the perceived value and applicability of the shared best practices.</p> <p>Fundraising and Development: Donor Engagement and Satisfaction: Evaluate the level of engagement and satisfaction among donors by assessing their feedback, understanding their motivations, and recognizing their alignment with the organization's mission.</p>	<p>Data Support: Quality of Data Utilization: Target: Achieve a 20% increase in the number of strategic decisions directly informed by data insights over the next fiscal year. Capacity for Data Collection: Ensure a 95% completeness rate in data collection processes, aiming for data accuracy and timeliness improvements by 15% within the next six months. Data-Driven Innovation: Identify and implement at least two innovative program approaches or improvements directly inspired by data-driven insights in the upcoming year. Highlighting Best Practices: Publish and disseminate a minimum of two reports or articles within the next year, highlighting best practices in serving youth in #Charlotte, based on successful data utilization and program outcomes. Fundraising and Development: Donor Engagement and Satisfaction: Achieve a 10% increase in donor satisfaction ratings based on feedback surveys conducted annually. Strategic Partnerships: Establish and formalize partnerships with at least</p>

Strategic Priority	Objective	Measures	Target
		<p>Strategic Partnerships: Measure the success of building strategic partnerships by assessing the depth and effectiveness of collaborations with donors, philanthropic organizations, and community stakeholders.</p> <p>Community Engagement: Stakeholder Inclusivity: Evaluate the inclusivity of community engagement efforts by assessing the representation and involvement of diverse stakeholders, including youth, families, and community leaders.</p> <p>Perceived Impact: Measure the perceived impact of the organization within the community by gathering feedback from beneficiaries, families, and community members. Assess how well the organization addresses the needs and aspirations of the community.</p> <p>Feedback Mechanisms: Assess the effectiveness of feedback mechanisms by evaluating the responsiveness of the organization to community input. Identify instances where community feedback has led to positive adjustments in programs or services.</p>	<p>three new strategic stakeholders, such as major donors, corporate sponsors, or community foundations, within the next year. Community Engagement: Stakeholder Inclusivity: Increase the representation of diverse stakeholders in community engagement activities by 25%, focusing on youth, families, and community leaders within the next six months.</p> <p>Perceived Impact: Achieve a 20% increase in positive feedback from beneficiaries and community members regarding the perceived impact of the organization's programs and services. Feedback Mechanisms: Implement and actively respond to feedback from at least 80% of community input, ensuring timely adjustments to programs or services based on community suggestions.</p>

**FY2025 Equity Measures and Targets**

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	<p>Equitable Access to Opportunities: Objective: Ensure that economic mobility, social capital development, and career opportunities are accessible to all youth, with a particular focus on historically marginalized and underserved communities.</p> <p>Cultural Competency in Skill Development: Objective: Enhance the cultural competency of skill development programs to ensure that they are tailored to the unique needs and backgrounds of each participating</p>	<p>Equitable Access to Opportunities: Objective: Ensure that economic mobility, social capital development, and career opportunities are accessible to all youth, with a particular focus on historically marginalized and underserved communities.</p> <p>Cultural Competency in Skill Development: Objective: Enhance the cultural competency of skill development programs to ensure that they are tailored to the unique needs and backgrounds of each participating youth.</p>	<p>Achieve a 20% increase in the participation of youth from historically marginalized communities within the first year. Quantitative Target: Incorporate cultural competency assessments into 100% of skill development programs within the next six months. Quantitative Target: Establish mentorship relationships for 50% of youth from underrepresented communities within the first year. Quantitative</p>

Strategic Priority	Objective	Measures	Target
	<p>youth.</p> <p><b>Inclusive Networking Opportunities:</b></p> <p>Objective: Promote inclusivity in networking events, ensuring that all youth, regardless of background, feel welcome and have equal opportunities to expand their professional connections.</p> <p><b>Equitable Mentorship Allocation:</b></p> <p>Objective: Ensure equitable distribution of mentorship opportunities, particularly targeting youth from underrepresented communities, to facilitate equal access to guidance and support.</p> <p><b>Financial Literacy for All:</b></p> <p>Objective: Ensure that financial literacy programs are accessible to all youth, with a focus on providing resources and support to those with limited financial knowledge or resources.</p>	<p><b>Inclusive Networking Opportunities:</b></p> <p>Objective: Promote inclusivity in networking events, ensuring that all youth, regardless of background, feel welcome and have equal opportunities to expand their professional connections.</p> <p><b>Equitable Mentorship Allocation:</b></p> <p>Objective: Ensure equitable distribution of mentorship opportunities, particularly targeting youth from underrepresented communities, to facilitate equal access to guidance and support.</p> <p><b>Financial Literacy for All:</b></p> <p>Objective: Ensure that financial literacy programs are accessible to all youth, with a focus on providing resources and support to those with limited financial knowledge or resources.</p>	<p>Target: Increase the participation of youth in financial literacy programs by 20%, with a particular emphasis on reaching those with limited financial knowledge or resources.</p>
Safe Communities	<p><b>Equitable Access to Hotline Services:</b></p> <p>Objective: Ensure that hotline services are accessible to all families, with a focus on addressing barriers faced by historically marginalized and underserved populations.</p> <p><b>Cultural Competency in Hotline Services:</b></p> <p>Objective: Enhance the cultural competency of hotline services to ensure responsiveness to the diverse cultural backgrounds of families seeking assistance.</p> <p><b>Community Input in Service Referrals:</b></p> <p>Objective: Involve the community in shaping service referrals,</p>	<p><b>Measures:</b></p> <p>Evaluate demographic representation in hotline engagement to ensure inclusivity.</p> <p>Identify and address any language or cultural barriers hindering access to hotline services.</p> <p><b>Measures:</b></p> <p>Implement cultural competency training for hotline staff.</p> <p>Monitor client satisfaction, specifically assessing the alignment of services with diverse cultural needs.</p> <p><b>Measures:</b></p> <p>Establish feedback mechanisms to gather input on service referral processes.</p> <p>Evaluate the extent to which community preferences influence service referral strategies.</p> <p><b>Measures:</b></p>	<p><b>Quantitative Target:</b></p> <p>Achieve a 20% increase in hotline engagement from historically marginalized populations within the first year. <b>Quantitative Target:</b> Achieve a 15% increase in client satisfaction rates related to cultural responsiveness within the first six months. <b>Quantitative Target:</b> Establish partnerships with at least two community organizations representing historically underserved populations within the first year.</p>

Strategic Priority	Objective	Measures	Target
	<p>ensuring that the process is collaborative and client-centered.</p> <p>Partnerships Reflecting Community Diversity:</p> <p>Objective: Foster partnerships that reflect the diversity of the community, ensuring that joint initiatives are inclusive and representative of various perspectives.</p>	<p>Monitor the diversity of community partners engaged in joint initiatives. Assess the inclusivity of joint initiatives in addressing a broad range of community needs.</p>	
Great Neighborhoods	<p>Community-Driven Development:</p> <p>Objective: Empower the community to actively participate in the development and growth of the organization, fostering a sense of ownership and shared impact.</p> <p>Equitable Stakeholder Representation:</p> <p>Objective: Increase the representation of diverse stakeholders in community engagement activities, fostering a more inclusive and representative participatory process.</p>	<p>Measures:</p> <p>Evaluate the level of community involvement in strategic decision-making processes.</p> <p>Monitor the extent to which community input influences program development and organizational direction.</p> <p>Measures:</p> <p>Track the demographic representation of stakeholders engaged in community events.</p> <p>Evaluate the inclusivity of outreach strategies targeting various demographic groups.</p>	<p>Targets: Establish community-led focus groups to contribute insights to organizational planning, ensuring representation from various community segments. Targets: Achieve a 25% increase in the representation of underrepresented youth, families, and community leaders in engagement activities within the next six months.</p>

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 170,000	\$ 225,000	\$ 375,000	\$ 245,000	65.3%
Merit	\$ 2,000	\$ 2,000	\$ 2,000	\$ -	0.0%
Benefits	\$ 36,250	\$ 36,250	\$ 42,500	\$ 7,900	18.6%
<b>Subtotal Personnel Expenses</b>	<b>\$ 208,250</b>	<b>\$ 263,250</b>	<b>\$ 419,500</b>	<b>\$ 252,900</b>	<b>60.3%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 2,000	\$ 3,000	\$ 40,000	\$ 25,000	62.5%
Communications (e.g. publishing, marketing)	\$ 2,000	\$ 5,000	\$ 15,000	\$ 10,000	66.7%
Facilities (e.g. rent, utilities)	\$ -	\$ -	\$ 12,000	\$ 7,500	62.5%
Office Supplies	\$ 500	\$ 500	\$ 500	\$ 100	20.0%
Travel & Training	\$ 1,250	\$ 3,000	\$ 4,500	\$ 3,000	66.7%
Technology	\$ 250	\$ 500	\$ 1,500	\$ 1,500	100.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 6,000</b>	<b>\$ 12,000</b>	<b>\$ 73,500</b>	<b>\$ 47,100</b>	<b>64.1%</b>
<b>Total Expenditures</b>	<b>\$ 214,250</b>	<b>\$ 275,250</b>	<b>\$ 493,000</b>	<b>\$ 300,000</b>	<b>60.9%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$38,000	\$ 75,000	\$ 100,000
Mecklenburg County Funding	\$ -	\$ 50,000	\$ 75,000
Foundation Grants & Funding	\$ -	\$ 75,000	\$ 125,000
Donor Contributions	\$10,000	\$ 10,000	\$ 25,000
Service Fees	\$ -	\$ 1,500	\$ 1,500
Other Revenue		\$ 175,000	\$ 265,000
<b>Total Revenues</b>	<b>\$48,000</b>	<b>\$ 386,500</b>	<b>\$ 591,500</b>

### If requesting funding for a specific program within your agency, please provide description of the specified program

1. In response to the pressing need to empower and prepare #CharlotteYouth for future success, My Brother's Keeper Charlotte-Mecklenburg (MBKCLTMECK) is proud to announce the establishment of the Youth Impact Office. This innovative initiative is specifically designed to target students in grades 8, 9, and 11, aiming to cultivate robust internships, apprenticeships, and other student-to-business experiences. The overarching goal of the Youth Impact Office is to increase economic mobility, social capital, and career opportunities for youth in alignment with the three E's—enroll, enlist, and employ.
2. In response to the pressing need for streamlined access to youth services, My Brother's Keeper Charlotte-Mecklenburg is proud to announce the launch of the Youth Services Connection Hotline. This innovative program is a two-way street, providing a vital link between students and families seeking assistance and a diverse array of individuals and organizations eager to contribute as valuable resources. The hotline aims to channel youth services to families in need, creating a seamless and efficient pathway for support and collaboration.
3. In a dedicated effort to fortify the foundation of non-profits serving #CharlotteYouth in low-income areas, My Brother's Keeper Charlotte-Mecklenburg (MBKCLTMECK) proudly introduces a transformative initiative focused on enhancing organizational effectiveness and sustainability. This program is meticulously designed to provide tailored strategic planning support, fostering not only the growth of these non-profits but also amplifying their program impact and ensuring long-term community benefit. Aligned with the determined

needs of the City of Charlotte, this initiative is poised to be a catalyst for positive change in the lives of the youth it serves.

## Overall Program Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 75,000	\$ 125,000	\$ 275,000	\$ 245,000	89.1%
Merit	\$ -	\$ -	\$ 2,000	\$ -	0.0%
Benefits	\$ -	\$ -	\$ 42,500	\$ 7,900	18.6%
<b>Subtotal Personnel Expenses</b>	<b>\$ 75,000</b>	<b>\$ 125,000</b>	<b>\$ 319,500</b>	<b>\$ 252,900</b>	<b>79.2%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 1,000	\$ 3,000	\$ 40,000	\$ 25,000	62.5%
Communications (e.g. publishing, marketing)	\$ 1,000	\$ 5,000	\$ 15,000	\$ 10,000	66.7%
Facilities (e.g. rent, utilities)	\$ -	\$ -	\$ 12,000	\$ 7,500	62.5%
Office Supplies	\$ 500	\$ 500	\$ 500	\$ 100	20.0%
Travel & Training	\$ 1,250	\$ 3,000	\$ 4,500	\$ 3,000	66.7%
Technology	\$ 250	\$ 500	\$ 4,000	\$ 2,500	62.5%
<b>Subtotal Operating Expenses</b>	<b>\$ 4,000</b>	<b>\$ 12,000</b>	<b>\$ 76,000</b>	<b>\$ 48,100</b>	<b>63.3%</b>
<b>Total Expenditures</b>	<b>\$ 79,000</b>	<b>\$ 137,000</b>	<b>\$ 395,500</b>	<b>\$ 301,000</b>	<b>76.1%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 38,000	\$ 75,000	\$ 100,000
Mecklenburg County Funding	\$ -	\$ 50,000	\$ 75,000
Foundation Grants & Funding	\$ -	\$ 75,000	\$ 125,000
Donor Contributions	\$ 10,000	\$ 10,000	\$ 25,000
Service Fees	\$ -	\$ 1,500	\$ 1,500
Other Revenue	\$ -	\$ -	\$ -
<b>Total Revenues</b>	<b>\$ 48,000</b>	<b>\$ 211,500</b>	<b>\$ 326,500</b>

## Current Board of Directors

Reginald Bean	Keith Cockrell
Michael DeVaul	Jorge Millares
Ken Burton	Mark Jarrell
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Anthony Trotman	
Braxton Winston	

## FY 2025 Financial Partner Agency Summary

### Agency Name: **National Institute of Minority Economic Development- The Women's Business Center of Charlotte**

#### **Agency Description**

The Institute is a uniquely positioned nonprofit organization focused exclusively on creating fair and equitable economic opportunity for minority-owned businesses and their communities. For nearly forty years, the Institute has worked to tackle racial and gender disparities in economic outcomes by improving the ecosystem for diverse-led organizations and by increasing access to capital for minority businesses and communities of color. We work within the current small business development ecosystem to open the doors and windows to equity and inclusion and fair economic opportunity.

Our programs exist within four centers, which work collaboratively:

>Our Center for Entrepreneurship provides meaningful education, training, growth strategies and technical assistance for diverse businesses. By focusing on those led and owned by Black, Latino, women, and other minorities, we support and grow key stakeholders in the small business ecosystem, stabilizing families through expanded economic opportunity and improved business value. Services include technical assistance to small business owners and aspiring entrepreneurs; workshops, seminars, and summits; strategic partnerships with HBCUs and other colleges and universities; corporate/executive education; and other capacity-building growth strategies.

> Our Research, Policy and Impact Center analyzes the root causes of racial disparities in income, wages, general economic opportunity, access, and funding allocations, and uses data to educate stakeholders of opportunities for changes in policy to create a more equitable environment for women and minority populations.

> Our CDFI, Institute Capital, provides access to capital for minority-owned small businesses and non-profit affordable housing developers, improving the financing environment with fair and equitable lending practices.

>Our Center for Strategic Partnerships, a consulting arm, leads the Institute's strategic partnerships and fee for service contracts with universities, municipalities, and corporate entities.

The Women's Business of Charlotte (WBCC) is a program of the Center for Entrepreneurship. WBCC serves women small business owners across the 12-county Charlotte Metro area. Over the past six years, our programs have touched 3,418 unique entrepreneurs in starting and growing their businesses here. From retail to construction, finance and home health, we offer TA services ranging from technology to financial health, leadership development, peer networks, and growth strategies. Our team includes Executive Director, Rocio Gonzalez, a program director and program manager. Two of our team members are fluently bilingual, enabling us to offer services in Spanish and English concurrently. On an annual basis we serve 700 women, delivering 56 programs and providing more than 400 hours in technical assistance.

As part of our ongoing service delivery, we take client feedback, economic trends, and new technology into our planning process to ensure that programs are cutting edge, relevant, and lead to real and valued small business solutions. Our financial sessions empower women entrepreneurs and small business leaders with the knowledge to understand financial language and processes. This includes profit/loss statements, supply chain, calculating overhead, planning for long-term stability and growth, as well as incorporating compensation, employee benefits and job quality goals for greater community impact.

The WBCC has relationships with a growing number of community partners and resources, including but not limited to CVMSDC, Prospera, CBI, NC Works, the Latin American Chamber of Commerce, NMBBAA, UNC Charlotte and other regional institutions. We also partner with specific business sectors and professionals who are subject matters experts such as legal, finance, accounting, human resources, leadership development, project management, and risk management bringing targeted and innovative strategies for operational efficiency and cost-savings.

Beyond our programs, we also have the ability to provide referrals to capacity-building support through our affiliated CDFI, Institute Capital (ICAP), and to additional resources within the Institute. These services include

targeted programming for business certifications and specific education around job quality and growth goals for small businesses. Partnering across our full internal umbrella, we can connect women and minority business owners to bonding, bid opportunities, diverse supplier opportunities with corporate and municipal organizations, and support vendor inclusion strategies for large business entities.

Blending B2B network development with small business education and capital access, our work encourages this full circle of local investment - building a future of opportunity for women, minorities, and disadvantaged neighborhoods through our unique and targeted approach to wealth equity.

### Agency Established

2017

### Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$50,000	\$65,000	\$15,000

### Total years financial partner with City of Charlotte

6 Years

### FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Maintain great neighborhoods by educating minority and women entrepreneurs and small businesses to strengthen their revenue and preserve their housing.	1) Total # of Biz served 2) 1:1 counseling hours 3) # Group trainings	1) 200 2) 100 3) 50	1) 374 2) 101 3) 56	1) 316 2) 209 3) 59
Provide business owners capacity building programs, workshops and 1:1 business counseling, to enhance entrepreneur Opportunities to become economically self-sufficient	1) Curriculum adjustment and deployment of 4 Business Building Capacity (BBC) Programs per Fiscal Year (9, 6, 3-month programs) 2) Curriculum adjustment and deployment of 3, 2-hour business education workshops per month	1) 4 2) 36	1) 6 2) 38	1) 12 2) 15
Provide resources, tools, mentorship, and assistance to M/WSBE & Veteran Entrepreneurs who desire to start, grow, and manage small businesses in the 12 counties WBCC footprint	1) # Of unique businesses served in the Fiscal Year 2) # Of 1:1 business counseling hours provided 3) # of Participants in BBC and workshops per year	1) 700 2) 65 3) 400	1) 1,105 2) 73 3) 834	1) 680 2) 150 3) 345
Advance equity by providing economic opportunities for all residents with a focus on the underserved community and minority women-owned businesses	1) # Of women owned businesses served 2) Demographics breakdown 3) Income breakdown	1) 630 2) 690 3) 150 LMI clients	1) 971 2) 759 3) 161	1) 680 2) 500 3) 75%

## Population Served

Our target audience are women entrepreneurs, ages 18 and up. This includes existing small business owners or those interested in starting a business. Services and education programs cover start-up to growth. Under our agreement with the SBA, the WBCC services women who are hopeful entrepreneurs or existing small business owners in Alexander, Anson, Cabarrus, Catawba, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, and Union Counties. In 2022 we served approximately 825 unique small business clients. More than 1,050 individuals attended programs and training sessions and events hosted by the WBCC. Of those total numbers we know that 86% were Black/African American, 8% Latinx, 2% Asian.

Across our programs we estimate that 80-85% of our clients are also of low-to-moderate income levels. Drawing on the demographic data above, we can extrapolate that nearly all of our clients represent socially and economically disadvantaged populations – whether that is attributed to gender, race, ethnicity, geography, or socio-economic levels. We also know that many of our clients are located in our Corridors of Opportunity zones. Our clients range from women with very small home-based businesses to those with emerging, growth-ready businesses seeking opportunities for supplier inclusion contracts. To meet all needs, we provide services that are tiered in scope, allowing us to serve any business need and for our clients to grow with us, regardless of size of business stage. In addition to technical assistance and core business development/education needs, our women business clients also share with us their desire to improve in communication, confidence, pitch practice and the need to build a stronger B2B network. To meet those qualitative needs, we intentionally build relationships and presentation confidence through cohort-based educational programming. From peer-to-peer social engagement to building relationships with professionals in legal, HR, tax and other key support services, our clients learn and grow together – often building business networks that last a lifetime.

To further provide the most robust services possible, the WBCC staff is constantly evaluating and seeking to improve our offerings. We have expanded our staff to include more fluently bilingual team members, able to offer counseling and training in Spanish and English. The WBCC staff have a strong reputation and multiple relationships within the Charlotte Hispanic community. We have signed a Memorandum of Understanding with the General Consulate of Mexico, to be their TA partner for Mexican entrepreneurs. We are also aware of the increasing number of Charlotte small business owners who are native non- English speakers outside the Hispanic community – particularly Vietnamese and Arabic. Our web-based learning management system (LMS) has curriculum in these languages as well as many others. We have worked with a consultant to have some of our other resources translated to Arabic and will continue to assess the need to expand our translation and program language needs over the coming year. Across the Charlotte area, the WBCC partners with other Institute programs such as our affiliated CDFI, Institute Capital, and our Center for Strategic Partnerships – both located on the campus of UNC-Charlotte - as well as the City of Charlotte’s Business Inclusion team, to offer an array of topics and the opportunity to increase their networks. We are open to other partnerships opportunities, to the extent that our capacity and resources allow

## Council Priority Area(s)



### **Describe the activities that will be supported through requested city funding:**

WBCC offers educational programs to meet the needs of entrepreneurs at any phase of their entrepreneurship journey – from new business starts to growth-goals and capital readiness.

We focus on three tiers:

**New starts (0-1year in operation):** These are businesses which are just emerging from ideation to launch. Entrepreneurs in this category typically require the most support.

**Emerging businesses (1-4 years):** These are businesses which are seeking stabilization, may be ready to hire or expand services, but are primarily seeking support to properly manage finances, resources, contracts, and daily management needs.

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We focus on three tiers:

New starts (0-1year in operation): These are businesses which are just emerging from ideation to launch. Entrepreneurs in this category typically require the most support.

Emerging businesses (1-4 years): These are businesses which are seeking stabilization, may be ready to hire or expand services, but are primarily seeking support to properly manage finances, resources, contracts, and daily management needs.

Growth-ready/established businesses (5+ years): These businesses are often ready to seek capital for expansion, whether that is through new sales, new staffing, or new contract opportunities, Businesses in this category most often look for capital-readiness support, loan application TA, or other supplier inclusion assistance.

Our capacity-building programs are offered in 3-to-9-month cohort-based learning models targeted to the stage of business development. Each is designed to cover appropriate business education topics that range from building a business plan, marketing strategies, financial reports, technology, and tax requirements, legal and human resource needs.. Beyond the cohort-sessions, we also offer deep-dive workshops on specific topics - from cybersecurity to Google marketing, all provided by internally certified staff or external professionals. In addition, any client can request 1:1 business counseling to further assist in their business development or business growth.

We meet start-up to growth needs for minority and woman owned small businesses. This includes access to capital, leadership, and all stages of business development. Taking workforce development one step further, we can work with those programs to also offer entrepreneur training – taking individuals from skill attainment to business ownership. This can be particularly impactful in very low-resource communities with few job opportunities and limited transportation and/or in specific high-need business or service sectors such as construction trades or ancillary medical services like medical transportation or home health. We enjoy building these types of creative partnerships with other programs to meet our shared goals and mission.

New to this year's targets is an additional objective around the transportation Strategic Priority. We are able to partner with our internal program, the Small Business Transportation Resource Center, to conduct TA and education specifically for minority and women contractors or subcontractors who are seeking to successfully secure State or US DOT contracts. With an eye towards improving infrastructure, access to safe transportation, and improving environments for low-income minority neighborhoods, this can become a growing area of impact for the WBCC further supporting the City of Charlotte's goals in return

**If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?**

The Women's Business Center of Charlotte has been funded at the same level with City of Charlotte for six years. This ongoing partnership plays an important role in our financial health.

Over the past three years however, in the post-pandemic economy, the WBCC has seen our client base and demand for services more than double. We have grown our staff to the extent that we have been able, but additional infrastructure needs - such as technology, office space that is accessible, and our own cybersecurity needs - have created significant cost increases.

We are requesting an increase for FY2025, from \$50,000 to \$65,000. This will help to offset those internal infrastructure needs, strengthen our staffing, and allow us to continue to grow to meet the needs of Charlotte Metro area Minority and Women Small Business Entities.

**FY2025 Performance Measures and Targets**

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Provide business owners capacity building programs, workshops and 1:1 business counseling, to enhance entrepreneur opportunities to become economically self-sufficient	Curriculum adjustment and deployment of 4 Business Building Capacity (BBC) Programs per Fiscal Year	Up to 12 participants per BBC program (total 48)
Workforce & Business Development	Provide business owners capacity building programs, workshops and 1:1 business counseling, to enhance entrepreneur opportunities to become economically self-sufficient	Curriculum adjustment and deployment of 3, 2-hour business education workshops per month	Up to 10 participants per workshop for a total of 1500 participants per year
Workforce & Business Development	Provide resources, tools, mentorship, and assistance to M/WSBE & Veteran Entrepreneurs who desire to start, grow, and manage small businesses in the 12 counties WBCC footprint	Increase our client impact by 5% over previous year; increase the number of counseling hours provided by 5% over previous year	Minimum 775 unique small business served; minimum of 80 counseling hours
Workforce & Business Development	Advance equity by providing economic opportunities for all residents with a focus on the underserved community and minority women-owned businesses	Continue to focus on providing opportunity and support to women entrepreneurs with an emphasis on women of color and those who reside in the Opportunity Zones	Maintain 85% or more women client base; Maintain 85% minority clients (Black/African American, Hispanic, Asian, Pacific, Native American and/or Veteran or disabled)

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Increase programming which prepares women and minority entrepreneurs for access to capital (business loans, grants, or other forms of revenue)	Conduct capital readiness workshops; partner with other financial institute	One access to capital and/or financial workshop per quarter (total of 4) with at least 20 MWSBE participants

**FY2025 Equity Measures and Targets**

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Continue to increase outreach and engagement among Spanish speaking MWSBEs	Continue to conduct bilingual programming for Latinx women entrepreneurs; Increase Hispanic participation in programming by 5% over 2024 FY	Minimum of 10% overall Hispanic client base
Great Neighborhoods	Partner with our affiliated SCFI, Institute Capital, to support MWSBE success in Charlotte's Opportunity Zones	Conduct community-based programming in neighborhoods where access is limited due to low vehicle ownership, high prevalence of single-parent families, or other limitations	Hold at least 4 programs physically in opportunity zone neighborhoods
Transportation & Planning	Partner with our sister program, the Small Business Transportation Resource Center, to conduct a certification education program for MWSBEs seeking contracts in state or federal DOT transportation or construction projects	Conduct at least 2 programs for minority and women contractors and subs in the construction and/or transportation industry sector	Hold two programs for MWSBE contractors or subcontractors, with a goal of 30 attendees (total)

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 2,820,000.00	\$ 2,817,859.00	\$ 2,958,752.00	\$ -	0.0%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 473,728.00	\$ 626,055.00	\$ 657,358.00	\$ -	0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 3,293,728.00</b>	<b>\$ 3,443,914.00</b>	<b>\$ 3,616,110.00</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 172,600.00	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 63,696.00	\$ 49,762.00	\$ 52,250.00	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 305,881.00	\$ 250,713.00	\$ 263,249.00	\$ -	0.0%
Office Supplies	\$ 41,981.00	\$ 42,877.00	\$ 45,022.00	\$ -	0.0%
Travel & Training	\$ 219,731.00	\$ 156,347.00	\$ 164,164.00	\$ -	0.0%
Technology	\$ -	\$ -	\$ -	\$ -	0.0%
Consultants	\$ 700,430.00	\$ 536,824.00	\$ 563,665.00	\$ -	0.0%
Program/Workshop Expenses	\$ 676,143.00	\$ 381,851.00	\$ 400,944.00	\$ -	0.0%
Postage	\$ 3,293.00	\$ 4,027.00	\$ 4,228.00	\$ -	0.0%
Membership	\$ 17,012.00	\$ 4,100.00	\$ 4,305.00	\$ -	0.0%
Printing	\$ 5,454.00	\$ 13,697.00	\$ 14,382.00	\$ -	0.0%
Subscriptions	\$ 87,506.00	\$ 150,000.00	\$ 157,500.00	\$ -	0.0%
Insurance & Bonding	\$ 40,435.00	\$ 22,081.00	\$ 23,185.00	\$ -	0.0%
Equipment lease/Maintenance	\$ 9,113.00	\$ 8,900.00	\$ 9,345.00	\$ -	0.0%
Interest and Finance Charges	\$ 79,350.00	\$ 70,000.00	\$ 73,500.00	\$ -	0.0%
Depreciation	\$ 274,177.00	\$ -	\$ -	\$ -	0.0%
Indirect Cost/Other	\$ 481,449.00	\$ 529,380.00	\$ 555,849.00	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 3,178,251.00</b>	<b>\$ 2,220,559.00</b>	<b>\$ 2,331,588.00</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Total Expenditures</b>	<b>\$ 6,471,979.00</b>	<b>\$ 5,664,473.00</b>	<b>\$ 5,947,698.00</b>	<b>\$ -</b>	<b>0.0%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 3,002,433	\$ 1,069,750	\$ 1,123,240
Mecklenburg County Funding	\$ 50,000	\$ 50,000	\$ 65,000
Foundation Grants & Funding	\$ 501,887	\$ 506,950	\$ 532,300
Donor Contributions	\$ 572,082	\$ 938,356	\$ 985,275
Service Fees	\$ 1,705,644	\$ 1,689,930	\$ 1,776,930
Other Revenue	\$ 1,641,754	\$ 1,455,023	\$ 1,527,775
<b>Total Revenues</b>	<b>\$ 7,473,800</b>	<b>\$ 5,710,009</b>	<b>\$ 6,010,520</b>

### If requesting funding for a specific program within your agency, please provide description of the specified program

Our request is to fund MWSBE programming under the Women's Business Center of Charlotte. The WBCC is a program of the National Institute of Minority Economic Development. The funding the WBCC receives from City of Charlotte supports all of our work in small business counseling and technical assistance for MWSBE clients.

## Overall Program Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 157,889.00	\$ 223,540.00	\$ 230,247.00	\$ 30,000.00	13.0%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 25,128.00	\$ 52,464.00	\$ 54,038.00	\$ 7,500.00	13.9%
<b>Subtotal Personnel Expenses</b>	<b>\$ 183,017.00</b>	<b>\$ 276,004.00</b>	<b>\$ 284,285.00</b>	<b>\$ 37,500.00</b>	<b>13.2%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 5,625.00	\$ 3,000.00	\$ 3,090.00	\$ 1,500.00	48.5%
Facilities (e.g. rent, utilities)	\$ 15,782.00	\$ 18,840.00	\$ 19,405.00	\$ 10,000.00	51.5%
Office Supplies	\$ 2,552.00	\$ 3,000.00	\$ 3,090.00	\$ 1,500.00	48.5%
Travel & Training	\$ 18,540.00	\$ 26,181.00	\$ 26,966.00	\$ 2,000.00	7.4%
Technology	\$ -	\$ -	\$ -	\$ -	0.0%
Consultants	\$ 4,324.00	\$ 68,900.00	\$ 70,967.00	\$ -	0.0%
Program/Workshop Expenses	\$ 85,641.00	\$ 16,000.00	\$ 16,480.00	\$ -	0.0%
Postage	\$ 321.00	\$ 100.00	\$ 103.00	\$ -	0.0%
Membership	\$ 1,700.00	\$ -	\$ -	\$ -	0.0%
Printing	\$ 221.00	\$ 100.00	\$ 103.00	\$ -	0.0%
Subscriptions	\$ 6,194.00	\$ 14,380.00	\$ 14,812.00	\$ 12,500.00	84.4%
Insurance & Bonding	\$ -	\$ -	\$ -	\$ -	0.0%
Equipment lease/Maintenance	\$ 1,080.00	\$ 2,600.00	\$ 2,678.00	\$ -	0.0%
Interest and Finance Charges	\$ -	\$ -	\$ -	\$ -	0.0%
Depreciation	\$ 34.00	\$ -	\$ -	\$ -	0.0%
Indirect Cost/Other	\$ 32,940.00	\$ 85,821.00	\$ 88,395.00	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 174,954.00</b>	<b>\$ 238,922.00</b>	<b>\$ 246,089.00</b>	<b>\$ 27,500.00</b>	<b>11.2%</b>
<b>Total Expenditures</b>	<b>\$ 357,971.00</b>	<b>\$ 514,926.00</b>	<b>\$ 530,374.00</b>	<b>\$ 65,000.00</b>	<b>12.3%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 150,000	\$ 150,000	\$ 150,000
Mecklenburg County Funding	\$ 50,000	\$ 50,000	\$ 65,000
Foundation Grants & Funding	\$ 202,500	\$ 256,950	\$ 269,800
Donor Contributions	\$ 26,550	\$ 61,000	\$ 64,050
Service Fees	\$ 18,771	\$ 5,000	\$ 5,250
Other Revenue	\$ 67,011	\$ -	\$ -
<b>Total Revenues</b>	<b>\$ 514,832</b>	<b>\$ 522,950</b>	<b>\$ 554,100</b>

### Current Board of Directors

Tyrone Baines, Secretary  
 Ted Edwards  
 Adam Klein  
 Troy Roberts  
 Jeanne Tedrow

Nikita Bailey  
 Dr. Edward Fort  
 Suzanne Malone, Treasurer  
 Michael Suggs, Vice Chair

Martini Eakes  
 Karla Haynes  
 Lewis Myers, Chairman  
 Thurman Smith

# FY 2025 Financial Partner Agency Summary

Agency Name: **Race Matters for Juvenile Justice**

## Agency Description

RMJJ was founded in January 2010, and we are 501 C-3 non-profit organization. Our Board of Directors developed and implemented our Principles for Anti-Racism Organizing which is a set of action-oriented statements that embodies and guides our work and how we will build the culture of the organization. Also, our stakeholder/partner organizations are working to implement RMJJ's Practice Change model in their respective home systems with an intentional focus on using an equity lens to revise policies, procedures, and practices.

RMJJ's partner organizations are also utilizing the Racial Equity Framework and Vertical Alignment Guide as tools and resources to support their equity priorities and goals. Racial equity means that there is a reduction in disparities based on race and we improve results for all groups. As system organizers, we have taken the lead as "truth tellers" acknowledging the racism embedded in our institutions and the devastating results it produces. We consistently advocate for racial equity, fairness, and justice across systems and institutions to see change in the disaggregated community data.

RMJJ organizing blueprint was adopted from the Alliance for Racial Equity in Child Welfare's six dimensions of change, which include:

- (1) The Youth, Parent, and Community Partnership and Development subcommittee manages our Youth Racial Equity Workshop. The Youth Racial Equity Workshop is a two-day interactive, learning experience designed to equip students and young adults (middle and high school students) with an understanding of race and racism in the US including concepts such as bias, power, identity, systems, and culture. The Youth Racial Equity Workshops and facilitators are advised and supported by the Youth, Parent, and Community Partnerships Committee.
- (2) The Public Will and Communication Committee facilitates and manages overall communication, education, outreach, and brand of RMJJ.
- (3) The Workforce Development Committee oversees the Racial Equity Workshop coordination and participation; support and promote workforce development for RMJJ partners; develops local training resources; and provides a schedule and content to support the Board as it deepens its analysis.
- (4) The Research, Evaluation, and Data-based Committee develops policies and procedures to support RMJJ output data collection and sustainability; evaluates RMJJ outcome data and tells the story of change; and collects and disseminates RMJJ partners' and public racial disproportionality and disparity (RDD) data to inform the community.
- (5) The Practice Change Committee gathers information regarding practice change within organizations/agencies/institutions as a result of their participation in RMJJ and any data collected or to initiate practice change
- (6) The Legislative Policy Change, and Finance Reform Committee is a collaborative group working together to impact system leaders'™ discretionary decisions that lead to the reduction of disproportionality and disparate outcomes within schools, law enforcement and juvenile justice, as well as providing educational information regarding legislative policies.
- (7) Our Catalyzing Change initiative brings together alumni of the Racial Equity Workshop to think, talk, and support one another as we work to eliminate the effects of implicit bias and institutional racism. Catalyzing Change consists of:
- (8) People of Color Affinity Group, White Affinity Group, and a Joint Meeting of the two affinity groups. Individuals may choose the affinity group to which they belong. Monthly sessions provide a forum to discuss, probe, and inquire about the impact of race on our lives personally, professionally, and as members of the community.
- (9) The Speakers Bureau initiative engages and prepares the community and institutions for individual and structural transformation with a foundational race analysis by implementing a continuum of information and tools through education and technical support.
- (10) Our Biennial Conference informs and educates the community and stakeholders regarding the impact of disproportionality and disparate outcomes for children and families of color and understand RMJJ roles in institutional organizing for practice change.

## Agency Established

2010

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$51,468	\$128,496	\$77,028

## Total years financial partner with City of Charlotte

1

## FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Conduct workshops to educate professionals, practitioners, and community members on understanding racial equity	<b>New Measure #</b> of workshop attendees	450	N/A	146
Engage institutional and community partners to obtain participants for the workshops	<b>New Measure #</b> of partners	22	N/A	19

## Population Served

Since 2012, RMJJ has offered a two-day, intensive workshop designed to build the capacity of educators, health practitioners, child welfare advocates, judicial officers, elected officials, law enforcement officers, community leaders and the public, who are interested in understanding and eliminating racial inequities, disparities, and disproportionality within the Mecklenburg community. To date, we have hosted 247 workshops from approximately 200 different organizations (including our stakeholders' institutions) and have educated 6,648 individuals. Our target audience is the workforce of organizations, systems, and institutions. RMJJ launched our Youth Initiative in 2021 to educate and equip middle and high school-aged youth and college-aged adults. This initiative allows us to co-create with our youth, share power, center their voices, stories, and lived experiences within systems, institutions, and our community helping to inform policy, procedure, and practice changes within systems and institutions.

## Council Priority Area(s)



Workforce & Business  
Development

## Describe the activities that will be supported through requested city funding:

This request for City funding that will support paying the personnel and operating costs associated with 50% of the Executive Director position (\$53,495.88) and to develop the planning process for Cross Systems Collaboration initiative (\$75,000) in the amount of \$128,495.88. RMJJ and the RMJJ Executive Director will provide the services. RMJJ will provide human resources processing and payroll services and will serve as the employee's employer for purposes of withholding taxes, Social Security, and unemployment and providing any benefits to the employee. Also, the funds will be utilized to support our Cross Systems Collaboration to advance Racial Equity and Diversity, Equity, and Inclusion initiative. The requested resources will cover personnel/ consulting support and operational costs including orientation, technology support/purchase volunteer manage system, food/meals for the meeting/sessions, leadership group meetings, recruitment & capacity building engagement sessions, evaluating feedback from participants.

**If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?**

Funding request in the previous fiscal year, supported paying the personnel and operating costs associated with 50% of the Executive Director position. This request for additional funds will be utilized to support our post-racial equity workshop initiative that involves the bringing together racial equity workshop alumni to intentionally engage in a Cross-System Collaboration to advance Racial Equity and Diversity, Equity, and Inclusion. The requested resources will cover personnel/consulting support and operational costs including orientation, technology support/purchase volunteer manage system, food/meals for the meeting/sessions, leadership group meetings, recruitment & capacity building engagement sessions, evaluating feedback from participants.

**FY2025 Performance Measures and Targets**

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Conduct fifteen workshops to educate professionals, practitioners, and community members on understanding racial equity	# of workshop attendees	350
Workforce & Business Development	Cross-System Collaboration to advance Racial Equity and Diversity, Equity, and Inclusion	By the end of first quarter, confirm the leadership group for this initiative.	15 racial equity workshop alumni will be selected to provide Cross-System Collaboration leadership
Workforce & Business Development	Cross-System Collaboration to advance Racial Equity and Diversity, Equity, and Inclusion	By the end of the second quarter, host racial equity workshop alumni recruitment sessions to organize and mobilize racial equity workshop alumni	4 recruitment sessions will be held.
Workforce & Business Development	Cross-System Collaboration to advance Racial Equity and Diversity, Equity, and Inclusion.	By the end of the third quarter, operationalize capacity building engagement session with racial equity workshop alumni	4 engagement sessions will be held and 75% of participants will complete surveys to inform future efforts
Workforce & Business Development	Cross-System Collaboration to advance Racial Equity and Diversity, Equity, and Inclusion.	By the end of the fourth quarter, host conversations to co-create a design for Cross Systems Framework.	Four engagement sessions will be completed and 75% of participants will complete surveys to inform future efforts.

**FY2025 Equity Measures and Targets**

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	The RMJJ Board of Directors and the organizations they represent are engaged in our Practice Change model	Board members and their organizations will engage in the Practice Change model	10 Board Members and their organizations will have participated in the five step Practice Change model

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 85,000	\$ 90,000	\$ 102,000	\$ 51,000	50.0%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 4,992	\$ 4,992	\$ 4,992	\$ 2,496	50.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 89,992</b>	<b>\$ 94,992</b>	<b>\$ 106,992</b>	<b>\$ 53,496</b>	<b>50.0%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 540	\$ 500	\$ 500	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 4,965	\$ 5,000	\$ 5,000	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 8,946	\$ 8,946	\$ 8,946	\$ -	0.0%
Office Supplies	\$ 527	\$ 1,000	\$ 1,000	\$ -	0.0%
Travel & Training	\$ 7,260	\$ 5,000	\$ 5,000	\$ -	0.0%
Technology	\$ 27,018	\$ 12,000	\$ 20,000	\$ -	0.0%
<b>Programs</b>					
Racial Equity Workshops	\$ 198,860	\$ 190,000	\$ 190,000	\$ 75,000	39.5%
<b>Subtotal Operating Expenses</b>	<b>\$ 248,115</b>	<b>\$ 222,446</b>	<b>\$ 230,446</b>	<b>\$ 75,000</b>	<b>32.5%</b>
<b>Total Expenditures</b>	<b>\$ 338,107</b>	<b>\$ 317,437</b>	<b>\$ 337,437</b>	<b>\$ 128,496</b>	<b>38.1%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 64,385	\$ 75,000	\$ 75,000
Mecklenburg County Funding	\$ 25,000	\$ -	\$ -
Foundation Grants & Funding	\$ -	\$ 150,000	\$ 150,000
Donor Contributions	\$ 1,962	\$ 5,000	\$ 5,000
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 230,056	\$ 332,500	\$ 335,000
<b>Total Revenues</b>	<b>\$ 321,403</b>	<b>\$ 562,500</b>	<b>\$ 565,000</b>

## Current Board of Directors

Honorable Elisa Chin-Gary	Dana Frady
Chiquitha Lloyd	Jerry Boyce
Derrick Anderson	Honorable Judge Donald Cureton
Honorable Judge Rickye McKoy-Mitchell	Honorable Judge Elizabeth Trosch
Honorable Judge Ty Hands	Honorable C. Renee Little
Honorable Judge Lou Trosch	Honorable Judge Kimberly Best
Honorable Judge Reggie McKnight	Dr. Susan McCarter
Deputy Chief Sherie Pearsall	Lt. Celestine Ratliff
Elizabeth Gerber	Kristen Sellers
Chief Deputy Rodney Collins	Cassandra Alexandra
Casey Calloway	Heather Johnson
TJ Larry	Eddie Thomas, Jr.
Dr. Jacqueline McKnight	Ronnie Devine
Karen Parker	MenTchaas Ari
Brittany Foster	

# FY 2025 Financial Partner Agency Summary

Agency Name: **Safe Alliance, Inc.**

## Agency Description

The history of Safe Alliance began in 1909 when one hundred community leaders in Charlotte each pledged \$25 a year to support a new nonprofit—originally named “Associated Charities”—to provide for those in greatest need. During the past century, the organization’s name has changed several times as its mission has adapted to meet the needs of this rapidly evolving city, Charlotte. Now, in 2024, the mission of Safe Alliance is to provide hope and healing to those impacted by domestic violence and sexual assault. Safe Alliance accomplishes this mission through five established programs:

1. The Greater Charlotte Hope Line (980-771-HOPE) is operated 24/7 by Hotline Advocates who provide crisis intervention, safety planning, caregiver education, and linkage to community resources. Last fiscal year, the Hope Line received over 9,241 calls. The Hope Line is also the main point of entry into Safe Alliance’s other programs.
2. At the Clyde & Ethel Dickson Domestic Violence Shelter, victims find the safe haven they need to rebuild their lives. The shelter services include provision for basic needs. Last fiscal year, we provided shelter for 852 victims including nearly 400 children. Of these 852 people, 90% reported increased self-sufficiency through safety-related empowerment after their stay.
3. The Victim Assistance Court Program (VACP) helps victims secure the legal protections they need to stay safe from abusers. One important protection is a Domestic Violence Protective Order (DVPO). In the VACP, Victim Advocates work with attorneys to assist victims with filing for DVPOs and provide court accompaniment for their emergency ex parte hearing. Then, attorneys provide pro bono representation for the DVPO hearings and, one year later, for their DVPO renewal. Attorneys also help victims prepare for family court, which makes permanent determinations about custody and property. Last fiscal year, VACP completed 6,048 safety plans and accompanied victims to court on 3,723 occasions. Among VACP clients, 99% reported an increase personal safety when contacted three months after exiting the program.
4. The Sexual Trauma Resource Center provides advocacy, hospital accompaniment, and counseling to survivors of sexual assault. Advocacy involves crisis intervention, safety planning, and getting connected to community resources. Volunteers and Victim Advocates accompany survivors to the hospital in the immediate aftermath of an assault. Then, survivors may receive affordable counseling to process trauma and promote long-term healing. Last year, advocates provided over 1,353 advocacy sessions, and clinicians provided 1,241 counseling sessions. Among all advocacy clients, 99% were able to articulate at least one safety strategy that they intended to take.
5. The Survivor Resource Center, a precursor to the Umbrella Center, opened in February 2021 and has evolved Mecklenburg County’s community response, engaged community partners, and enhanced multi-disciplinary teams by bringing together service providers in one location using the DOJ-recognized Family Justice Center model. The model is best-practice for reducing domestic violence-related homicides, increasing victim safety, and increasing the prosecution of offenders. Serving victims of domestic violence, sexual assault, and child abuse, the SRC provides core services for adult and child victims through immediate and long-term advocacy/support needed for sustained healing. The SRC increases sexual assault survivors’ access to coordinated and comprehensive services from Safe Alliance navigators/advocates, Pat’s Place Child Advocacy Center, the sexual assault police unit, Atrium Health, the DA’s Office, and Mecklenburg Co. community/social services. Last fiscal year, 1,233 adults and children were referred to the SRC, including victims of domestic violence, child abuse, and human trafficking.

## Agency Established

1909

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$397,038	\$473,805	\$76,767

## Total years financial partner with City of Charlotte

42 years

### FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Improve overall safety of victims	Develop Safety Plans	12,500 safety plans will be developed with survivors by Victim Assistance Court Program, Greater Charlotte Hope Line, and Survivor Resource Center	12,396	5,835
Improve overall safety of victims	Complete Pleadings for Domestic Violence and Sexual Assault Victims for civil domestic violence court	Pleadings will be completed 825 times for civil domestic violence court	784	346
Improve overall safety of victims	Victim Assistance Court Program will accompany clients to civil and criminal court and provide outreach in civil and criminal court.	Victims will be accompanied or receive outreach in court 3450 times.	3,493	1,073
Improve overall safety of victims	Provide legal advice and/or representation to victims regarding their civil domestic violence case and/or provide legal services in relation to a custody case	Attorneys will provide legal advice and/or representation to victims prior to or at their domestic violence one-year hearing and/or legal services related to a custody case against their abuser 475 times.	452	245
Increase perception of Safety	Positive responses from VACP clients on outreach survey regarding safety	90% of VACP clients will report an increase in their personal safety 6 months after receiving services	99%	95%
Increase perception of Safety	Survivors will be empowered, able to consider all choices available to them, and demonstrate readiness to make decisions in their own healing journey	90% of hotline callers will articulate at least one action available to enhance their safety and emotional support.	97%	98%

### Population Served

Safe Alliance disproportionately serves people of color, women, and individuals living in poverty compared to the broader Mecklenburg County population. According to the most recent United States Census, Mecklenburg County's population was 1,115,482 in 2020. The 2020 Census reports that 46.1% of Mecklenburg County residents are White alone, 33.0% are Black, 13.8% are Hispanic or Latino, and 0.8% are Asian. In FY23, Safe Alliance served 8,377 survivors. Of these survivors, 18% were White alone, 50% were Black, 20% were Hispanic or Latino, and 2% were Asian. Additionally, of those victims, more than 90% reported living below the federal poverty line compared to the 11% of Mecklenburg County population in that income bracket according to the most recent census. While domestic violence affects all socioeconomic levels, low-income survivors and communities of color face more destabilizing effects—this can perpetuate cycles of poverty by removing victims from the workforce and impeding the social, emotional, and cognitive growth of children. Employment is interrupted when trauma, injuries or the

offender's controlling actions prohibit a victim from working. As a result, abuse victims have higher rates of unemployment and reliance on public assistance. Frequently abuse leads to homelessness when the only way to escape an abuser is to flee one's own home. The Coalition on Human Needs reports domestic violence is a main cause of homelessness for women and families, either when women are forced to flee a relationship or when they are evicted from their homes because of the abuse perpetrated against them. Research shows that as many as 57% of all homeless women report domestic violence as the immediate cause of their homelessness and 80% of homeless women with children have previously experienced domestic violence. The power and control dynamics related to abuse create unique barriers to accessing shelter and affordable housing for victims of domestic violence. At Safe Alliance, victims not only have a safe space in which to heal and process their trauma, but also have access to counseling and advocacy services, parenting programs, processing groups, and numerous other resources. In FY23, Safe Alliance served 8,377 survivors of domestic violence or sexual assault and reached over 13,000 more people through outreach, education, and awareness. Of those victims, close to half are under the age of 18, more than 90% report living below the federal poverty line, and 80% are a racial or ethnic minority. Each of these demographics pose additional and intersectional challenges for victims of domestic violence, making their participation in our services a crucial step in the healing process.

### **Council Priority Area(s)**



#### **Describe the activities that will be supported through requested city funding:**

With continued funding from the City of Charlotte, we will continue to grow the Greater Charlotte Hope Line (GCHL) and Victim Assistance Court Program (VACP) to serve even more survivors in Mecklenburg County.

These two robust programs directly empower survivors and enable them to seek independence and safety in some of the most difficult times of their lives. The pandemic brought with it nationwide increases in rates of domestic violence, and Charlotte was no exception to the national trends. The GCHL helped to complete more than 6,000 safety plans for callers, and over 97% of callers were able to articulate at least one strategy to keep themselves and their family safer after the call. The GCHL is a frontline safety net for those most at risk in our community.

At Safe Alliance, our Victim Assistance Court Program (VACP) provides court advocacy services to domestic violence and sexual assault victims throughout and beyond the legal process of obtaining a protective order.

During these legal processes, victims are represented and/or provided legal advice by an attorney from our Legal Representation Program (LRP). Access to civil legal representation and/or advice in domestic violence

hearings ensures victims receive vital legal protections. Among victims seeking protective orders, Domestic Violence Protective Orders (DVPO) are granted to 83% of those represented by an attorney and only 32% of those without an attorney. Given that domestic violence-related civil hearings encompass many procedural and evidentiary rules that attorneys are trained to understand, the victim is often left with no other choice than to appear on their own without the financial ability to hire an attorney. This creates the risk of abusers utilizing the court system as a tool to further intimidate and traumatize victims. However, access to free civil legal representation and/or advice in domestic violence cases is an even greater priority because underserved victims of domestic violence disproportionately lack access to necessary funds. Nearly one in four women experiencing homelessness are homeless because of domestic violence. Low-income domestic violence victims have over twice as many civil legal needs as other low-income individuals – even so, 86% of low-income victims of domestic violence or sexual assault receive little to no professional legal help. Even victims who appear to be financially

stable may be unable to access the funds necessary to pay attorney fees due to the control abusers often exert over their finances.

As court-based programs, Safe Alliance’s VACP and LRP are the leading non-profit legal assistance programs for victims of domestic violence and sexual assault seeking DVPOs in the County. At VACP, advocates navigate four courtrooms, accompany victims to court, provide guidance during court proceedings, help victims to safety plan, and educate victims on domestic violence. After victims appear for their ex parte DVPO hearings, LRP attorneys provide free legal representation and/or advice to those seeking one-year DVPOs, review complaints prior to filing, and assist in family law matters through consultations and assisting with the drafting and review of pleadings.

The funding from the city will allow us to keep expanding the GCHL, answering more calls and serving more survivors. Advocates will be able to directly connect callers to the VACP when necessary. VACP staff will assist victims with applying for DVPOs, accompany victims to emergency ex parte hearings, and follow up with victims after the conclusion of their case. VACP attorneys will represent clients at DVPO hearings and renewals as well as helping prepare victims for Family Court determinations of custody and property.

**If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?**

The increased funding ask is to cover the rising inflation that has been impacting the economy. We have factored in a 5% rise to ensure we are able to support our staff and ensure wages can cover the increased cost of living. Additionally, several grants that we have historically applied for and received have sunset in recent years, leading to a decline in expected funding. If awarded, the additional funds from the city will continue to go directly into our GCHL and VACP programs to serve our clients with compassion and dignity.

**FY2025 Performance Measures and Targets**

Strategic Priority	Objective	Measures	Target
Safe Communities	Improve overall safety of victims	VACP will accompany clients to and provide outreach in civil and criminal court	Victims will be accompanied or receive outreach in court 3450 times.
Safe Communities	Improve overall safety of victims	Develop Safety Plans	12,500 safety plans will be developed with survivors by VACP, GCHL, and SRC.
Great Neighborhoods	Improve overall safety of victims	Complete pleadings for domestic violence and sexual assault victims	Pleadings will be completed 800 times for represented victims in court.
Great Neighborhoods	Improve overall safety of victims	Provide legal aid to victims regarding their civil domestic violence case and/or in relation to a custody case.	Attorneys will provide legal advice/representation to victims in relation to DVPO or custody cases against their abuser 475 times.
Great Neighborhoods	Improve overall safety of victims	Positive responses from VACP clients on outreach survey regarding safety	90% of VACP clients will report an increase in their personal safety 6 months after receiving services.

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Improve equity and awareness of staff	Training for staff surrounding Diversity, Equity, and Inclusion (DEI).	All staff will receive Race Matters for Juvenile Justice and other ongoing DEI trainings throughout the year.
Safe Communities	Increase outreach to underrepresented communities	Provide programming in communities of color and other underrepresented populations.	73% of clients served by VACP will be Black, Hispanic, Latino, Asian, American Indian or Alaska Native.
	Support and engage POC staff members	Affinity groups for employees of color to discuss and heal from racial trauma	Justin Perry (local counselor and activist) will lead sessions regularly for staff members of color.
	Improve equity and diversity of the Board of Directors	Invite members to the board based on their unique lived experiences from many varying backgrounds and communities.	Our Board will be diverse and representative of the community of Charlotte.
	Improve equity in hiring	Develop written materials and training on inclusivity in the hiring process	80% of managers will report they intentionally created a diversity-focused interview team.
	Improve equity in hiring	Create interview questions and process with inclusion as a key factor.	95% of managers will report they utilized 2+ DEI questions in job interviews.

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 3,692,643	\$ 3,838,152	\$ 3,953,296	\$ 334,913	8.5%
Merit	\$ 122,982	\$ 180,144	\$ 185,548	\$ 16,746	9.0%
Benefits	\$ 1,012,995	\$ 1,106,243	\$ 1,139,430	\$ 105,646	9.3%
<b>Subtotal Personnel Expenses</b>	<b>\$ 4,828,620</b>	<b>\$ 5,124,538</b>	<b>\$ 5,278,274</b>	<b>\$ 457,305</b>	<b>8.7%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 14,240	\$ 28,622	\$ 29,481	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 780,579	\$ 775,208	\$ 798,464	\$ -	0.0%
Office Supplies	\$ 120,475	\$ 109,205	\$ 112,481	\$ 1,000	0.9%
Travel & Training	\$ 35,424	\$ 108,135	\$ 111,379	\$ 2,500	2.2%
Technology	\$ 226,355	\$ 269,800	\$ 277,894	\$ 4,000	1.4%
Bank & Credit Card Fees	\$ 13,447	\$ 15,310	\$ 15,769	\$ -	0.0%
Direct Assistance to Clients	\$ 345,484	\$ 223,836	\$ 230,551	\$ -	0.0%
Dues, Licenses, & Subscriptions	\$ 9,382	\$ 15,470	\$ 15,934	\$ 2,500	15.7%
Fundraising	\$ 28,306	\$ 43,250	\$ 44,548	\$ -	0.0%
Insurance	\$ 59,357	\$ 74,517	\$ 76,753	\$ -	0.0%
Printing & Postage	\$ 19,717	\$ 59,472	\$ 61,256	\$ 5,000	8.2%
Professional Services	\$ 462,044	\$ 547,837	\$ 564,272	\$ 1,500	0.3%
Program Support	\$ 41,214	\$ 53,090	\$ 54,683	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 2,156,026</b>	<b>\$ 2,323,752</b>	<b>\$ 2,393,465</b>	<b>\$ 16,500</b>	<b>0.7%</b>
<b>Total Expenditures</b>	<b>\$ 6,984,646</b>	<b>\$ 7,448,291</b>	<b>\$ 7,671,739</b>	<b>\$ 473,805</b>	<b>6.2%</b>

Revenues			
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ 3,526,403	\$ 3,530,983	\$ 3,636,913
Mecklenburg County Funding	\$ 1,377,512	\$ 1,381,812	\$ 1,423,266
Foundation Grants & Funding	\$ 585,578	\$ 507,688	\$ 522,919
Donor Contributions	\$ 1,320,692	\$ 1,389,500	\$ 1,431,185
Service Fees	\$ 12,372	\$ 9,108	\$ 9,381
Other Revenue	\$ 277,144	\$ 230,760	\$ 237,683
<b>Total Revenues</b>	<b>\$ 7,099,702</b>	<b>\$ 7,049,851</b>	<b>\$ 7,261,347</b>

**If requesting funding for a specific program within your agency, please provide description of the specified program**

The GCHL is a 24/7, free phone line for Mecklenburg County residents seeking help for parenting support, domestic violence, and sexual assault. This resource is confidential, safe, and staffed by highly-trained advocates with the knowledge and empathy necessary to assist those making the call. We provide a single-source for crisis intervention services as well as support and prevention programming through education, guidance, emotional support, and referrals to appropriate community services. Last fiscal year, more than 6,000 safety plans were completed via the GCHL. The VACP assists victims of domestic violence who seek to file or renew 50B DVPOs or 50C No-Contact Orders because they have been assaulted, threatened, and/or stalked. Advocates at the VACP also provide crisis intervention, safety planning, domestic violence support groups for both adults and children, and civil and criminal court accompaniment. Staff and pro bono attorneys in our LRP provide free legal representation and advocacy to those seeking DVPOs and renewals.

## Program Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 640,509	\$ 600,994	\$ 625,033	\$ 334,913	53.6%
Merit	\$ -	\$ 9,074	\$ 31,185	\$ 16,746	53.7%
Benefits	\$ 206,929	\$ 227,060	\$ 236,142	\$ 105,646	44.7%
<b>Subtotal Personnel Expenses</b>	<b>\$ 847,438</b>	<b>\$ 837,127</b>	<b>\$ 892,360</b>	<b>\$ 457,305</b>	<b>51.2%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 45	\$ 500	\$ 520		0.0%
Facilities (e.g. rent, utilities)	\$ 666	\$ 1,600	\$ 1,664		0.0%
Office Supplies	\$ 9,936	\$ 8,960	\$ 9,318	\$ 1,000	10.7%
Travel & Training	\$ 2,234	\$ 18,892	\$ 19,648	\$ 2,500	12.7%
Technology	\$ 33,227	\$ 46,333	\$ 48,186	\$ 4,000	8.3%
Direct Assistance to Clients	\$ 10,219	\$ 9,836	\$ 10,229		0.0%
Dues, Licenses, & Subscriptions	\$ 3,050	\$ 4,055	\$ 4,217	\$ 2,500	59.3%
Insurance	\$ 18,683	\$ 22,328	\$ 23,221		0.0%
Printing & Postage	\$ 11,384	\$ 13,905	\$ 14,461	\$ 5,000	34.6%
Professional Services	\$ 2,137	\$ 7,340	\$ 7,634	\$ 1,500	19.6%
Program Support	\$ 10,836	\$ 11,100	\$ 11,544	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 102,419</b>	<b>\$ 144,848</b>	<b>\$ 150,642</b>	<b>\$ 16,500</b>	<b>11.0%</b>
<b>Total Expenditures</b>	<b>\$ 949,857</b>	<b>\$ 981,976</b>	<b>\$ 1,043,003</b>	<b>\$ 473,805</b>	<b>45.4%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 371,514	\$ 427,377	\$ 430,000
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ 10,000	\$ 10,000	\$ 10,000
Donor Contributions	\$ -	\$ -	\$ -
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ -	\$ -	\$ -
<b>Total Revenues</b>	<b>\$ 381,514</b>	<b>\$ 437,377</b>	<b>\$ 440,000</b>

### Current Board of Directors

Tameka Peterson  
 Kimberly Zirkle  
 Linda Christopherson  
 Julia Hejazi  
 Pasha Maher  
 Allen O'Rourke  
 Nakia Savage  
 Derek Beres

Beth Cameron  
 Jean Davis  
 Leta Emmanuel  
 Jamilah Espinosa  
 Mark T. Wilson  
 Fred Hudson  
 Virginia (Barnhardt) Sutton  
 Jeffrey Klein

Noellee Clarke, MD  
 Suzanna Fox  
 Judge Faith Fickling-Alvarez  
 Spencer Merriweather  
 Libby Kelligrew  
 Phil Kline

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# FY 2025 Financial Partner Agency Summary

Agency Name: **The Males Place**

## Agency Description

The Males Place Inc is a multi-dimensional Manhood training organization that was founded in 1993 and became a 501c3 Nonprofit organization in March of 2014 that is governed by its 6-member Board of Directors. The organization was founded by Reggie Singleton, who serves as the Executive Director. The Organization uses its Three Major Tenets of: Bi-Weekly Mentorship, Farming and Agriculture, Social Justice along with Regional and International travel to inculcate and train 12–18-year-old Black boys to be responsible, upright and men who contribute to our economic efforts and society. The Elders/Mentors lead and execute the organizational goals and directives. We currently have 25 Black young men from diverse backgrounds that include families mostly from single parent homes and significant numbers that are at or below Federal Poverty Levels.

## Agency Established

2014

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$100,000	\$100,000	\$0

(FY2024 ARPA Funded)

## Total years financial partner with City of Charlotte

1 year

## FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Increase the enrollment of black boys aged 12-18 in the mentoring program	<b>NEW MEASURE</b> Track and compare the number of enrolled black boys before and after implementing targeted recruitment strategies	20%	N/A	21%
Improve academic performance among mentees by providing tutoring and academic support	<b>NEW MEASURE</b> Regularly assess the academic progress of mentees through report cards and school performance evaluations.	15% increase in GPA	N/A	0.2%
Enhance personal and social development of mentees by organizing workshops and activities that promote life skills, leadership, and self-confidence	<b>NEW MEASURE</b> Conduct pre-and post-workshop surveys or self-assessment scales to gauge changes in mentees' self-esteem levels.	25% increase in self-esteem scores	N/A	80% show increased scores
Foster positive relationships between mentors and mentees,.	Administer feedback surveys to mentees regarding their mentorship experiences and the quality of their relationships	80% of mentees report having a supportive mentor in their lives.	N/A	93%

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Increase college and career readiness among mentees,	Track mentees' involvement in college preparation activities, career exploration programs, internships, and job shadowing experiences	70% of participants demonstrating knowledge and engagement in future education or employment opportunities	N/A	1 mentee matriculated to UNCC
Develop a network of community partnerships and collaborations to expand resources and support for mentees, establishing connections with local organizations within the first year	Maintain a record of established partnerships and collaborations, tracking the number and types of resources shared with mentees.	>5	N/A	6

**Population Served**

Participants are 100% Black boys 12-18 from diverse backgrounds with a variety of needs and interest. Students are largely from underserved or marginalized communities that are at or below Federal Poverty Guidelines. Some of our students are special needs with a variety of diagnosis that include being on the Autism spectrum. Additionally, several are from very high performing backgrounds that blends well with their respective peers.

**Council Priority Area(s)**



**Describe the activities that will be supported through requested city funding**

- Bi-weekly Programming
- Books and supplies
- Farming and Agricultural Supplies
- Stipends and Incentives for Students
- Healthy Food Options
- Regional and International Bench Marking Trips
- Mentorship Training and Development
- Local Travel
- Community Service
- Speaker and Trainer Fees
- Facilities
- Administrative
- Uniforms

### FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Safe Communities	Establish key performance indicators (KPIs) to measure the program's impact on Academic progress ,financial literacy and community safety. Collaborate with local organizations to identify mentees, ensuring a diverse and inclusive outreach. Regularly assess mentee progress and adjust the program as needed to align with the city's strategic priorities on fostering safe and thriving communities.	Pre & Post Test of Program assessment Number of Community Partners Numbers of reduction of community safety incidents in areas with TMP participants	20% increase of Mentees of Safety concepts and behaviors over the course of program

### FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Safe Communities	Identify and implement outreach strategies to engage community. Ensure access to membership into the program and in particularly underserved communities	Track students grades and suspensions	Attain a satisfaction rate of 80% during surveys

### Overall Agency Budget

	Expenditures FY 2023- FY 2025				Percent city request of overall budget*
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	
<b>Personnel</b>					
Salaries	\$ -	\$ 64,400	\$ -	\$ 10,000	15.5%
Merit-Volunteer Aprecciation	\$ -	\$ 10,000	\$ -	\$ 10,000	100.0%
Benefits	\$ -	\$ -	\$ -	\$ -	0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ -</b>	<b>\$ 74,400</b>	<b>\$ -</b>	<b>\$ 20,000</b>	<b>26.9%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ -	\$ -	\$ -	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ -	\$ -	\$ -	\$ -	0.0%
Supplies-Agricultural and Other Program	\$ -	\$ 20,000	\$ -	\$ 15,000	75.0%
Travel & Training	\$ -	\$ 95,000	\$ -	\$ 30,000	31.6%
Technology	\$ -	\$ -	\$ -	\$ -	0.0%
Program Meals	\$ -	\$ 25,000	\$ -	\$ 17,000	68.0%
Transportation	\$ -	\$ 2,000	\$ -	\$ 1,000	50.0%
Incintives	\$ -	\$ 30,000	\$ -	\$ 12,000	40.0%
<b>Subtotal Operating Expenses</b>	<b>\$ -</b>	<b>\$ 172,000</b>	<b>\$ -</b>	<b>\$ 75,000</b>	<b>43.6%</b>
<b>Total Expenditures</b>	<b>\$ -</b>	<b>\$ 246,400</b>	<b>\$ -</b>	<b>\$ 95,000</b>	<b>38.6%</b>
*Percent city request of overall budget based on FY24 Budget					

Revenues			
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ -	\$ 100,000	\$ -
Donor Contributions	\$ -	\$ -	\$ -
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ -	\$ -	\$ -
<b>Total Revenues</b>	<b>\$ -</b>	<b>\$ 100,000</b>	<b>\$ -</b>

**Current Board of Directors**

Khalid McRae	Jacqueline Alston
Nekie Boyd	Charles Pinckney
Deborah Howey-Echols	Leonard Brock

# FY 2025 Financial Partner Agency Summary

Agency Name: **TreesCharlotte**

## Agency Description

TreesCharlotte stands as a vibrant force in our community, a public/private nonprofit collaboration committed to cultivating and preserving the urban forest that defines our beloved city. Since our inaugural planting season in 2012, we have left a mark, distributing over 54,000 trees and engaging over 30,000 volunteers. As we reflect on our past achievements, we look to the future with a vision that extends beyond the physical landscape - a future where every Charlottean embraces the responsibility of nurturing our precious canopy. Our mission is clear: to grow, diversify, and steward Charlotte's iconic urban forest. Through science-based programs and the dedication of trained volunteers, we educate residents about the intrinsic value of trees and impart the skills needed to plant and care for them. Our commitment extends beyond the act of planting; we are sowing the seeds of knowledge and environmental stewardship that will endure from generation to generation. With a deliberate focus on underserved areas, we cultivate a sense of ownership and unity in diverse neighborhoods. We actively advocate for these communities to have access to the plentiful economic and health benefits offered by trees, including clean air, energy savings, and stormwater mitigation.

Our success is measured not just in trees planted but in lives touched. Through 90 education presentations led by our Community Educator, we've instilled environmental responsibility by engaging 3,018 individuals since fall of 2020. With 292 Tree Care events, we ensure the ongoing well-being of our urban forest, providing care for over 3,100 trees, thanks to the support of 1,265 volunteers.

Our mission goes beyond planting trees and shaping more than the landscape; we're nurturing a sustainable, connected community for generations to come.

## Agency Established

2013

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$250,000	\$500,000	\$250,000

## Total years financial partner with City of Charlotte

6 years

## FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
<b>Treesilience</b> will create a centering focus on <b>tree equity</b> as Charlotte's overall tree canopy is not equally distributed. Underinvested communities of color, particularly those in 'the Crescent' outside uptown, have fewer trees than wealthier neighborhoods and fewer resources to steward their existing trees. Local	<b>NEW MEASURE</b> A. Engage Ramblewood and McCrorey Heights households across objective opportunities B. Deliver State of the Canopy, based on TreeMapping results and Canopy Assessment	A & B> Engage 15% of households in education, tree mapping, planting, and tree care and stewardship opportunities C. 100 trees distributed (planted & adopted)	N/A	A & B> 14.2% participation across both neighborhoods through all Treesilience programs (total of 317 homes, 45 homes have participated). C. 44 trees distributed & planted

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
residents will be supported and activated to make a difference in Charlotte’s most under-canopied and disinvested neighborhoods.	C. Plant and distribute trees to grow canopies D. Assess mature tree care needs E. Steward trees	D. Assess 15 homes for mature tree care needs E. Steward trees at 30 homes		D. 17 homes assessed E. 25 homes
To make a substantial difference in the citywide issue of significant <b>tree canopy loss</b> occurring, TreesCharlotte needs to spark a movement of local residents working together to address tree canopy loss. To accomplish this, TreesCharlotte is launching a citywide engagement campaign entitled “ <b>Get Rooted</b> ” to activate a wide variety of constituencies throughout Charlotte, unlocking the potential of companies, neighborhoods, young professionals, families and civic leaders.	<b>NEW MEASURE</b> • From a perception study this spring, we learned 3% of Charlotteans were fully aware of TreesCharlotte and our mission. • Increase newsletter subscribers, social media followers, sign-ups, web traffic and donors.	Increasing this very low perception percentage is our key metric being approved at our September Board meeting – along with our overall followership targets.	N/A	The “ <b>Get Rooted</b> ” Awareness Movement is currently in the planning phase, with a tentative launch date of April 27, 2024 (National Arbor Day). Metrics review was extended to February’s 2024 Board meeting.
TreesCharlotte partners with qualifying communities and organizations to host tree planting events and adoptions called CommunityWoods. These organized events are a great way to build camaraderie, beautify our community and add to the city’s diminishing canopy.	Hold targeted number of CommunityWoods events and collect post event feedback.	Host 10 CommunityWoods events ( <i>adjusting down 2 for allow for adequate resources for the 2 Treesilience communities</i> )	12 Completed	9 CommunityWoods: • 3 Neighborhoods • 3 Houses of Faith • 3 Parks
To grow and diversify Charlotte’s urban forest to provide the benefits of a healthier environment to all residents	Plant and distribute trees throughout Charlotte, with a focus on adoptions for under-canopied and under-served communities	Plant & distribute 5,800 trees	5,561 trees planted/ distributed	3,128 trees planted/ distributed
Grow and diversify our urban forest at schools because trees improve physical and mental health in children	Build the tree canopies on school campuses	Engage with 6 schools to plant on their campus	Planted trees on 6 school campuses	Executed 4 school Plantings 1. JH Gunn ES 2. Sterling ES 3. McKee ES 4. Telra Institute

## Population Served

TreesCharlotte warmly welcomes all Charlotteans to join us in cultivating a greener city. If your neighborhood lacks tree cover, our CommunityWoods program is ready for your application, offering tailored planting plans and exclusive TreeDay and TreeAdoption events. For residents citywide, our TreeAdoptions provide free trees, mulch, and planting demonstrations, directly benefiting thousands each year and indirectly benefiting the entire city.

Focused on equity, we identify and support underserved communities through targeted planting projects. Several of our Zip Code TreeAdoption events deliberately select areas with below-average canopy coverage, providing residents an opportunity to actively participate in enhancing their surroundings. Beyond these initiatives, we regularly host educational events, TreeFests, arborist workshops, treewalks, and a wide variety of engaging activities. These events are open to everyone, fostering community knowledge and appreciation for our urban forest.

## Council Priority Area(s)



### Describe the activities that will be supported through requested city funding:

TreesCharlotte will use the funding to purchase 3,600 seven-gallon trees that will be planted and distributed throughout the city during the October-March planting season with a specific focus on under-canopied and high loss canopied areas. TreesCharlotte will accomplish this through 4 key initiatives:

1. Year two of Treesilience, our targeted effort to provide trees, education and community engagement to Charlotte's under-canopied and disinvested neighborhoods. Key tree-equity building features of this program include:
  - Trust-Built Relationships – In addition to McCrorey Heights and Ramblewood, TreesCharlotte is identifying additional neighborhoods that are most in need of services, with the organization's Community Engagement Manager forming authentic relationships that lead to trust and engagement.
  - Yearlong Services - TreesCharlotte is augmenting its neighborhood-based tree plantings to spark education, celebration, tree mapping, caring and stewardship activities through an annualized calendar of engagement. The long-term intention is building healthy relationships with trees and all they provide our community.
  - Volunteer Engagement - Treesilience offers a variety of volunteer experiences that provide residents with a way to meaningfully advance Charlotte's tree canopy in under-resourced areas of the city.
  - Mature Tree Care – In our pilot year, we have found that managing mature trees instills a deep fear in homeowners which we seek to allay by providing risk-assessed mature tree pruning and removal where necessary. Replanting is a requirement of removal.
2. CommunityWoods: TreesCharlotte partners with qualifying neighborhoods, schools, houses of faith, athletic associations and other nonprofit organizations to host tree-planting and tree-giveaway events. These organized events are a great way to build camaraderie, beautify our community and add to the city's canopy.
3. TreeAdoptions: Residents can get two free trees to plant in their own yards. Some TreeAdoptions are open to all Charlotteans, others are limited to certain zip codes. Ultimately, every zip code is served as the season progresses.
4. Movement: TreesCharlotte is building new ways to reach residents through various marketing and communications initiatives to create a movement for all Charlotteans to care for our iconic urban forest.

**If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?**

TreesCharlotte has been very fortunate to have incredible in-kind support from the City of Charlotte since inception, specifically inclusive of a dedicated Arborist (FTE) who provides access to trucks, trailers, towing, auguring, the Tree Yard and seedling cooler; as well as provided office space.

As TreesCharlotte has grown the staff to more fully support the mission and intentionality of our impact, the city no longer has capacity to provide the needed space for effective work practices which will create a new line of expenses for the coming fiscal year estimated to be \$75k-100k for space and all accompanying costs. While we love sitting with our city partners in graciously provided space, we have to move into a more conducive work environment.

Of greater impact, in April 2024, our City of Charlotte Community Arborist dedicated resource (FTE), Frank Psaroudis, will be retiring and our understanding is the position will not be backfilled for TreesCharlotte support. We estimate the totality of this impact to be \$175k-250k as backfilling his work also requires a truck and trailer to haul required supplies for all of our programming.

With increased Financial Partnership funding, our team is hoping to backfill this significant asset to TreesCharlotte by hiring a new TreesCharlotte Community Arborist who will take on the responsibilities that were previously handled by Mr. Psaroudis. Responsibilities will include (but not limited to):

- monitoring CMS school plantings and identifying school planting candidates;
- conducting site assessments for upcoming tree plantings and tree care locations;
- applying arboricultural knowledge to make tree species recommendations for planting sites while taking into consideration the urban aspects of tree growth, landscape, utilities, wants and needs of the community, and biodiversity of site;
- delivering trees and mulch to events;
- auguring public land plantings;
- liaising with Landscape Management for access to grounds (specifically the yard and seedling cooler);
- providing arboriculture tree care to our tree inventory at the Landscape Management headquarters;
- coordinating tree orders, deliveries and drop zones for our tree plantings as well as marking tree locations;
- coordinate assistance of City of Charlotte Landscape Management employees (if continue to provide in the future) for plantings and adoptions within the City of Charlotte;
- coordinating and assisting at our events.

We respectfully submit this request for increased funding as we truly cannot accomplish all that we do without our city partners.

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Well-managed Government	<p>1. Treesilience will create a centering focus on tree equity as Charlotte’s overall tree canopy is not equally distributed. Underinvested communities of color, particularly those in “the Crescent” outside uptown, have fewer trees than wealthier neighborhoods and fewer resources to steward their existing trees. Local residents will be supported and activated to make a difference in Charlotte’s most under-canopied and disinvested neighborhoods.</p> <p>2. To make a substantial difference in the citywide issue of significant tree canopy loss occurring, TreesCharlotte needs to spark a movement of local residents working together to address tree canopy loss. To accomplish this, TreesCharlotte is launching a citywide engagement campaign entitled “Get Rooted” to activate a wide variety of constituencies throughout Charlotte, unlocking the potential of companies, neighborhoods, young professionals, families and civic leaders.</p> <p>3. It takes many more young trees to absorb the same amount of carbon as one old tree, with the largest 1% of trees accounting for half of the weight of carbon stored above ground (global statistic). It can also take 15-20 years for a young tree to become a large, canopy tree.</p> <p>4. In April 2024, our City of Charlotte loaned Community Arborist, Frank Psaroudis, will be retiring and our understanding is the position will not be backfilled in the same support function of TreesCharlotte. Recognizing this significant asset to TreesCharlotte, our team is hoping to backfill this position by hiring a new TreesCharlotte Community Arborist who will take on the responsibilities that were previously handled by Mr. Psaroudis, if funding is granted.</p> <p>5. Transition the TreesCharlotte office to a new space to accommodate our growing team which requires more space and resources. This will allow TreesCharlotte to grow in presence and in scale, in order</p>	<p>1a. Engage Ramblewood and McCrorey Heights households for Year 2 across objective opportunities.</p> <p>1b. Expand Treesilience initiative and impact.</p> <p>1c. Educate Treesilience communities on the ecobenefits of the trees in their neighborhood.</p> <p>1d. Plant and distribute trees to grow canopies.</p> <p>1e. Assess mature tree care needs.</p> <p>1f. Steward trees.</p> <p>2a. Manage the marketing engagement campaign throughout the duration of FY25.</p> <p>2b. Conduct a perception study at the conclusion of the Get Rooted campaign to gauge the success of the marketing campaign.</p> <p>2c. Increase newsletter subscribers, social media followers, sign-ups, web traffic and donors.</p> <p>3a. Educating Charlotteans on proper planting and care of trees will empower all residents to work towards preserving our precious canopy.</p> <p>3b. Preserve our canopy by returning to past planting locations to apply fresh mulch and prune young trees.</p> <p>4a. Hire and train new Community Arborist in FY25 that is able to provide arboricultural expertise in the work that TreesCharlotte executes for the Charlotte community.</p> <p>4b. Monitor school and other plantings to track survivorship and community impact.</p> <p>5a. Move into new office space to increase employee efficiency, teamwork and excellence.</p> <p>5b. Create a new educational center for volunteer trainings and community engagement events.</p> <p>6a. Create a charter that frames the work needed, supported, and actions required to successfully support city policy and tree</p>	<p>1a. Engage 15%+ of households in education, tree mapping, planting, and tree care and stewardship opportunities in Year 2 of Treesilience. 1b. Add 1 Treesilience neighborhood. Engage 15%+ of households. 1c. Deliver State of Your Canopy booklets to each Treesilience neighborhood by January 2025. 1d. 50 trees distributed (planted &amp; adopted). 1e. Assess 30 homes for mature tree care needs 1f. Steward trees at 40 homes. 2a. Key indicators &amp; campaign goals are being determined in March prior to the April 2024 launch. 2b. Conduct second perception study in February/March 2025 to pulse increase over past 3% awareness benchmark. 2c. Key indicators &amp; campaign goals are being determined in March prior to the April 2024 launch. 3a. Deliver 25 educational programs. 3b. Conduct 20 CommunityWoods &amp; School TreeCare and TreeKeeper events (pruning and mulching). 4a. Successfully transfer job responsibilities to new Community Arborist. 4b. Track previous plantings (up to 5 years) and detail statistics within Treeplotter and other tracking tools. 5a. Office successfully moved with all materials transferred to the new office space. 5b. Host 2 volunteer trainings and 1 community engagement event in the new office space. 6a. Research program design and opportunity by connecting with peers (Sustain CLT, Riverkeepers, CLC, etc.) and draft framework by end of</p>

Strategic Priority	Objective	Measures	Target
	to have a bigger impact in the City of Charlotte.  6. Create a Tree Advocate volunteer program to support Charlotteans in tree preservation.	protection efforts. 6b. Identify key staff member to lead along with TreeMAKs that have expressed an interest in growing this aspect of our work. 6c. Recruit additional members to spread the workload for the team.	July 2024. 6b. Set first Tree Ads meeting / training in August 2024. 6c. Grow volunteer team with planned meeting attendance to add passionate volunteers to the team.
Safe Communities	1. TreesCharlotte partners with qualifying communities and organizations to host tree planting events and adoptions called CommunityWoods. These organized events are a great way to build camaraderie, beautify our community and add to the city's diminishing canopy.  2. Grow and diversify our urban forest at schools because trees improve physical and mental health in children.	1a. Hold targeted number of CommunityWoods events and collect post event feedback.  2a. Build the tree canopies on school campuses.	1a. Host 10 CommunityWoods events and review post-event feedback at conclusion of planting season (April 2025) for efficiency and engagement enhancements.  2a. Engage with 6 schools to plant on their campus.
Great Neighborhoods	1. To grow and diversify Charlotte's urban forest to provide the benefits of a healthier environment to all residents, with a focus on adoptions for under-canopied and underserved communities.	1a. Plant and distribute trees throughout Charlotte. 1b. Plant and distribute seedlings across all of Charlotte.	1a. Plant & distribute 5,800 trees.  1b. Plant & distribute 2,500 seedlings.

### FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Well-managed Government	Provide programming in communities of color, underrepresented communities, and/or communities with low income.	A. While TreesCharlotte serves all residents of Charlotte, we focus our efforts in underrepresented communities. One way is through our Treesilience initiative that selects neighborhoods with median household income is less than 50% of Charlotte median household income and the population is greater than 80% minority ethnicities; as well as low canopied defined as less than 40%. B. Grow the Treesilience initiative to expand tree equity impact where most needed. C. Increase Treesilience Mature Canopy Care participation through enhanced application process and neighbor-endorsed support.	A. Continue engagement with Ramblewood and McCrorey Heights neighborhoods to host mature tree care, planted front yard trees and hosted tree adoptions for residents in those neighborhoods. B. Add 1-2 new Treesilience neighborhoods in FY25. C. Increase MCC applications by 10%.
Well-managed Government	Create greater accessibility to be more inclusive of our ESL community members.	A. Create more marketing materials and applications in additional languages (e.g. Spanish) to increase inclusivity to our ESL community members. B. Increase CommunityWoods applications in predominantly ESL communities.	A. Track ESL households through our application processes. B. Obtain at least three Treesilience applications 3 from ESL households. Obtain at least one CommunityWoods

Strategic Priority	Objective	Measures	Target
			application in a predominately ESL community.
Safe Communities	Provide free trees to Charlotteans to grow our urban forest, with specific focus on underrepresented communities through targeted Zip code TreeAdoptions.	Target underrepresented communities through specific marketing efforts aligning to those specific zip codes (ex. Crescent Zip Code TreeAdoption.	Crescent Zip Code TreeAdoption target for FY25 is 260 households adopting 475 trees (increase over FY24).
Great Neighborhoods	Continue to focus the majority of our tree planting efforts in Charlotte’s crescent, which historically contains the most under-canopied and underserved neighborhoods in Charlotte.	Through our Community Engagement Manager, create more connections with organizations and community members within crescent neighborhoods to find CommunityWoods opportunities within these communities.	Focus 60% of CommunityWoods projects in Charlotte’s crescent.

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries * (partial funding to cover loss of City FTE)	\$ 522,674	\$ 525,600	\$ 750,000	\$ 100,000	13.3%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits * (partial funding to cover loss of City FTE)	\$ 21,134	\$ 29,070	\$ 38,600	\$ 3,000	7.8%
<b>Subtotal Personnel Expenses</b>	<b>\$ 543,808</b>	<b>\$ 554,670</b>	<b>\$ 788,600</b>	<b>\$ 103,000</b>	<b>13.1%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 18,979	\$ 50,000	\$ 75,000	\$ 35,000	46.7%
Facilities (e.g. rent, utilities) ** (moving out of City office space due to growth)	\$ -	\$ -	\$ 40,000	\$ 40,000	100.0%
Office Supplies	\$ 12,612	\$ 8,000	\$ 12,000	\$ 3,000	25.0%
Travel & Training	\$ 9,943	\$ 7,000	\$ 6,500	\$ 500	7.7%
Technology	\$ 14,713	\$ 14,800	\$ 17,700	\$ 5,000	28.2%
Tree Purchase (NeighborWoods & reforestation)	\$ 215,396	\$ 260,000	\$ 235,000	\$ 136,100	57.9%
Tree Care (Water, Augur, Mulch/Delivery and Mature Tree Care)	\$ 180,220	\$ 230,000	\$ 340,000	\$ 110,000	32.4%
Education Programs	\$ 3,334	\$ 20,000	\$ 7,500	\$ 2,000	26.7%
Program supplies and Expense	\$ 39,296	\$ 30,000	\$ 20,000	\$ 8,000	40.0%
Fundraising Supply and Expense	\$ 15,421	\$ 20,000	\$ 25,000	\$ -	0.0%
Payroll Taxes	\$ 40,277	\$ 43,643	\$ 60,000	\$ -	0.0%
Accounting & Auditing	\$ 14,283	\$ 16,000	\$ 15,000	\$ -	0.0%
Event & Operations Management	\$ 1,963	\$ 2,200	\$ 2,000	\$ -	0.0%
Investment Management	\$ 10,224	\$ 20,000	\$ 5,000	\$ -	0.0%
Professional Fees	\$ 58,137	\$ 20,000	\$ 40,000	\$ 24,400	61.0%
Membership Dues Subscriptions	\$ 775	\$ 1,000	\$ 500	\$ -	0.0%
Postage and Shipping	\$ 5,012	\$ 4,600	\$ 6,500	\$ -	0.0%
Bank Fees	\$ 3,322	\$ 3,200	\$ 3,500	\$ -	0.0%
Meals & Entertainment	\$ 2,108	\$ 1,500	\$ 2,400	\$ -	0.0%
Insurance	\$ 5,353	\$ 3,800	\$ 12,000	\$ -	0.0%
Vehicle	\$ 575	\$ 2,100	\$ 2,500	\$ -	0.0%
Miscellaneous	\$ 68,490	\$ 2,500	\$ 2,000	\$ -	0.0%
Capital Initiatives (Get Rooted Outreach Campaign)	\$ -	\$ -	\$ 110,000	\$ 33,000	30.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 720,432</b>	<b>\$ 760,343</b>	<b>\$ 1,040,100</b>	<b>\$ 397,000</b>	<b>38.2%</b>
<b>Total Expenditures</b>	<b>\$ 1,264,240</b>	<b>\$ 1,315,013</b>	<b>\$ 1,828,700</b>	<b>\$ 500,000</b>	<b>27.3%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 312,500	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ 187,026	\$ 192,500	\$ 225,000
Donor Contributions	\$ 298,389	\$ 310,000	\$ 335,000
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 535,032	\$ 650,000	\$ 500,000
<b>Total Revenues</b>	<b>\$1,332,947</b>	<b>\$ 1,152,500</b>	<b>\$ 1,060,000</b>

## **Current Board of Directors**

Thus Morton  
Todd Collins  
Kodwo Ghartey Tagoe  
Paul Kardous  
Susan McKeithen  
Jen Reilly  
Chris Thomas

Evan Bass  
Tracy Dodson  
Mary Hall  
Margaret Marshall  
Audra Nunn Tyree  
Stoney Sellars

Peggy Brookhouse  
Patrick Franklin  
Leslie Johnson  
Susan McDonough  
John Petrone  
John Sherman

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**GENERAL FUND –  
Financial Partners  
New Applicants**

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## FY 2025 Financial Partner Agency Summary

Agency Name: **BE YOU BE GREAT, Inc.**

### Agency Description

BE YOU BE GREAT began with a simple yet powerful mission: to inspire individuals to embrace their unique selves and achieve greatness. Our journey started over 20 years ago, ignited by the unwavering commitment of our CEO and founder, Big RED The Voice, Willis Draughn Jr. Throughout these decades, our community has consistently turned to us in times of need, and we've stood tall, ready to serve. Our founder, affectionately known as Big RED, has been the beacon of support for our city. From advocating for families affected by tragedies to assisting city workers in their times of need, from providing aid to displaced seniors during unforeseen disasters to guiding and uplifting the youth through mentorship programs, community initiatives, and mental health support, BE YOU BE GREAT has been at the forefront of addressing diverse community needs.

The heart of our story lies in our unwavering dedication to fostering unity, empathy, and empowerment. We've grown from answering the calls for support to creating impactful programs that touch lives and uplift spirits. Our commitment to 'BE YOU BE GREAT' is not just a mantra—it's a movement. Join us as we continue this journey of making a positive difference in the lives of individuals, families, and our community as a whole.

### Agency Established

2019

### Agency Funding Request

\$725,333

### Population Served

64,988 Volunteers & Clients Served: Youth - Adults and Seniors: 1,001,058

SHOW ME HOW TO ACT: 467,653 CLIENTS SERVED IN 2023

Target Audience: Youth in school systems

Objective: This program aims to tackle issues like anti-bullying and gun violence. It likely includes educational workshops, activities, and discussions to promote understanding, empathy, and non-violent conflict resolution among students. The program also aims to "acting" in performing arts to learn through actions during plays, seminars, pep rallies.

BEYOND THE BLUE LIGHTS: 4,370 CLIENTS SERVED IN 2023

Target Audience: Police force and community members

Objective: This program is designed to strengthen the relationship between the police and the community they serve. It probably involves community engagement initiatives, open dialogues, and joint community-police events that help build trust and understanding, focusing on connecting with the community proactively, not just during emergencies.

GREATER HOUSE OF HOPE, LOVE & FAITH: 7,934 CLIENTS SERVED IN 2023

Target Audience: Individuals and families seeking housing

Objective: This is likely a housing program aimed at providing affordable housing options. It may include services like financial counseling, assistance with down payments, and support in finding suitable and affordable housing.

WHEREs The Reading: 315,092 CLIENTS SERVED IN 2023

Target Audience: General public, possibly with a focus on youth and children

Objective: reading clubs, literacy workshops, book donation drives, and events to encourage reading in the community.

**GETT AT IT FITNESS: 158,768 CLIENTS SERVED IN 2023**

Target Audience: General public, with a focus on youth and seniors

Objective: This wellness and health program is designed to promote physical fitness and healthy eating habits. It likely includes workout sessions, nutritional education, meal planning guidance, and tips on exercising correctly and safely.

**SHOW ME HOW TO PAINT: 11,342 CLIENTS SERVED IN 2023**

Target Audience: Individuals interested in painting, both for artistic expression and practical application. Objective: This program combines art with practical skills, teaching participants how to paint in various contexts, from artistic painting to house and commercial painting. It offers a blend of creative expression and vocational training.

**SHOW ME HOW TO BE A MECHANIC: 7,510 CLIENTS SERVED IN 2023**

Target Audience: Youth and seniors interested in automotive mechanics.

Objective: Focused on automotive repair and maintenance, this program provides hands-on training in working on cars and trucks. It's a vocational training program aimed at equipping participants with marketable skills in the mechanic field.

**KUTTIN OF THE MINDS: 9,781 CLIENTS SERVED IN 2023**

Master Kutz Barber Shop

Target Audience: Youth and seniors, with a focus on mentorship.

Objective: This unique program uses barbering as a platform for mentorship. It teaches barbering skills and provides a space for participants to engage in meaningful conversations, exchange life experiences, and build supportive relationships.

**SHOW ME HOW TO DETAIL THROUGH ON TIME SHINE: 5,576 CLIENTS SERVED IN 2023**

Target Audience: Individuals interested in car detailing

Objective: This program focuses on training participants in mobile car detailing. It offers practical skills for maintaining and enhancing the appearance of vehicles, potentially leading to opportunities in the auto detailing business.

**SENIOR EMERGENCY RELIEF PROGRAM: 13,032 CLIENTS SERVED IN 2023**

Target Audience: Senior in need of housing support, educational and emotional support

Objective: This program focuses on providing assistance to senior housing repairs, homelessness, preparing for GED testing, emotional support.

**Council Priority Area(s)**



Safe  
Communities



Great  
Neighborhoods



Workforce & Business  
Development



Well-Managed  
Government

**Describe the activities that will be supported through requested city funding**

SHOW ME HOW TO ACT:

Target Audience: Youth in school systems

Objective: This program aims to tackle issues like anti-bullying and gun violence. It likely includes educational workshops, activities, and discussions to promote understanding, empathy, and non-violent conflict resolution among students. The program also aims to “acting” in performing arts to learn through actions during plays, seminars, pep rallies.

BEYOND THE BLUE LIGHTS:

Target Audience: Police force and community members

Objective: This program is designed to strengthen the relationship between the police and the community they serve. It probably involves community engagement initiatives, open dialogues, and joint community-police events that help build trust and understanding, focusing on connecting with the community proactively, not just during emergencies.

GREATER HOUSE OF HOPE, LOVE & FAITH:

Target Audience: Individuals and families seeking housing

Objective: This is likely a housing program aimed at providing affordable housing options. It may include services like financial counseling, assistance with down payments, and support in finding suitable and affordable housing.

WHEREs The Reading:

Target Audience: General public, possibly with a focus on youth and children

Objective: reading clubs, literacy workshops, book donation drives, and events to encourage reading in the community.

GETT AT IT FITNESS:

Target Audience: General public, with a focus on youth and seniors

Objective: This wellness and health program is designed to promote physical fitness and healthy eating habits. It likely includes workout sessions, nutritional education, meal planning guidance, and tips on exercising correctly and safely.

SHOW ME HOW TO PAINT:

Target Audience: Individuals interested in painting, both for artistic expression and practical application. Objective: This program combines art with practical skills, teaching participants how to paint in various contexts, from artistic painting to house and commercial painting. It offers a blend of creative expression and vocational training.

SHOW ME HOW TO BE A MECHANIC:

Target Audience: Youth and seniors interested in automotive mechanics.

Objective: Focused on automotive repair and maintenance, this program provides hands-on training in working on cars and trucks. It's a vocational training program aimed at equipping participants with marketable skills in the mechanic field.

KUTTIN OF THE MINDS:

Master Kutz Barber Shop

Target Audience: Youth and seniors, with a focus on mentorship.

Objective: This unique program uses barbering as a platform for mentorship. It teaches barbering skills and provides a space for participants to engage in meaningful conversations, exchange life experiences, and build supportive relationships.

SHOW ME HOW TO DETAIL THROUGH ON TIME SHINE:

Target Audience: Individuals interested in car detailing

Objective: This program focuses on training participants in mobile car detailing. It offers practical skills for maintaining and enhancing the appearance of vehicles, potentially leading to opportunities in the auto detailing business.

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Provide affordable alternative training for skilled Barbering, Painting, Auto Mechanic and Detailing	# of students participating in programs and employed within 6 to 9 months after completion of program.	1,200 participants
Safe Communities	Provide mentoring, training and volunteer development program serving the community.	Graduate youth both troubled and underserved. Followed with continued mentoring to adulthood. And serving youth on how to make proper choices other than violence.	15,000 participants
Great Neighborhoods	Provide resource to the seniors to receive home repair, GED training, and other support services for better quality of life.	Provide seniors with resources to assist them with services to stay in the home and to receive GED support training.	<i>Not provided</i>
Well-Managed Government	Advocating for families affected by tragedies. Empowering seniors, youths and adults by educating and being a voice for their community. Partnering with Police, Political Leaders, other stakeholders.	Provide this resource to residents of the city of Charlotte in underserved communities. Conducting community events, community celebrations, parades	15,000 residents
Well-Managed Government	BEYOND THE BLUE LIGHTS: Provide support to the Police	This program is designed to strengthen the relationship between the police and the community they serve. It probably involves community engagement initiatives, open dialogues, and joint community-police events that help build trust and understanding, focusing on connecting with the community proactively, not just during emergencies.	<i>Not provided</i>

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Safe Communities	A program is designed to strengthen the relationship between the police and the community they serve. It probably involves community engagement initiatives, open dialogues, and joint community-police events that help build trust and understanding, focusing on connecting with the community proactively, not just during emergencies.	community participants to engage in outreach events and services	15,000 participants
Safe Communities	A housing program aimed at providing affordable housing options. It may include services like financial counseling, assistance with down payments, and support in finding suitable and affordable housing.	Participants served	3,000 participants
Safe Communities	Reading clubs, literacy workshops, book donation drives, and events to encourage reading in the community.	Clients served	10,000 CLIENTS
Safe Communities	Focused on automotive repair and maintenance, this program provides hands-on training in working on cars and trucks.	Clients served	3,000 clients

Strategic Priority	Objective	Measures	Target
	It's a vocational training program aimed at equipping participants with marketable skills in the mechanic field.		
Safe Communities	This unique program uses barbering as a platform for mentorship. It teaches barbering skills and provides a space for participants to engage in meaningful conversations, exchange life experiences, and build supportive relationships.	Clients served	2,500 clients
Safe Communities	This wellness and health program is designed to promote physical fitness and healthy eating habits. It likely includes workout sessions, nutritional education, meal planning guidance, and tips on exercising correctly and safely.	Clients served	3,000 clients
Safe Communities	This program aims to tackle issues like anti-bullying and gun violence. It likely includes educational workshops, activities, and discussions to promote understanding, empathy, and non-violent conflict resolution among students. The program also aims to acting in performing arts to learn through actions during plays , seminars, pep rallies.	Clients served	15,000 clients

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# FY 2025 Financial Partner Agency Summary

Agency Name: **Bright Hopes**

## Agency Description

Bright Hopes collaborates with school support teams with a focus on the Grier Heights community and Wallace Road. We enhance school efforts to support students who do not responsibly attend school. We implement school attendance challenges, connect families with resources and provide needed items that enable youth to stay connected to learning. During COVID-19, we provided headphones to four schools who identified students in need of them to stay connected to their class. The school provided students with a Chromebook, however students needed headphones to reduce noise and distractions in their home. Many students shared study areas with their siblings and learning was challenged. They could mute so others could learn but they could not control activities in their home. We delivered food to families who could not get to food distribution sites. We also assisted families with connecting to free and or low-cost places for required school immunizations. Hundreds of kindergarten students get put out of school each year because they do not have the required immunizations. Snacks are provided to teachers for students who are hungry. It is hard to think about learning when you are hungry.

For several years, Bright Hopes provided a free Strong Start pre-kindergarten six session class for low-income students from one of our most challenging communities. Students gained skills that gave them a strong start toward a positive school year. Parents were given information of resources that could help keep youth learning. Students received two books to take home and add or start their home library every time they attended. Bright Hopes Parent Power project assisted parents with utilizing Charlotte Mecklenburg school tool Parent Assist. Parent Assist allowed parents to check their child's school attendance and other things that helped them stay connected to their child's learning. We partnered with an elementary school and served identified students who missed 10 or more days from school. Each child was given an alarm clock and parents received support to address barriers that caused their child to miss school. We challenged all students in that school to reach toward perfect attendance and recognized students monthly who maintained this status. This enticed other students to set responsible attendance goals. Those youth who maintained perfect attendance for the year got invited to a special end of year field trip. Community volunteers and school staff helped with these activities.

## Agency Established

2008

## Agency Funding Request

\$10,000

## Population Served

We serve schools, communities and groups who have been identified as having great support needs based on things like income below the poverty limit, Title I schools, food deserts and or high crime. Our focus areas have been the Grier Heights community and Wallace Road. Our population has been primarily people of color.

## Council Priority Area(s)



## Describe the activities that will be supported through requested city funding

Bright Hopes focus is responsible school attendance. When students do not responsibly attend school, they miss opportunities to gain needed knowledge for their success. At times it can be as simple as identifying a different person to responsibly get everyone up and out for school. We work to keep youth excited about being in school.

When students are excited, they can often get their parents excited. Think about how often we do things just because a child wanted us to do it. We support parents by addressing school attendance barriers. Funding will be used to provide and connect parents to community resources, motivate and encourage elementary age youth as it relates to responsible school attendance and support teachers. We connect with school support teams and implement activities that enhance what they are doing, and we work to encourage responsible school attendance. Funding will be used to cover the cost of activities and projects implemented by Bright Hopes that encourage responsible school attendance. It will also be used to cover the cost of an audit and insurance.

### FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Safe Communities	Responsible school attendance	Improved school attendance and performance.	Cut absentees by 50%

### FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Safe Communities	Identify barriers to responsible attendance.	Provide resources, information and support	Improved attendance by 50%

### Overall Agency Budget

Expenditures FY 2023- FY 2025						
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget	
<b>Personnel</b>						
Salaries	\$ 5,299	\$ 18,230	\$ 36,461	\$ 5,000	13.7%	
Merit	\$ -	\$ -	\$ -	\$ -	0.0%	
Benefits	\$ -	\$ -	\$ -	\$ -	0.0%	
<b>Subtotal Personnel Expenses</b>	<b>\$ 5,299</b>	<b>\$ 18,230</b>	<b>\$ 36,461</b>	<b>\$ 5,000</b>	<b>14%</b>	
<b>Operating</b>						
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ 2,000	\$ 4,000	\$ -	0.0%	
Communications (e.g. publishing, marketing)	\$ 1,204	\$ 2,500	\$ 5,000	\$ -	0.0%	
Facilities (e.g. rent, utilities)	\$ 3,840	\$ 3,840	\$ 7,680	\$ -	0.0%	
Office Supplies	\$ -	\$ 2,000	\$ 4,000	\$ -	0.0%	
Travel & Training	\$ -	\$ 500	\$ 1,000	\$ -	0.0%	
Technology	\$ -	\$ 2,000	\$ 4,000	\$ -	0.0%	
Accounting Fees	\$ 930	\$ 2,500	\$ 5,000	\$ -	0.0%	
Legal Fees	\$ 150	\$ 2,000	\$ 4,000	\$ -	0.0%	
Supplies/ Food/ Supports	\$ 5,113	\$ 12,630	\$ 25,259	\$ 5,000	0.0%	
Bank Fee	\$ 154	\$ 200	\$ 400	\$ -	0.0%	
Board Meeting	\$ 61	\$ 100	\$ 200	\$ -	0.0%	
Youth Books	\$ 1,500	\$ -	\$ -	\$ -	0.0%	
Professional Development	\$ -	\$ 1,500	\$ 3,000	\$ -	0.0%	
<b>Subtotal Operating Expenses</b>	<b>\$ 12,952</b>	<b>\$ 31,770</b>	<b>\$ 63,539</b>	<b>\$ 5,000</b>	<b>7.9%</b>	
<b>Total Expenditures</b>	<b>\$ 18,251</b>	<b>\$ 50,000</b>	<b>\$ 100,000</b>	<b>\$ 10,000</b>	<b>10.0%</b>	

Revenues			
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ 4,500.0	\$ 10,000
Mecklenburg County Funding	\$ 10,000	\$ 10,000	\$ 10,000
Foundation Grants & Funding	\$ 2,400	\$ 28,000	\$ 60,000
Donor Contributions	\$ 4,085	\$ 5,000	\$ 10,000
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 6,439	\$ 7,000	\$ 10,000
<b>Total Revenues</b>	<b>\$ 22,924</b>	<b>\$ 54,500</b>	<b>\$ 100,000</b>

**Current Board of Directors**

Gwendolyn Forney      Shirley Crawford      Tawana Gladden      Bonnie Phillips  
 Xiomara Livingston

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# FY 2025 Financial Partner Agency Summary

## Agency Name: **Carolinas Asian American Chamber of Commerce**

### **Agency Description**

#### Organization

Carolinas Asian-American Chamber of Commerce (CAACC) was founded by Dr. Ky-Hyun Chun in 1999. It is an all-volunteer organization, with a nine-member board (Vietnamese, Japanese, Chinese, Indian, Filipino), responsible to drive all our programs. Three affiliates are partners to CAACC, Asian American Foundations for the Carolinas (AAFC), Charlotte Dragon Boat Association (CDBA), Universal Institute of Successful Aging in the Carolinas (UISAC) and Charlotte Asian Heritage Association (CAHA). Funding for our operations comes mostly from corporate sponsorship of our Asian Festival/Dragon Boat Race annual event in May.

#### Operation Overview (2006-Present)

##### Leadership Development

Sponsorship of Asian community members to undertake the leadership training program developed by the Community Building Initiatives (CBI). Graduates are actively serving the community, and some gained full-time employment in part due to this program. Another program at CBI, the U-40 (under 40) leadership development, was also attended by CAACC sponsored members. Among our key missions, CAACC functioned as a platform to support members to work toward their aspired goals in community service. Three major affiliates were founded, now independent, Charlotte Dragon Boat Association (CDBA), Charlotte Asian Heritage Association (CAHA), responsible for erecting the Gandhi statue in uptown Charlotte and, UISAC (Universal Institute of Successful Ageing in the Carolinas), partner of the Chamber with significant impact in serving the Asian seniors and the refugee community.

##### Business Support

Our on-demand business service was organized to support local Asian business owners. While all these owners are well-versed in their day-to-day operation, we often served as a resource to advise/resolve their unique business needs, such as mediation, clearance for store expansion, business relocation, access to micro-lending, legal and other referrals. During the pandemic, we continue to provide financial aid information at local, state, and federal source, and to apply for COVID healthcare grant on behalf of the refugee families and to assist the refugee new business owners to gain waiver in simplifying the financial support application process.

##### Education Focus

Tutoring and mentoring of the underperforming Asian high school students- nearly all are refugees notably from Myanmar and the Montagnard from Vietnam. Many graduated from high school and some gained entry to CACC with our team helping them to navigate the application process. The project continued through 2015. FAS (Filipino American Spirit) was launched to teach youngsters Tagalog, the Filipino national language, to ensure the treasured heritage of the island nation will be respected and practiced in future generations. CAACC board members of the founding board of trustees of a then new education institution in North Carolina in 2018, East Voyager Academy, a Chinese language immersion school, the first in North Carolina and the eight public charter school in the nation. The network and local/state information gained in servicing the community through CAACC was invaluable to gain the State Board of Education approval.

##### Culture Enrichment

committed sponsorship was credited for allowing our introducing a cross-cultural, community building event in Dragon Boat racing to the region. Launched in 2006, the first in the Carolinas, the event expanded rapidly and today, there are more than twelve events within a 250-mile radius in several states. Each year, we welcome several out of state teams, including one from Canada. The Charlotte Dragon Boat/Asian Festival is the most colorful, program-packed event held appropriately in May to celebrate the Asian-Pacific Heritage month. The festival has

been recognized in 2018 and 2019 as one of best May events by the Southeast Tourism Board. The Fall Unity Festival was inaugurated in 2008 at the dedication of the Gandhi statue uptown. The tradition continues with focus on wellness and peace.

In 2017, the Charlotte Thanksgiving Day Parade welcomed the two hundred plus-people Asian Community unit, organized by CAACC, in the procession, featuring the giant Golden Dragon, Chinese and Indian dance troupe, Peaceful Dragon, accompanied by a walking group of with colorful traditional national dresses. In 2023, CAACC partnered with the Asian American Foundation for the Carolinas (AFFC) to host an AAPI community-curated three-month exhibit, A JOURNEY OF HOPE, at the Charlotte Museum of History, the first of its kind in the Southeast.

### Community Engagement

While the stigma of Asian being a model minority has been dispelled, the long-held belief that the Asians are self-sufficient and independent may still be true today, but mostly applies to one's behavior within one's own ethnic group. There is still a lack of interactions among groups in such a diverse community, but, to the outside, we are collectively identified as the AAPI community and conducting ourselves as a connected, cohesive entity. The onset of the pandemic and the rise of Anti-Asian hate crime amply exposed the vulnerability of our community, especially among the underserved in seeking healthcare, social service, and small business assistance. We have been actively engaging all Asian community groups, especially the underserved, such as the Myanmar (/Burmese), Bhutanese, Cambodians, Hmong, and Laotians to transform the "silo" mindset and behavior to a collaborative relationship. Our goal is collaborating with them as partners in social, economic, health/well care and cultural areas to make them and the rest of our community feel connected and engaged in moving forward as a family member of the greater Charlotte community we call home. The financial Partner contract will significantly bolster our financial capital to reach this goal.

### Agency Established

1999

### Agency Funding Request

\$246,000

### Population Served

Indian, Vietnamese, Chinese, Filipino, Korean, Montagnard. Bhutanese, Cambodian, Myanmar, Laotian, Hmong, Nepalis, Sri Lankan, Taiwanese, Thai, Bangladesh, Indonesian, Japanese, Malaysian, Mongolian, Pakistan, Singaporean, Tonga.

### Council Priority Area(s)



Safe  
Communities



Great  
Neighborhoods



Well-Managed  
Government



Workforce & Business  
Development

### Describe the activities that will be supported through requested city funding

#### Workforce Development

\*Financial literacy workshops & seminars for small business- Trainer and translator fee (20 sessions 20 cohort/session)

\*Vocational training- Program fee (16)

\*Soft skill training- Trainer/translator fee (2 sessions, 20 cohort/session)

#### Safe Community

\*Implement pilot program with Installation of security device and safe sidewalk in selected neighborhoods (40 homes)

Great Neighborhood

\*Community gardens (2)

\*Town Hall events (4) for 50 each with meals or refreshments

\*Organized sports activities (2) with refreshments and team tops Admin Expense

\*Stipend for program operating team of 3

Communication

\*Web site, social media, telecom

\*AAPI community-wide networking events (2)

**FY2025 Performance Measures and Targets**

Strategic Priority	Objective	Measures	Target
Safe Communities	<ol style="list-style-type: none"> <li>Continue focus on Asian small business development for growth and profitability</li> <li>Enhance young Asian adults and professionals upward mobility through workforce development</li> </ol>	<p>Training certificates, coach/trainer feedback and self-assessment report</p> <ol style="list-style-type: none"> <li>Financial literacy in business operation, succession planning and personal investment</li> <li>Vocation training and job placement</li> <li>Soft skills training for young professionals</li> </ol>	<ol style="list-style-type: none"> <li>Participants in Asian Small business development- Over 12 ethnicity or more than 50% of the AAPI community groups are represented.</li> <li>Healthcare service navigator trained-7.</li> <li>Trainer/coach rating- Over 80 passed.</li> <li>Self-assessment report- over 80% positive</li> </ol>
Safe Communities	Ensure a safe and healthy neighborhood for the Asian community.	<ol style="list-style-type: none"> <li>Advocate and seek partnership to improve safety and walkability of selected neighborhood, e.g., Steele Creek, by installing cameras, street- lights and repair side- walk.</li> <li>Adopt the use of a popular portal, Nextdoor.com, to enhance communications among families in the neighborhood.</li> <li>Collaborate with local healthcare provider for scheduled mobile clinic to the neighborhood for diagnostic and preventive care procedure.</li> <li>Evaluate progress through neighborhood survey via respective community representatives.</li> </ol>	<ol style="list-style-type: none"> <li>Burglary statistics in the Steele Creek area drop 40%.</li> <li>Neighborhood communication media, Nextdoor.com- Regularity, frequency of postings across the community served.</li> <li>Healthcare provider semi-annual visits to 2-3 Asian community.</li> <li>Conduct Neighborhood Safety Survey via the community representatives- 3 times/yr.</li> <li>Coordination meeting- Asian community representatives and law enforcement agency: CMPD- 3/yr. FBI- 2/yr.</li> </ol>
Great Neighborhoods	To overcome the long-standing challenge of the “Belongingness” issue by identifying and developing opportunities to significantly improve the interactions first, among the ethnically diverse Asian families in the neighborhoods, followed by connecting with the entire community.	<ol style="list-style-type: none"> <li>Seek partnership with Park &amp; Recreation Department to build community garden, play area, and access to nearby recreation center.</li> <li>Initiate Town Hall or networking format informational gathering for the neighborhood</li> <li>Organize sport/recreational activities within and between the neighborhoods.</li> </ol>	<ol style="list-style-type: none"> <li>Two pilot programs in year one with park &amp; Recreation and three in year two.</li> <li>Two Town Hall or networking events in year one with two neighborhood and two with three neighborhood in year two.</li> <li>One sporting/recreational event with one and multiple neighborhoods in year 1. Increase to two of the same in year 2.</li> </ol>

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Ensure the city demonstrates inclusion through commitment to and focus on equity, engagement, and environment.	1.Submit quarterly progress report on all identified project activities with highlights on the underserved Asian community. 2.Convene roundtable sessions between Councilmembers and the underserved Asian community groups.	1. Timeliness and content of the Quarterly report and roundtable sessions & Feedback from the City officials.

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	1.Configure the leading AAPI community leadership organizations to facilitate communications to achieve the target outcome of all programs. 2.Identify and implement project activities specific to the underserved Asian community groups in all four of the proposed program areas.	1.Ensure all underserved Asian community groups are represented in the newly configured organization structure. 2.Implement projects to meet the identified needs in workforce development and small business support of the underserved Asia community, e.g., Bhutanese, Mongolians, Montagnards, Myanmar and Nepali.	1. Vocational/small business training certificates received among the underserved, e.g., Bhutanese, Mongolian, Montagnard, Myanmar and Nepali- 70% 2. Healthcare service navigators trained- 5. 3. Job placement of the certified trainees- 80% 4. Community garden- 3.
Safe Communities	Ensure a safe and healthy neighborhood, with families well connected with each other.	1.Improve safety by installing streetlights, sidewalk, and pavement repair. 2.Initiate a pilot HOA type program in the high-density neighborhood, e.g., the Montagnards in Westerly Hills and the Burmese in Sheffield Park. 3.Organize on-site or mobile Clinic for diagnostic and preventive care procedures. 4.Conduct Neighborhood Survey via community representative in respective neighborhoods.	1. Safety improvement work completed or in progress for two neighborhoods, e.g., Westerly Hills, Sheffield Park and Lakewood. 2. The outcome of the pilot HOA type program will be used to guide the next step, such as merging it with an established HOA in the neighborhood, or a standalone HOA like organization. 3. Two mobile clinics for at least three underserved communities 4. Conduct Neighborhood Safety Survey- 3 times/yr. 5. Coordination meeting- Asian community representatives and law enforcement agency: CMPD- 3/yr. FBI- 2/yr.
	To overcome the long-standing challenge of the “Belongingness” issue by identifying and developing opportunities to significantly improve the interactions with the rest of the AAPI community.	1.Seek partnership with Park & Recreation Department to build community garden, play area, and access to nearby recreation center. 2.Initiate Town Hall or networking format informational gathering at their churches first, then at other popular venues such as the Asian Library, East	1. Two pilot projects with Park & Recreation Department in year 1 and two more in year 2. 2. Accept performance at the 2025 Charlotte Asian Festival 3. Three smaller scale (less than (50) Town Hall or

Strategic Priority	Objective	Measures	Target
		Voyager Academy and Hindu Center.	and three larger scale events (80 plus) in other venues in year 2. 4. Decision on initiating/terminating the mentor/tutor of the high school students by end of 1Q

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries- contractors (3 officers, 1 admin assistant)	\$ -	\$ 67,400	\$ 60,000	\$ 50,000	83.3%
<b>Subtotal Personnel Expenses</b>	<b>\$ -</b>	<b>\$ 67,400</b>	<b>\$ 60,000</b>	<b>\$ 50,000</b>	<b>83.3%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ 8,000	\$ 8,000	\$ 7,000	87.5%
Communications (e.g. web hosting, publishing, marketing, software lease, paper, other supplies)	\$ 3,151	\$ 28,000	\$ 8,000	\$ 5,000	62.5%
Facilities (e.g. rent, utilities)	\$ -	\$ 500	\$ -	\$ -	0.0%
Technology	\$ 1,692	\$ 16,800	\$ 7,000	\$ 6,000	85.7%
Monthly AAPI financial literacy workshop (with translations)	\$ -	\$ 40,800	\$ 40,000	\$ 30,000	75.0%
Software (QuickBooks) lease for the literacy workshop	\$ -		\$ 8,000	\$ 8,000	100.0%
AAPI vocational training program fee (targeted underserved community)	\$ -	\$ -	\$ 70,000	\$ 50,000	71.4%
Soft skill training for AAPI small business	\$ -	\$ -	\$ 7,000	\$ 5,000	71.4%
Monthly small business workshop open to all	\$ -	\$ 19,600		\$ -	0.0%
AAPI Young professionals engagement (soft skill workshop, networking)	\$ -	\$ -	\$ 18,000	\$ -	0.0%
AAPI Small business outreach	\$ -	\$ 20,100	\$ 7,000	\$ 5,320	76.0%
AAPI mobile Town Hall (4)- 50 attendees each	\$ -		\$ 6,000	\$ 6,000	100.0%
AAPI small business awareness campaign	\$ -	\$ 30,000	\$ -	\$ -	0.0%
AAPI small business mobile town square (Pop-ups")	\$ -	\$ 2,600	\$ -	\$ -	0.0%
Home/neighborhood security pilot program (40 homes)	\$ -	\$ -	\$ 71,200	\$ 60,000	84.3%
Organize AAPI neighborhood sport activities (2), 4 teams each	\$ -		\$ 1,680	\$ 1,680	100.0%
Community Gardens	\$ -	\$ -	\$ 3,000	\$ 3,000	100.0%
2024 Kick-off networking event	\$ -	\$ 5,000	\$ 5,000	\$ 3,000	60.0%
2024 Annual recognition and gala	\$ -	\$ 11,200	\$ 11,000	\$ 6,000	54.5%
Programming- Contracts, venues, speakers	\$24,800	\$ -	\$ -	\$ -	0.0%
Reimbursement (members project expenses)	\$ 5,952	\$ -	\$ -	\$ -	0.0%
Sponsorship/donations	\$ 3,050	\$ -	\$ -	\$ -	0.0%
Insurance	\$ 395	\$ -	\$ -	\$ -	0.0%
Support AAPI underserved community workforce development by partner (AAFC)	\$ -	\$ 15,000	\$ -	\$ -	0.0%
Sponsorship/donations	\$ -	\$ 6,000	\$ -	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$39,040</b>	<b>\$271,000</b>	<b>\$ 330,880</b>	<b>\$ 246,000</b>	<b>74.3%</b>
Contingency	\$ -	\$ 2,000	\$ 10,000	\$ -	0.0%
<b>Total Expenditures</b>	<b>\$39,040</b>	<b>\$273,000</b>	<b>\$ 340,880</b>	<b>\$ 246,000</b>	<b>72.2%</b>

Revenues			
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ 20,000	\$ 15,000	\$ 45,000
Donor Contributions	\$ 6,000	\$ -	\$ 5,000
Service Fees(Festival)	\$ 3,050	\$ 6,000	\$ 13,000
Other Revenue (Membership, AAPI partners)	\$ 10,250	\$ 4,000	\$ 31,990
<b>Charlotte City Funding</b>	\$250,000	\$ 250,000	\$ 246,000
<b>Total Revenues</b>	<b>\$ 39,300</b>	<b>\$ 275,000</b>	<b>\$ 340,990</b>

### Current Board of Directors

Dr. Nini Bautista	Nimish Bhatt
Div Bhingradia	Alex Bui
Eileen Cai	Dr. John Chen
Lena Chun	Ann Gonzales
Binh Phu	Alex Romero
Jerry Tucker	Dr. Jian Zhang

# FY 2025 Financial Partner Agency Summary

Agency Name: **Community Leadership Academy**

## Agency Description

At Our Community Leadership Academy, we believe in the transformative power of culinary education. Through our comprehensive culinary training program, we are dedicated to equipping individuals with the skills and knowledge needed to excel in the dynamic and rewarding culinary industry. Our program goes beyond teaching cooking techniques; it encompasses food safety, nutrition, menu planning, and culinary creativity. By providing hands-on training from experienced chefs and offering certification opportunities, we empower participants to pursue their passion for culinary arts and embark on a fulfilling career path.

## Agency Established

2019

## Agency Funding Request

\$250,000

## Population Served

Our organization is dedicated to supporting and empowering a diverse community, focusing on three key groups:

1. Recently immigrated individuals to the city, fostering their integration and providing resources for a smooth transition.
2. Individuals recently released from prison, offering reintegration services to promote a successful and positive return to society.
3. Those actively seeking a career change, providing guidance, training, and resources to facilitate a seamless transition into new and fulfilling career paths.

By addressing the unique needs of these populations, our programs aim to promote inclusivity, enhance community engagement, and contribute to the overall well-being and success of these individuals.

## Council Priority Area(s)



Workforce & Business  
Development

## Describe the activities that will be supported through requested city funding

The program covers various cooking techniques, food safety, nutrition, menu planning, and culinary creativity and participants receive hands-on training from experienced chefs. Our academy offers a series of certified cooking classes designed to cater to individuals of all skill levels, from beginners to advanced cooks. These classes cover a wide range of cuisines and cooking styles, providing participants with the opportunity to develop their culinary skills in a supportive and interactive environment.

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Safe Communities	To increase the number of classes from 2 times a year to 4 times a year. To hire an additional instructor.	Pre-surveys will be given to participants before program start and post surveys given at the conclusion.  Increase in enrollment by 50%.	100% of participants graduating from the program. 100% job placement.

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Equip each student with the skill and knowledge needed to excel in the culinary field.	Each student passes exams with at least a 90% score.	*90% of participants have 100% attendance *90% active participation level Each student obtains their certification in culinary arts.

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 57,600	\$ 57,600	\$ 172,800	\$ -	0.0%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ -	\$ -	\$ -	\$ -	0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 57,600</b>	<b>\$ 57,600</b>	<b>\$ 172,800</b>	<b>\$ 250,000</b>	<b>144.7%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 3,360	\$ 3,360	\$ 3,360	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 1,200	\$ 1,200	\$ 1,200	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ -	\$ -	\$ -	\$ -	0.0%
Office Supplies	\$ 1,200	\$ 1,200	\$ 1,500	\$ -	0.0%
Travel & Training	\$ 1,200	\$ 1,200	\$ 1,200	\$ -	0.0%
Groceries	\$ 22,000	\$ 25,000	\$ 25,000	\$ -	0.0%
Insurance	\$ 1,200	\$ 1,200	\$ 1,200	\$ -	0.0%
Technology	\$ 120	\$ 120	\$ 120	\$ -	0.0%
Repair, Maintenance , Janitorial	\$ 2,200	\$ 2,200	\$ 2,200	\$ -	0.0%
Accounting and Legal	\$ 500	\$ 500	\$ 500	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 32,980</b>	<b>\$ 35,980</b>	<b>\$ 36,280</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Total Expenditures</b>	<b>\$ 90,580</b>	<b>\$ 93,580</b>	<b>\$ 209,080</b>	<b>\$ 250,000</b>	<b>119.6%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ -	\$ -	\$ -
Donor Contributions	\$ 68,000	\$ 70,000	\$ 70,000
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 53,000	\$ 64,000	\$ 64,000
<b>Total Revenues</b>	<b>\$ 121,000</b>	<b>\$ 134,000</b>	<b>\$ 134,000</b>

## Current Board of Directors

Robel Moma	Eshetu Wakijera
Seloma Amare	Heather Miller
Nicole Johnson	Dylan Tucker
Joshua Abraham	Greg Wardlaw
Michelle Molnar	

# FY 2025 Financial Partner Agency Summary

Agency Name: **Envision Charlotte**

## Agency Description

Envision Charlotte, established in 2011 as a non-profit by Duke Energy, the City of Charlotte, and Charlotte Center City Partners, is at the forefront of guiding Charlotte's transformative journey toward a circular economy. Our mission encompasses education, innovation, and collaboration to advance sustainability practices in the city.

Over the past 13 years, Envision Charlotte has spearheaded numerous successful projects, marking significant achievements such as our pioneering efforts in energy reduction. In a landmark initiative, we led 61 out of the 64 largest commercial buildings in uptown Charlotte over a 5-year period, collectively reducing their energy use by an impressive 19.2%. This resulted in substantial savings of over \$26 million.

Beyond energy reduction, we expanded our impact into water, air, and waste, laying the foundation for a comprehensive sustainability approach centered around the circular economy. In 2018, in collaboration with the City of Charlotte, we engaged Metabolic, a global leader in the circular economy, to conduct a study of Charlotte's waste stream. The insights gathered guided the strategic plan for transitioning Charlotte towards circular practices.

One notable outcome of this initiative was the establishment of the Innovation Barn. This center serves as a hub for advancing strategies in plastics, organics, textiles, and construction materials. At the Innovation Barn, we seize opportunities to divert materials from landfills, fostering innovation and job creation. Currently, the Innovation Barn hosts 11 tenants, all actively engaged in circular economy practices, both as part of their business models and collectively as a community.

Envision Charlotte's commitment to sustainability and circular practices has earned us recognition on national and international stages. Recently, NewsWeek identified us as one of five cities worldwide leading the way in sustainability. As we continue to innovate and collaborate, Envision Charlotte remains dedicated to driving positive change and establishing Charlotte as a global model for circular economies.

## Agency Established

2011

## Agency Funding Request

\$200,000

## Population Served

Envision Charlotte extends its services to the entire Mecklenburg region and beyond, making our initiatives accessible to the public at large. Our commitment to inclusivity is evident through the hundreds of tours we conduct annually, welcoming diverse participants interested in sustainability and innovation.

Our educational outreach is extensive, encompassing field trips from both public and private schools. We collaborate with many of Charlotte's major employers to educate their employees on sustainable practices and offer valuable volunteer opportunities.

In our pursuit of building impactful business models, our strategic focus is on empowering minority entrepreneurs. We strive to create job opportunities specifically in areas of Charlotte where the need for economic development is most pronounced. By directing our efforts toward these objectives, we aim to foster inclusivity, economic growth, and community empowerment throughout our service area.

## Council Priority Area(s)



Well-Managed  
Government



Workforce & Business  
Development

### Describe the activities that will be supported through requested city funding

We are seeking funding to catalyze the development of business models that actively contribute to the circular economy, fostering innovation, job creation, and workforce development. In Charlotte, there exist promising opportunities to divert more materials from landfills, simultaneously unlocking new business prospects.

Presently, the cost of shipping glass for recycling exceeds its market value, resulting in a negative environmental impact. To address this, we're formulating a plan to establish small hubs in Charlotte. These hubs will efficiently manage local glass waste from businesses and residents, not only reducing transportation costs but also creating employment opportunities within the community.

In the realm of plastics, we've established a Plastics Lab dedicated to repurposing Charlotte's plastic waste into valuable products such as park benches, building blocks for sheds or tiny homes, and bike lane delineators. Our goal is to conceptualize a business model that manufactures these products locally, offering sustainable alternatives to items currently sourced from elsewhere.

These initiatives represent just a glimpse of the potential opportunities for businesses to thrive while simultaneously tackling waste challenges and fostering job growth. Your support will play a pivotal role in bringing these innovative circular economy solutions to fruition.

### FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Accelerate new business models, expand revenue streams, and create jobs through the lens of the circular economy	1) Count of business plans implemented 2) Waste diversion by tonnage, 3) A Full-time/Part-time employees hired/or partnered with	1) Implement 2 business drafted business plans 2) Increase City's recycling rate of target materials by 10% 3) Create 15 jobs
Well-managed Government	Increase stakeholder engagement to advance Charlotte's transition to a circular economy	Targeting k-12 and local companies	Target 5,000 middles schoolers, 5,000 company employees

### FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Create and implement business models that target historically disadvantaged neighborhoods for employment	Focusing on Corridors of Opportunities and other underserved neighborhoods.	Creating 6-10 jobs with the opportunity for job advancement.
Well-managed Government	Partnering with existing minority and women-owned businesses to create additional opportunities within the circular economy	Focusing on landfill diversion via new business models.	Divert 4,000 tons of material from the landfill.

## Overall Agency Budget

	Expenditures FY 2023- FY 2025				Percent city request of overall budget
	FY 2023	FY 2024	FY 2025	FY 2025	
	ACTUAL	BUDGET	PROJECTED BUDGET	CITY REQUEST	
<b>Personnel</b>					
Salaries	\$276,083	\$310,000	\$ 405,000	\$ 85,000	21.0%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ -	\$ -	\$ -	\$ -	0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$276,083</b>	<b>\$310,000</b>	<b>\$ 405,000</b>	<b>\$ 85,000</b>	<b>21.0%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 53,720	\$110,000	\$ 100,000	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 24,270	\$ 20,000	\$ 30,000	\$ 5,000	16.7%
Facilities (e.g. rent, utilities)	\$ 26,426	\$ 35,300	\$ 45,000	\$ 15,000	33.3%
Office Supplies	\$ 8,355	\$ 14,200	\$ 20,000	\$ -	0.0%
Travel & Training	\$ 2,370	\$ 20,000	\$ 20,000	\$ -	0.0%
Technology	\$ -	\$ -	\$ -	\$ -	0.0%
Programs	\$240,333	\$368,500	\$ 365,000	\$ 95,000	26.0%
<b>Subtotal Operating Expenses</b>	<b>\$355,474</b>	<b>\$568,000</b>	<b>\$ 580,000</b>	<b>\$ 115,000</b>	<b>19.8%</b>
<b>Total Expenditures</b>	<b>\$631,557</b>	<b>\$878,000</b>	<b>\$ 985,000</b>	<b>\$ 200,000</b>	<b>20.3%</b>

	Revenues		
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ 300,000	\$ -
Mecklenburg County Funding	\$ 75,000	\$ 75,000	\$ 75,000
Foundation Grants & Funding	\$350,000	\$ 150,000	\$ 250,000
Donor Contributions	\$ 12,525	\$ 25,000	\$ 50,000
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$439,482	\$ 335,000	\$ 620,000
<b>Total Revenues</b>	<b>\$877,007</b>	<b>\$ 885,000</b>	<b>\$ 995,000</b>

## Current Board of Directors

Darlene Heater  
 Adrienne Chillemi  
 Rebecca Freeland  
 LaTazja Henry  
 Ken Chrisman  
 Kim Marks  
 Emmett Weindruch  
 Katherine Neebe  
 John Culbertson  
 Brent Cagle  
 Genevieve Piche  
 David Callaway  
 Dr. Philip E. Otienoburu

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## FY 2025 Financial Partner Agency Summary

### Agency Name: **Freedom Fighting Missionaries**

#### **Agency Description**

The mission of Freedom Fighting Missionaries, Inc. (FFM) is to empower and support individuals who have been formerly incarcerated in their journey towards reentry and successful community integration. FFM aims to break down the barriers that formerly incarcerated individuals face by providing them with access to vital resources and opportunities.

FFM's mission is centered around four key pillars: identification, healthcare, employment, and affordable housing. They recognize the importance of these areas in helping individuals rebuild their lives and create a stable foundation for their future.

Through their programs and initiatives, FFM strives to assist individuals in obtaining proper identification, which is often a significant hurdle for those with a justice involvement. They also prioritize healthcare access, recognizing the importance of physical and mental well-being in the reentry process.

FFM is dedicated to providing employment opportunities and job training to individuals, recognizing that stable employment is critical to successful reintegration into society. They work to connect individuals with employers who are open to hiring individuals with a justice involvement.

Lastly, FFM is committed to addressing the housing challenges faced by formerly incarcerated individuals. They are currently in the process of building a 24-unit apartment building specifically designed for individuals with barriers to housing due to their past justice involvement.

Overall, FFM's mission is to empower individuals with a justice involvement and provide them with the tools and support necessary to rebuild their lives, achieve self-sufficiency, and become productive members of their communities.

#### **Agency Established**

2020

#### **Agency Funding Request**

\$100,000

#### **Population Served**

Freedom Fighting Missionaries, Inc. (FFM) is a 501c3 reentry non-profit organization that serves individuals who are returning to the community after incarceration in Charlotte, NC. FFM primarily focuses on supporting individuals who have been formerly incarcerated and are seeking to reintegrate into society. The direct population that FFM serves includes individuals who have completed their prison sentences and are in the process of transitioning back into the community. This population may include men and women of various ages, ethnicities, and backgrounds who have been involved in the criminal justice system.

FFM provides services to individuals regardless of their offense history, as their primary goal is to support successful reentry and community integration. They understand that each person's journey is unique and tailor their services to meet the specific needs of the individuals they serve.

The organization recognizes that reentry can be a challenging and complex process, and they aim to assist individuals in overcoming barriers and accessing the resources necessary for a successful transition. FFM's services are designed to address various aspects of reentry, including identification, healthcare, employment, and affordable housing, with the ultimate aim of promoting stability, self-sufficiency, and a positive future for those they serve.

Overall, FFM is committed to providing support, guidance, and opportunities for individuals in Charlotte, NC who are reentering society after incarceration, helping them rebuild their lives and become active, productive members of their communities.

FFM focuses on four key pillars to support individuals in their reentry and successful community integration after incarceration. These pillars are:

1. Identification: FFM helps individuals obtain identification documents such as driver's licenses, social security cards, and birth certificates. Having proper identification is crucial for accessing services, finding employment, and reintegrating into society.
2. Healthcare: FFM provides access to healthcare services, including physical and mental health care. They connect individuals with healthcare providers, assist in obtaining health insurance, and offer support in managing any health-related needs during the reentry process.
3. Employment: FFM assists individuals in finding employment opportunities by providing job readiness training, resume building, interview preparation, and job placement assistance. They also collaborate with local businesses and organizations to create employment opportunities for those who have been incarcerated.
4. Affordable Housing: FFM helps individuals secure safe and affordable housing options upon their release. They work with housing agencies, landlords, and community partners to provide housing resources, support in navigating the housing market, and assistance in securing stable housing.

### Council Priority Area(s)



Workforce & Business  
Development

### Describe the activities that will be supported through requested city funding

Employment readiness, interviewing skills training, workplace etiquette and attire training. Participants enter employment placements with our list of second chance employers at a rate no less than \$15.00 per hour. Education and industry specific training will also be provided for participants

### FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Secure workforce development anchor, stakeholder endorsements and career focused efforts to provide upward mobility.	Research and classify all stakeholders utilizing a procedure chart to regulate how, where and when you must communicate with them.	Increase workforce development anchors by 50%.
Workforce & Business Development	Develop a functional tracking system to ensure timely progress and adherence to the designated process and format for plan implementation.	Participation in employment readiness, interviewing skills training, workplace etiquette and attire training.	Increase automated workflow by 25%.
Workforce & Business Development	Build a work method with realistic timelines.	Employment placements with our list of second chance employers like Atrium Health, Lowe's Home Improvement, Spectrum, and the CRVA at a rate starting at \$36k a year.	Increase career readiness and employment by 30%.
Workforce & Business Development	Build programs that motivate development and provide techniques for learning new expertise and abilities, mainly around professional growth.	Determining the effectiveness of professional development by assessing if participants have achieved their employment goals stated in their Freedom Transition Plan (FTP).	Increase soft skills training by 35%.

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Executive Coaching	<p>Deeper understanding of individual contributions and approaches to collaborative tasks.</p> <p>Focused and intentional time to connect, align, and collaborate as a team.</p> <p>Tools to achieve coherence across the organization’s processes and systems.</p>	Onboarding implementation, Managing transient team members, and Interview Coaching.
Workforce & Business Development	Strategic Planning	FFM Leaders, Innovative & Strategic Visioning, Determine Our Goals, Goals, Abandonment, & Implementation, and Team Implementation.	Ensure continuity & agreement in the planning process, Complete vision & casting exercises, Sustain the work & create a vibrant work culture.
Workforce & Business Development	Public Relations, Marketing, and Advertisement	Expand organizational awareness.	Increase donor support, increase community partnerships, increase search engine optimization.
Workforce & Business Development	Create Professional Organizational Structures, and Board of Directors financial oversight training.	Increase Board of Directors engagement and create financial oversight committee within Board of Directors.	Provide more Board oversight, engagement, and fundraising efforts.

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# FY 2025 Financial Partner Agency Summary

Agency Name: **Housing Collaborative**

## **Agency Description**

### *Organizational Overview*

Housing Collaborative (formerly Socialserve) is a nonprofit that makes affordable housing easier to navigate. Founded in Charlotte in 1999, Housing Collaborative helps secure or retain housing for households experiencing homelessness; those who have lost housing due to disaster, displacement, or eviction; and those who are at risk of homelessness. We work in collaboration with other mission-based organizations by leveraging their supportive services and/or programmatic resources with our housing expertise and housing related resources. We are committed to second chances, and to using our journeys to help others. Many of our dedicated team members have experienced barriers to housing and employment like justice system involvement, homelessness or domestic violence.

### *Housing Placement Program History and Growth*

Housing Collaborative's housing placement program model, initially called HousingCLT, was launched in 2017 to recruit and manage relationships with housing providers willing to offer rental units to households who are experiencing homelessness or housing insecurity. The homeless services agencies and emergency shelter providers that refer these households continue to provide stabilizing supportive services, while Housing Collaborative staff determines the referred households' housing needs and barriers; works to identify property providers willing to accept them as tenants; assists in removing the financial barriers to housing placement such as eviction debt and application fees; provides landlord incentive payments; and in some cases, administers ongoing rental subsidy payments.

Housing Collaborative had one staff member and worked with 18 housing providers from 2017 until April 2020, when the pandemic brought urgency to establishing a more collaborative response to housing insecurity. Since April 2020, we have helped over 1000 households secure housing in Mecklenburg County, and we now have 18 locally-focused housing placement, housing retention, and housing recruitment staff that work with over 300 housing providers.

Currently, the following local agencies refer clients to Housing Collaborative for housing placement assistance: Salvation Army, Roof Above, Community Link, Florence Crittenton Services, Safe Alliance, Charlotte Family Housing, Ada Jenkins Center, Freedom Fighting Missionaries, Families Forward Charlotte\*, Freedom Communities\*, and Hearts for the Invisible\*. (\*New in FY24.) RunningWorks had also been a partner before their dissolution in August 2023.

## **Agency Established**

1999

## **Agency Funding Request**

\$300,000

## **Population Served**

We assist households that are experiencing or at-risk of homelessness. Most have very or extremely low incomes and are trying to overcome barriers to housing such as use of a rental subsidy, past involvement with the justice system, and/or previous housing instability including evictions.

## Council Priority Area(s)



Great  
Neighborhoods

### Describe the activities that will be supported through requested city funding

We offer the following services to expedite access to housing in Charlotte, all of which would be supported through the requested city funding:

- Housing Navigation/Placement – hands on housing search and placement assistance for households with or without subsidies, most of whom have very or extremely low incomes and are trying to overcome housing barriers.
- Relocation Services - housing placement assistance specifically for people who are being displaced from housing due to hotel or property sales, or mass property damage like the flooding that occurred at Magnolia Senior Apartments. To date, Housing Collaborative has helped over 120 households displaced from the Sterling community, Econo Lodge, JT Williams Apartments, Economy/Budget Inn, and Magnolia Apartments to secure permanent housing, and we have just begun assisting guests of Speedway Inn to find permanent housing.
- Housing Provider Recruitment and Retention – we recruit and manage relationships with housing providers willing to offer rental units to households who are experiencing homelessness or housing insecurity. When funding allows, we offer incentives and reimbursements for damages or lost rent. We are not seeking City support for the incentives or damage reimbursement costs, but rather for the expenses incurred by Housing Collaborative to administer the service.
- Housing-Related Financial Assistance – when funds are available, Housing Collaborative helps households overcome financial barriers to housing such as application fees, security deposits, or moving costs. Our priority is to make payments as fast as possible to secure housing units. We are not seeking City support for the financial assistance costs, but rather for the expenses incurred by Housing Collaborative to administer the service.
- Rental Subsidy Administration – we currently administer monthly rental subsidy payments to property providers for households experiencing or at risk of homelessness, using federal and local funds. This includes our work to fill and administer subsidies for units set-aside via the City- and County-funded Naturally Occurring Affordable Housing (NOAH) program at 5 different properties throughout Charlotte. We are not seeking City support for the rental subsidy costs, but rather for the expenses incurred by Housing Collaborative to administer the service.

### FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Increase access to existing housing for households with low incomes, including those with rental subsidies.	Number of households we assisted to obtain a lease.	350 households placed into housing per year
Great Neighborhoods	Increase the number of housing providers willing to accept people with rental subsidies.	Number of housing providers signing leases with Housing Collab-referred households for the first time.	60 new housing providers per year
Great Neighborhoods	Support housing retention.	Percentage of households placed by Housing Collab that renew leases annually.	At least 70% of households placed by Housing Collab achieve lease renewal.
Great Neighborhoods	Expedite the housing placement process.	Average total days from date households are referred, to their lease start (housing placement) date.	Reduce the average total days from referral to lease start by 10%.

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Board and agency leadership diversity	% of Housing Collab Board members and agency leadership that represent BIPOC persons, people with lived experience, and/or the LGBTQ community	At least 70% of Board members and at least 75% of agency leadership team members will be BIPOC persons and/or represent the LGBTQ community and/or be persons with lived experience.
Great Neighborhoods	Ensure services are provided to the community members who are most severely impacted by housing barriers.	% of households led by BIPOC and/or LGBTQ persons who benefit from our services	At least 75% of clients assisted with housing services will be households led by BIPOC and/or LGBTQ persons.
Great Neighborhoods	Increase access to areas of opportunity	Percentage of households placed in moderate to high opportunity areas.	At least 10% of households will be placed in moderate to high opportunity areas.
Great Neighborhoods	Increase access to housing for people with justice system involvement	Percentage of households placed in housing that have been involved with the justice system.	At least 40% of households assisted with housing placement will have (self-reported) past or current justice system involvement.

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 1,798,822	\$ 1,911,716	\$ 2,026,080	\$ 206,052	10.2%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits (includes employer health insurance contribution & employer contribution of 3% to employee 401ks)	\$ 342,633	\$ 364,136	\$ 385,920	\$ 39,248	10.2%
<b>Subtotal Personnel Expenses</b>	<b>\$ 2,141,455</b>	<b>\$ 2,275,852</b>	<b>\$ 2,412,000</b>	<b>\$ 245,300</b>	<b>10.2%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 22,019	\$ 7,200	\$ 14,400	\$ 1,464	10.2%
Communications (e.g. publishing, marketing)	\$ -	\$ 21,600	\$ 66,000	\$ 6,712	10.2%
Facilities (e.g. rent, utilities)	\$ 147,696	\$ 156,810	\$ 111,450	\$ 11,334	10.2%
Office Supplies	\$ 29,869	\$ 18,650	\$ 23,420	\$ 2,382	10.2%
Travel & Training (mostly mileage to properties/clients)	\$ 43,610	\$ 5,400	\$ 36,360	\$ 3,698	10.2%
Technology (includes VoiP, internet, Salesforce licenses)	\$ 108,490	\$ 79,933	\$ 81,251	\$ 8,263	10.2%
Professional Services (audits, outsourced HR and Financial Shared Services, creation of Salesforce platform in FY23)	\$ 259,992	\$ 168,850	\$ 183,442	\$ 18,656	10.2%
Business Insurance (Prof Liab, WC, Auto, Exec, Gen Liab)	\$ 13,373	\$ 11,885	\$ 14,985	\$ 1,524	10.2%
Dues, Memberships, Licenses, Permits	\$ 1,378	\$ 1,772	\$ 6,548	\$ 667	10.2%
Cost of Revenue	\$ 17,246	\$ -	\$ -	\$ -	0.0%
Depreciation	\$ 51,580	\$ -	\$ -	\$ -	0.0%
Financial Assistance for Clients (Pass-Through Funds)	\$ 33,887,167	\$ 4,554,000	\$ 3,168,197	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 34,582,420</b>	<b>\$ 5,026,100</b>	<b>\$ 3,706,053</b>	<b>\$ 54,700</b>	<b>1.5%</b>
<b>Total Expenditures</b>	<b>\$ 36,723,875</b>	<b>\$ 7,301,952</b>	<b>\$ 6,118,053</b>	<b>\$ 300,000</b>	<b>4.9%</b>

Revenues			
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ 3,962,464	\$ 5,430,688	\$ 3,100,400
Mecklenburg County Funding	\$ 190,114	\$ 684,460	\$ 684,030
Foundation Grants & Funding	\$ 659,642	\$ 333,800	\$ 346,000
Donor Contributions	\$ 3,021	\$ 2,400	\$ 3,000
Innovative Housing Funds for financial assistance to clients (City of Charlotte)	\$ 17,688	\$ 27,312	\$ -
NOAH Rental Subsidy Program (City 39% County 61%)	\$ 95,229	\$ 247,000	\$ 336,000
Emergency Rental Assistance Program (Treasury via City and County)	\$30,360,269	\$ 434,115	\$ 351,000
Inspection Coordination (fee-for-service)	\$ 88,600	\$ 150,000	\$ 190,080
Other Revenue (ERA Admin fees)	\$ 1,363,242	\$ -	\$ -
A Home for All (via United Way)	\$ -	\$ -	\$ 833,333
City of Charlotte Financial Partner Support	\$ -	\$ -	\$ 300,000
<b>Total Revenues</b>	<b>\$36,740,269</b>	<b>\$ 7,309,775</b>	<b>\$ 6,143,843</b>

### Current Board of Directors

Erin Barbee	Bill Bolstad
Ivan Diaz-Campos	Alassane Diouf
Miriam Espaillet	Mark Ethridge
Kim Graham	LaShonda Hart
LeKisha Jones	Courtney Lundquist
Tashika McKnight	Christina Metheney
Jay Potter	Kenn Shrader

# FY 2025 Financial Partner Agency Summary

Agency Name: **Roof Above**

## Agency Description

Roof Above provides a continuum of homeless services and housing programs for people experiencing homelessness. Homeless services are offered at our Day Services Center and 3 year-round emergency shelters. Our Day Services Center operates daily to meet basic needs including showers, laundry, mail services, and meals. Our 253-bed Tryon St. shelter, 164-bed Howard Levine shelter, and 118-bed Lucille Giles Center overnight shelter operate at capacity and offer more than 500 emergency shelter beds for men. During the winter, we also operate a community-based winter shelter program called Room in the Inn, which provides an average of 60 beds each night from Dec. 1 through Mar. 31.

Our housing programs were developed to create and preserve a variety of housing options. Permanent supportive housing is offered at 3 sites - Moore Place (120 units), SECU The Rise on Clanton (88 units), and HillRock Estates (75 units) - as well as at sites scattered throughout Charlotte (275 units). We also operate Mecklenburg County's newest PSH program for seniors, Forest Pointe Place, which will provide 90+ units once renovations are complete. These programs provide individuals who have experienced chronic homelessness with permanent housing and onsite supportive services. Through HillRock Estates, we have also preserved 266 units of naturally occurring affordable housing for those at 60-80% AMI. Our short-term housing programs include rapid rehousing (40 units), MeckHome for 47 working men, and Link Housing for 40 people awaiting subsidized housing. Our SABER program, based out of Centre Terrace apartments, pairs transitional housing with substance use treatment, enrolling 64 new program participants annually and housing up to 94 individuals at a time. Apart from SABER and the affordable housing units at HillRock Estates, our housing programs use a Housing First approach with low barriers to accessing housing with supportive services.

## Agency Established

1993

## Agency Funding Request

\$268,085

## Population Served

Roof Above's homeless services and housing programs serve 1,300 people daily and 5,000 people annually. Our agency is focused on serving individuals experiencing homelessness in Mecklenburg County. Mecklenburg County's most recent One Number indicates 3,162 people were experiencing homelessness on May 31, 2023. Of those counted, 68% are individuals, the largest population we serve. In addition, while 33% of the population in Mecklenburg County identifies as African-American, 75% of those experiencing homelessness identify as African-American, making homelessness one of the most racially disproportionate social issues in our community. Those we serve have self-identified the following demographics: Gender: 88% male, 11% female (1% data not collected); Race: 76% Black, 19% White, 3% Multiple Races, 1% Asian, 1% American Indian or Alaskan Native; Ethnicity: 4% Hispanic, 96% non-Hispanic

## Council Priority Area(s)



## Describe the activities that will be supported through requested city funding

We are applying for City funding to support the operations of Roof Above’s Day Services Center and specifically the daily operations of Basic Services and the weekday operations of our Resource Center. While the Day Services Center is open to all, we focus on serving our neighbors who are currently sleeping unsheltered.

Services supported through the requested city funding will include:

- Lunch: Served daily from 11:15 am-12:15 pm. An average of 250 people are served daily.
- Showers: Access to showers is offered Monday-Saturday. On average, 40 people shower every day.
- Laundry: Access to laundry services offered Monday-Saturday. On average, 19 people a day can complete a load of laundry for free.
- Mail services: More than 1,500 use our address for their mailing address. Typically receive 200-500 pieces of mail are received and sorted Monday-Saturday. People can check their mail 7 days/week.
- Telephone access: People can sign up to use a phone Monday through Friday. In addition, we maintain a message board where people can receive phone messages, available every day.
- Basic item distribution: Seven days per week, we offer access to personal hygiene items, warm weather items, reading glasses, ponchos, over-the-counter medication, socks, and other basic need items.
- Support obtaining identification documents: Available Monday-Friday, we support our neighbors in accessing their photo ID, birth certificate, and social security card, so that they can access employment, housing, and government services.
- Housing Navigation: Two housing navigators are onsite at the Day Services Center to work with people who are unsheltered towards housing solutions and access to income.
- Resource/Referral: Available Monday-Friday, staff and volunteers are available to support people in a housing crisis navigate our service system through information and referral.
- Community Partners: Access to community partners, including weekly available to Department of Social Services liaison to connect with financial resources and food stamps, twice a month visits from the Health Department for STD testing and education, and monthly virtual clinics with the VA (Veterans Affairs) to connect with veteran services.

## If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?

Roof Above is requesting funding through the City’s Financial Partner application for the first time. Since 1994, we have operated the Day Services Center, originally begun as Urban Ministry Center, to serve our neighbors who are unsheltered. We have operated through private fundraising for thirty years. As we struggle with increasing costs, we are seeking a financial partnership with the City to continue to offer this vital public good to our community.

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Ensure people in a housing crisis have access to meet basic human needs	Number of emergency shelter beds offered daily on average; Number of days Day Services Center open to our residents who are unsheltered; Number of people served through three campuses of homeless services	515 emergency shelter beds; 365 days; 4,000 unique individuals
Great Neighborhoods	Connect people in a housing crisis to a housing solution	Number of people moved from homelessness to housing	450 people
Great Neighborhoods	Reduce the amount of time people experience homelessness	Length of time to housing placement	180 days or less
Great Neighborhoods	Provide supportive housing solutions to individuals who have experienced chronic homelessness	Number of people housed through supportive housing programs; Retention rate in supportive housing programs	600 people provided supportive housing; 85% of tenants retain housing a year or longer
Great Neighborhoods	Preserve NOAH (Naturally-Occurring Affordable Housing) units to reduce housing insecurity	Number of NOAH units preserved	264 units

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Provide Implicit Bias and LGBTQIA+ competency trainings for all staff	Percent of staff that completes at least one training	70%
Great Neighborhoods	Provide learning opportunities and events for staff. Examples include visiting the Harvey Gantt Museum, Indigenous Peoples lunch and learn, and Pride Parade celebration.	Percent of staff that participate in at least one learning opportunity or event	70%
Great Neighborhoods	Roof Above's DEI committee will complete a review of the employee handbook and agency-wide policies to provide recommendations on creating more inclusive and culturally competent policies.	Completed by DEI committee and shared with the Board	By June 30, 2025
Great Neighborhoods	Review primary project outcomes disaggregated by racial demographics	Completed by leadership team and shared with the Board	By June 30, 2025

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries & Benefits	\$ 11,144,204	\$ 12,872,256	\$ 13,258,424	\$ 268,085	2.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 11,144,204</b>	<b>\$ 12,872,256</b>	<b>\$ 13,258,424</b>	<b>\$ 268,085</b>	<b>2.0%</b>
<b>Operating</b>					
Professional Services	\$ 1,305,428	\$ 735,236	\$ 771,998	\$ -	0.0%
Insurance Expenses	\$ 305,094	\$ 290,949	\$ 305,496	\$ -	
Staff & Volunteer Support	\$ 72,140	\$ 118,535	\$ 124,462	\$ -	0.0%
Utilities	\$ 460,211	\$ 536,228	\$ 563,039	\$ -	0.0%
Facilities	\$ 1,264,448	\$ 965,600	\$ 1,013,880	\$ -	0.0%
Housing Services	\$ 2,902,702	\$ 3,370,114	\$ 3,538,620	\$ -	0.0%
Equipment & Supplies	\$ 908,884	\$ 641,484	\$ 673,558	\$ -	0.0%
Communication Systems	\$ 127,492	\$ 116,140	\$ 121,947	\$ -	0.0%
Communications	\$ 22,326	\$ 29,700	\$ 31,185	\$ -	0.0%
Client Services	\$ 206,732	\$ 254,812	\$ 267,553	\$ -	0.0%
Travel & Vehicle	\$ 245,746	\$ 236,055	\$ 247,858	\$ -	0.0%
Fundraising	\$ 160,079	\$ 187,740	\$ 197,127	\$ -	0.0%
Miscellaneous	\$ 112,774	\$ 50,500	\$ 53,025	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 8,094,056</b>	<b>\$ 7,533,093</b>	<b>\$ 7,909,748</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Total Expenditures</b>	<b>\$ 19,238,260</b>	<b>\$ 20,405,349</b>	<b>\$ 21,168,171</b>	<b>\$ 268,085</b>	<b>1.3%</b>

Revenues			
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Contributions	\$ 8,619,839	\$ 8,762,500	\$ 9,134,207
Other Revenue	\$ 2,308,730	\$ 1,174,900	\$ 1,210,147
Program Contracts	\$ 5,965,892	\$ 7,468,046	\$ 7,736,131
Rent Subsidies	\$ 1,389,697	\$ 2,109,088	\$ 2,172,361
Tenant Revenue	\$ 954,102	\$ 890,813	\$ 915,325
<b>Total Revenues</b>	<b>\$19,238,260</b>	<b>\$ 20,405,347</b>	<b>\$ 21,168,171</b>

\*Program Contracts includes City Council Financial Partners Request

**If requesting funding for a specific program within your agency, please provide description of the specified program**

We are seeking support for our Unsheltered Services program within our Roof Above continuum of services. Our Unsheltered Services program is focused on providing basic services and housing navigation to our neighbors who are sleeping outside, or other places unfit for human habitation, such as vehicles or abandoned homes. Our Unsheltered Services is made up of three primary programs.

Our Day Services Center includes both Basic Services and the Resource Center (services are outlined above). Our Day Services Center is open 365 days per year and is located right outside of Uptown Charlotte.

Our Street Outreach Team is a team of seven that provides street outreach Monday through Saturday, from 8 am-9 pm. Team members on this team are mobile and often focus their efforts on people who may be resistant to engaging at our Day Services Center or with other providers. Outreach members are focused on building rapport and working with people to connect with resources with a particular focus on connecting people to housing solutions. This outreach team is funded through QuikTrip and is focused on serving individuals encountered on QT store properties and in their surrounding neighborhoods.

During winter months, Unsheltered Services also operates a community-based winter shelter called Room in the Inn, which partners with 50+ host sites, mostly congregations, to offer a warm place to spend the night and two meals (dinner and breakfast). Last year, Room in the Inn served 663 unique individuals, providing on average 60 emergency shelter beds nightly. Room in the Inn most often serves people who would otherwise be unsheltered.

## Overall Program Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 827,419	\$ 1,125,526	\$ 1,159,292	\$ 268,085	23.1%
Benefits	\$ 185,653	\$ 237,129	\$ 244,243	\$ -	0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 1,013,072</b>	<b>\$ 1,362,655</b>	<b>\$ 1,403,535</b>	<b>\$ 268,085</b>	<b>19.1%</b>
<b>Operating</b>					
Professional Services	\$ 37,983	\$ 55,620	\$ 58,401	\$ -	0.0%
Staff & Volunteer Support	\$ 6,750	\$ 5,700	\$ 5,985	\$ -	0.0%
Utilities	\$ 37,300	\$ 37,500	\$ 39,375	\$ -	0.0%
Facilities	\$ 77,750	\$ 77,097	\$ 80,952	\$ -	0.0%
Housing Services	\$ 40,300	\$ 95,450	\$ 100,223	\$ -	0.0%
Equipment & Supplies	\$ 61,540	\$ 55,540	\$ 58,317	\$ -	0.0%
Client Services	\$ 41,072	\$ 33,322	\$ 34,988	\$ -	0.0%
Travel & Vehicle	\$ 10,453	\$ 22,980	\$ 24,129	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 313,148</b>	<b>\$ 383,209</b>	<b>\$ 402,370</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Total Expenditures</b>	<b>\$ 1,326,220</b>	<b>\$ 1,745,864</b>	<b>\$ 1,805,905</b>	<b>\$ 268,085</b>	<b>14.8%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ -
City Funding	\$ -	\$ -	\$ 268,085
Foundation Grants & Funding	\$ 43,000	\$ 729,710	\$ 758,106
Donor Contributions directed toward DSC operations	\$ 11,454	\$ 5,766	\$ 5,939
Donor Contributions toward agency general operating	\$ 1,160,890	\$ 864,429	\$ 622,795
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 110,876	\$ 145,959	\$ 150,979
<b>Total Revenues</b>	<b>\$ 1,326,220</b>	<b>\$ 1,745,864</b>	<b>\$ 1,805,904</b>

### Current Board of Directors

Joy Patterson	Elena Airapetian
Caroline Yingling	Paula Bird
David Goldberg	Curtis Bodison
Brent Torstrick	Gary Chesson
Ron Clark	Gray Dyer
Deems May	Mark Ethridge
Ellen Mark	Randy Franklin
Brent Martin	Rosie Kmeta
Stacey McCray	Greg Lewis
Matt Miller	Harry Redd
Ashley Rogers	Chinette Stevenson
Glenn Stewart	

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# FY 2025 Financial Partner Agency Summary

Agency Name: **Stiletto Boss University**

## Agency Description

Stiletto Boss University (SBU) is a dynamic youth training program for high-school girls, founded by social entrepreneur Jania Massey in 2015. Rooted in entrepreneurship, our mission is to teach the power of collaboration, sisterhood, and community impact. SBU aims to connect young women to opportunities, build social capital, and mold the next generation of community leaders. Our goal is to empower young women to create social enterprises that generate income while giving back to the community.

SBU is committed to molding young ladies with confidence in public speaking, basic business skills, and owning their gifts. Our top priority is teaching what it takes to create a successful business, providing future opportunities and promoting sustainability and unity within the community.

### *Program Structure - 3 Phases:*

- Entrepreneur Education: Curriculum covering finance, marketing, networking, and more.
- Entrepreneur Application: Participants apply practices learned by creating marketing plans or building budgets.
- Entrepreneur Execution: Participants execute business skills, showcasing products in a community business or Stiletto Challenge (pitch competition).

### *PROGRAM FORMATS:*

- In School Chapters: SBU partners with local schools, offering programs during or after school hours. Chapters, led by SBU Ambassadors, cover entrepreneurship basics. Students are eligible to pitch at the annual youth pitch challenge. We have served over 10 schools since we started in 2016.
- Community Based Partnerships: Similar to in-school partnerships, SBU works in local community settings with SBU Chapter Ambassadors. Programs are funded by grants, and students can pitch at the annual youth pitch challenge. We have served over 5 schools since we started in 2016.
- SBU Headquarters (HQ) Program: A fee-based program providing a deeper dive into business and social impact. Led by SBU HQ Managers, meeting bi-weekly in the evenings. Participants have access to business mentors, exclusive SBU HQ curriculum, and can pitch at the annual youth pitch challenge.
- SBU Premium: A monthly subscription for self-paced training, covering entrepreneurial topics. Includes video/audio expert sessions, digital workbooks, challenges, and a private forum. Cost: \$10 per month or \$15 with a virtual ambassador.
- Bosscamp: A 6-week hybrid summer camp teaching entrepreneurship and community impact. Campers engage with expert instructors, plan community impact projects, and execute based on community needs.

This multifaceted approach allows us to reach and empower a diverse group of young women. With a variety of programs, SBU is making a lasting impact on our community and beyond.

## Agency Established

2017

## Agency Funding Request

\$77,500

## Population Served

Stiletto Boss University (SBU) directly serves middle and high school girls, typically ranging from ages 11 to 18. This diverse and dynamic population includes young women from various socioeconomic backgrounds, ethnicities, and communities. SBU is committed to inclusivity, ensuring that its programs are accessible to girls with different experiences and aspirations.

The direct population served by SBU encompasses students who may be attending local schools partnering with SBU for in-school programs, as well as those participating in community-based programs within specific neighborhoods. Additionally, girls engaged in SBU Headquarters (HQ) programs, SBU Premium, and Bosscamp contribute to the direct population served by receiving specialized training and mentorship.

SBU's inclusive approach is designed to empower girls with the skills and confidence needed to explore entrepreneurship, build social capital, and contribute positively to their communities. By reaching out to this specific age group, SBU aims to nurture a new generation of leaders who are socially conscious, collaborative, and equipped to make a meaningful impact on their surroundings.

## **Council Priority Area(s)**



Workforce & Business  
Development

### **Describe the activities that will be supported through requested city funding**

The funding received by Stiletto Boss University (SBU) will support a range of activities aimed at empowering and educating young girls through innovative and impactful programs. The funding will contribute to the sustainability and expansion of existing initiatives, allowing SBU to reach a broader audience and make a more profound impact on the community. The supported activities include:

1. Expansion of In School Chapters: Funding will support the establishment of new In School Chapters in collaboration with local educational institutions, providing more girls with access to SBU's entrepreneurship curriculum and mentorship. 25% of budget
2. Community-Based Partnerships: The funds will facilitate the continuation and growth of community-based programs, enabling SBU to reach girls in local neighborhoods and community centers. This includes providing resources for program materials, mentorship, and pitch competition events. 15% of budget
3. SBU Headquarters (HQ) Program Enhancement: Funding will be allocated to enhance the SBU HQ program, offering a deeper and more comprehensive business and social impact curriculum. This includes providing participants with access to business mentors, organizing networking events, and covering program-related expenses. 20% budget
4. SBU Premium Subscription Program: The supported activities will include the expansion and improvement of the SBU Premium subscription program. Funding will contribute to the creation of new content, expert sessions, digital workbooks, and the development of a vibrant online community for members. 10%
5. Bosscamp Summer Camp: The funds will be utilized to strengthen and expand the Bosscamp summer camp. This includes securing expert instructors, organizing community impact projects, and ensuring that participants have access to necessary resources and materials. 10% of budget
6. Diversity and Inclusion Initiatives: SBU will allocate funding to implement targeted initiatives aimed at enhancing diversity and inclusion within the program. This may involve scholarships or financial assistance for participants, cultural sensitivity training for facilitators, and outreach strategies to underrepresented communities. 5% of budget
7. Program Evaluation and Improvement: A portion of the funding will be dedicated to program evaluation, enabling SBU to measure the effectiveness of its initiatives and make data-driven improvements. This includes assessing participant outcomes, collecting feedback, and refining program content based on evaluation results. 5% of budget
8. Outreach and Community Engagement: Funding will support outreach efforts to engage more schools, community organizations, and partners. This includes marketing materials, information sessions, and collaborative events to raise awareness about SBU and encourage participation. 5% of budget

In summary, the funding received by Stiletto Boss University will be instrumental in expanding and enhancing its diverse range of programs, ensuring that more young girls have the opportunity to develop entrepreneurial skills,

foster sisterhood, and make positive contributions to their communities.

### FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Enhance Entrepreneurial Knowledge and Skills	Assess participants' understanding of entrepreneurship principles through pre and post-program quizzes and evaluations.	Achieve a minimum 20% improvement in participants' knowledge and skills related to business planning, marketing, finance, and networking.
Workforce & Business Development	Increase Confidence in Public Speaking	Evaluate participants' public speaking abilities through before-and-after assessments during pitch competitions and presentations.	Attain a 25% increase in participants' confidence and effectiveness in public speaking.
Workforce & Business Development	Foster Collaboration and Sisterhood	Conduct participant surveys and observations to assess the development of collaborative skills and sisterhood bonds.	Achieve a minimum 30% increase in participants reporting positive experiences of collaboration and sisterhood within the program.
Workforce & Business Development	Promote Community Impact Projects	Track the planning and execution of community impact projects initiated by participants.	Facilitate a minimum of 80% of program participants engaging in community impact projects by the end of the program cycle.
Workforce & Business Development	Encourage Business Idea Execution	Monitor the progress of participants in executing their business ideas, including product development and marketing.	Support at least 50% of participants in successfully executing their business ideas within the timeframe of the program.

### FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Foster Inclusive Participation	Track the demographic composition of program participants, specifically focusing on ethnic diversity, socioeconomic status, and geographic representation.	Achieve a 15% increase in the enrollment of girls from underrepresented communities over the course of the program.
Workforce & Business Development	Eliminate Barriers to Access	Conduct accessibility assessments and gather feedback to identify and address potential barriers to program participation.	Implement strategies to eliminate identified barriers, resulting in a 10% increase in accessibility for girls facing challenges in participating.
Workforce & Business Development	Ensure Financial Accessibility	Evaluate the financial accessibility of fee-based programs, such as SBU HQ, and track the utilization of scholarships or financial assistance.	Provide financial support to at least 20% of participants in fee-based programs, ensuring that financial constraints do not hinder their participation.
Workforce & Business Development	Amplify Representation in Leadership Roles	Assess the diversity within leadership roles, including program ambassadors, mentors, and guest speakers.	Achieve a 20% increase in the representation of individuals from underrepresented backgrounds in leadership positions within the program.
Workforce & Business Development	Facilitate Inclusive Learning Environments	Conduct participant surveys and focus group discussions to assess perceptions of inclusivity within	Attain a minimum 25% increase in participant feedback indicating that the

Strategic Priority	Objective	Measures	Target
		program sessions.	program provides an inclusive and supportive learning environment.
Workforce & Business Development	Strengthen Community Partnerships	Evaluate the diversity of community partners and assess the inclusivity of locations for program delivery.	Establish partnerships with at least two additional community organizations serving underrepresented populations, enhancing outreach and inclusivity.
Workforce & Business Development	Monitor and Address Disparities	Regularly analyze participant data to identify any disparities in program outcomes based on demographics.	Implement targeted interventions to address identified disparities and strive for equitable program outcomes for all participants.

## Overall Agency Budget

Expenditures FY 2023- FY 2025						
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget	
<b>Personnel</b>						
Salaries	\$72,500	\$130,000	\$ 150,000	\$ 50,000	33.3%	
Merit	\$ -	\$ -	\$ -	\$ -	0.0%	
Benefits	\$15,669	\$ 19,000	\$ 22,000	\$ 12,700	57.7%	
<b>Subtotal Personnel Expenses</b>	<b>\$88,169</b>	<b>\$149,000</b>	<b>\$ 172,000</b>	<b>\$ 62,700</b>	<b>36.5%</b>	
<b>Operating</b>						
Capital Equipment (e.g. vehicles, computers)	\$ 1,100	\$ 1,500	\$ 1,900	\$ 1,900	100.0%	
Communications (e.g. publishing, marketing)	\$ 3,000	\$ 4,000	\$ 5,000	\$ 5,000	100.0%	
Facilities (e.g. rent, utilities)	\$ 1,900	\$ 2,200	\$ 2,500	\$ 2,500	100.0%	
Office Supplies	\$ 1,500	\$ 1,700	\$ 2,000	\$ 2,000	100.0%	
Travel & Training	\$ 700	\$ 1,000	\$ 1,200	\$ 1,200	100.0%	
Technology	\$ 1,500	\$ 2,000	\$ 2,200	\$ 2,200	100.0%	
<b>Subtotal Operating Expenses</b>	<b>\$ 9,700</b>	<b>\$ 12,400</b>	<b>\$ 14,800</b>	<b>\$ 14,800</b>	<b>100.0%</b>	
<b>Total Expenditures</b>	<b>\$97,869</b>	<b>\$161,400</b>	<b>\$ 186,800</b>	<b>\$ 77,500</b>	<b>41.5%</b>	

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ 75,000
Foundation Grants & Funding	\$114,000	\$ 200,000	\$ 200,000
Donor Contributions	\$ 7,000	\$ 15,500	\$ 15,000
Service Fees	\$ 17,300	\$ 20,000	\$ 25,000
Other Revenue	\$ 1,700	\$ 2,500	\$ 5,000
<b>Total Revenues</b>	<b>\$140,000</b>	<b>\$ 238,000</b>	<b>\$ 320,000</b>

## Current Board of Directors

Julie Goff	Kellie Cartwright
Nichole Harris	Krystle Myers
LaSahe Tietsort	Nichole Benjamin
Kris Gentilella	Mary Nicole Douglas
Hannah Beavers	

## FY 2025 Financial Partner Agency Summary

Agency Name: **United Way of Greater Charlotte**

### Agency Description

United Way of Greater Charlotte advances economic mobility and racial equity through place-based and grassroots solutions. United Way awards millions in grants each year to nonprofit agencies through initiatives that build stronger neighborhoods, advance racial equity and economic mobility, and provide a safety net for those who need it most across the Charlotte region.

A Home For All was launched with the release of the Strategic Framework, a comprehensive, transformative strategy developed by the Charlotte-Mecklenburg Housing & Homelessness Strategy (CMHHS). The Strategic Framework includes an overview of four actionable priorities, established from recommendations across nine areas: prevention, shelter, affordable housing, cross-sector supports, policy, funding, data, communications and long-term strategy.

Prevention will build on highly successful existing programs to create a robust prevention system that helps people stay in their homes and avoid experiencing homelessness. To support renters staying in their homes, A Home For All suggests cementing the innovations made in providing emergency rental assistance during the COVID-19 pandemic to help households that, absent intervention, could enter into homelessness. Person-directed care will help to overcome a fragmented system of service provision that makes it difficult for people to connect to critical services. Expanding the supply of affordable housing will make all types of housing—from shelter beds to single-family homes for sale—available to people experiencing homelessness and housing insecurity. Charlotte-Mecklenburg's emergency response ecosystem contains both community based grassroots and larger, institutional nonprofits that provide complementary services that would benefit from greater coordination. United Way of Greater Charlotte is spearheading that task and has orchestrated the framework and responsible for commencement of the Implementation Plan.

### Agency Established

1958

### Agency Funding Request

\$130,000

### Population Served

Consistent with all of United Way of Greater Charlotte' initiatives, A Home For All was developed from extensive research, data analysis, surveys and interviews with hundreds of stakeholders. United Way of Greater Charlotte is unique in its approach as a nonprofit umbrella agency that not only supports and finances agencies but provides technical guidance, trainings, and opportunities for collaboration, capacity building and professional development. Our agency's new approach in supporting place-based, grass-root non-profits and initiatives across Charlotte-Mecklenburg's historically marginalized communities was constructed based off feedback and collaboration with communities and stakeholders to drive systems change. With the City's support, the population that will be served will be those within the continuum of housing and homelessness. Working with the nonprofit sector, and utilizing the work of BIPOC organizations through A Home For All, we will continue the feedback process loop: creating and expanding capacity to better support and drive change in the communities that need it most.

### Council Priority Area(s)



## Describe the activities that will be supported through requested city funding

United Way of Greater Charlotte is requesting \$130,000 to sustain the Contract Manager position which will directly oversee agency efforts for the A Home For All initiative. This funding provides for both salary and fringe benefits. The Contract Manager is responsible for contractual compliance of government funded community initiatives. Responsibilities of the position include: working with community organizations and other city funded initiatives, executing contracts and amendments, monitoring and mitigating financial exposure, improving processes, building sustainable community relationships and representing United Way at all times. The ideal candidate has demonstrated knowledge of full-cycle contracting, an understanding of stakeholder needs, and the ability to merge the two together. In addition, the candidate is a skilled learner who builds excellent external and internal collaborative relationships. This position will be responsible for the following:

- Create sub-recipient contracts in collaboration with Program Director, ensuring contracts include all needed compliance requirements and a well-defined scope of work.
- Create and implement training plan to ensure sub-recipients understand contract requirements and have the most up-to-date information on program compliance.
- Implement monitoring tools and conduct routine monitoring of United Way's and sub-recipients' work (e.g. client files) and operations (e.g. policy and procedures) to verify performance and ensure compliance with applicable Federal, State and local rules, regulations and policies.
- Review sub-recipient client files to affirm client eligibility.
- Collaborate with internal and external partners to ensure contractual requirements are met.
- Support internal team in contract approvals and amendment process.
- Support Director in amending United Way or program policy and procedures as necessary
- Coordinate and prepare complex correspondence; perform research as needed, complete special project as assigned
- May be required to perform administrative duties.
- Represent United Way at community engagement events.
- Other duties as assigned by Director.

In accordance with United Way of Greater Charlotte's Race, Equity, and Inclusion/Diversity, Equity, and Inclusion (REI/DEI) policies, this position will seek continuous training and opportunities to better understand equity and inclusion pieces of our work:

- Constantly learning & actively participating in programs, trainings, and discussions regarding racial inequities, exclusions, oppressions
- Appreciation of and willingness to work with and advocate for people from diverse racial, ethnic, and socioeconomic backgrounds
- Consistently seeks to learn and understand the specific experiences of historically marginalized racial groups in the U.S., particularly Black, Indigenous, and Latin-x groups

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Expand legal representation for eviction prevention	# receiving legal representation; # of eviction avoided/deferred	200 households facing eviction receive legal representation; 60% of households with legal representation avoided/deferred eviction
Great Neighborhoods	Expand upstream rental assistance	# households receiving assistance % households who remain stably housed;	Specific targets dependent on pilot design
Great Neighborhoods	Expand workforce and remove barriers to maximize critical home repair	# vendors providing critical home repair; # months consumers wait to access home repair; # repairs completed annually	Specific targets dependent on pilot design

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Provide consistent care coordination for those experiencing homelessness or housing insecurity	# and % housing unstable families who remain stably housed	Specific targets dependent on pilot design
Great Neighborhoods	Preservation of NOAH	# of NOAH units rehabilitated; # of NOAH units preserved	Specific targets dependent on pilot design

### FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Providing technical assistance to funded agencies	# agencies attending technical trainings	At least 50% of funded agencies attend 1 technical training or 1-on-1 with Evaluation Manager per fiscal year
Safe Communities	REI/DEI New Staff Training, staff-wide monthly REI/DEI trainings and monthly staff newsletter	# new staff trained in REI; # staff attending REI monthly trainings; # readership monthly newsletter	All new staff trained in REI/DEI within first 6 weeks of hire; 75% of staff in-office attend monthly REI trainings; increase engagement/readership of monthly newsletter
	All new hires read and acknowledge UW Employee Handbook policies and procedures regarding rights, equal employment, discrimination, etc.	# acknowledgment forms signed by new hires within first 6 weeks of employment	All new staff read and review UW Employee Handbook
	Professional development opportunities for UW Staff through United Way Worldwide, including leadership programs, training courses, and webinars.	# UW employees reporting enrollment in professional development	At least 20% of UW staff that complete professional development training during the calendar year
	All staff, AHFA Implementation Teams and those with lived experience on grant-making bodies attend Race Matters for Juvenile Justice two-day workshop	# staff, team members and grantees that attend both days of RMJJ workshop	All UW staff completed RMJJ within first 6 months of hire.

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 2,958,278	\$ 3,939,952	\$ 4,058,151	\$ -	0.0%
Merit	\$ -	\$ -	\$ 0	\$ -	0.0%
Benefits	\$ 607,126	\$ 1,229,264	\$ 1,266,142	\$ -	0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 3,565,405</b>	<b>\$ 5,169,216</b>	<b>\$ 5,324,292</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Operating</b>					
Grant Awards	\$14,634,475	\$11,597,384	\$11,945,306	\$ -	0.0%
Program Supplies	\$ 4,000	\$ 10,000	\$ 10,300	\$ -	0.0%
Volunteers	\$ 9,650	\$ 29,250	\$ 30,128	\$ -	0.0%
Capital Equipment (e.g. vehicles, computers)	\$ 40,000	\$ 45,000	\$ 46,350	\$ -	0.0%
Professional Fees	\$ 837,205	\$ 3,170,057	\$ 3,265,159	\$ -	0.0%
Finance Fees	\$ 63,567	\$ 50,000	\$ 51,500	\$ -	0.0%
Liability Insurance	\$ 38,000	\$ 40,000	\$ 41,200	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 13,970	\$ 131,000	\$ 134,930	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 329,129	\$ 336,099	\$ 346,182	\$ -	0.0%
Office Supplies	\$ 10,000	\$ 12,150	\$ 12,515	\$ -	0.0%
Travel & Training	\$ 61,641	\$ 65,547	\$ 67,513	\$ -	0.0%
Technology	\$ 141,496	\$ 174,765	\$ 180,008	\$ -	0.0%
Fundraising	\$ 147,500	\$ 352,330	\$ 362,900	\$ -	0.0%
Other Expense	\$ 650,092	\$ 356,870	\$ 367,576	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$16,980,725</b>	<b>\$16,370,452</b>	<b>\$16,861,566</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Total Expenditures</b>	<b>\$20,546,130</b>	<b>\$21,539,668</b>	<b>\$22,185,858</b>	<b>\$ -</b>	<b>0.0%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 1,640,899	\$ 667,713	\$ 687,744
Mecklenburg County Funding	\$ 4,101,039	\$ 6,408,340	\$ 6,600,590
Foundation Grants & Funding	\$ 3,157,756	\$ 3,241,667	\$ 3,338,917
Donor Contributions	\$ 6,764,055	\$ 7,761,500	\$ 7,994,345
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 4,899,779	\$ 3,281,740	\$ 3,380,192
<b>Total Revenues</b>	<b>\$ 20,563,528</b>	<b>\$ 21,360,960</b>	<b>\$ 22,001,789</b>

### If requesting funding for a specific program within your agency, please provide description of the specified program

United Way of Greater Charlotte has accepted the role of the quarterback organization charged with guiding the implementation of A Home For All, Charlotte-Mecklenburg's strategy to address all aspects of affordable housing and homelessness. Over the last year, United Way, worked with the community to develop the implementation plan that will guide our work for the next four years. The implementation plan focuses on three pillars: (1) people, (2) prevention, and (3) production. Each pillar is made up of initiatives that represents key systematic changes that are required to create a more responsive system of support that will move Charlotte-Mecklenburg towards a

community where "homelessness is rare, brief, and nonrecurring and every person has access to permanent, affordable housing and the resources to sustain it."

The three initiatives under the People Pillar focus on providing consistent case coordination to families and individuals on their journey to housing stability, creating a platform that can track and refer people to programs, and providing funding for wraparound support. The 4 initiatives under the Prevention Pillar focus on critical home repair, eviction court representation, rental assistance, and creating funding to finance the preservation of affordable housing. The 2 initiatives under the Production Pillar focus on expanding the housing trust fund and recruiting more property providers that accept tenants with barriers. Since that time, responding to growing concerns of missing support for the unsheltered, United Way has added a fourth pillar after convening with stakeholders. This pillar is a holistic response for emergency response/the unsheltered.

Under this new pillar, the United Way will be convening stakeholders and build collaboration across communities to (1) expand street outreach, (2) create flexible funding to support mental and physical health, basic needs, and substance abuse treatment (3) establish new low barrier, trauma-informed shelter options, and (4) increase funding for Rapid Rehousing and Permanent Supportive Housing.

In FY24, seven out of the nine initiatives are currently moving forward in various stages of planning, piloting, and scaling. This continues to be a community lead plan with over 100 community members responsible for overseeing the design, pilot, and evaluation of initiatives while also ensuring coordination between the initiatives and partners. In FY25, we will advance 8 of the 9 initiatives contained in the original plan, as well as efforts tied to the new Emergency Response pillar. A Home For All seeks to create systemic change that will reduce housing instability and homelessness across Charlotte-Mecklenburg by aligning investments in affordable housing and service provision. A Home For All will advance through successful braiding of public and private funding. It is, therefore, imperative that United Way sustain it's capacity to manage successfully the contractual requirements associated with public funding.

## Overall Program Budget

	Expenditures FY 2023- FY 2025				Percent city request of overall budget
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	
<b>Personnel</b>					
Salaries	\$ 1,246,105	\$ 2,162,042	\$ 2,226,903	\$ 75,000	3.4%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 240,857	\$ 601,461	\$ 619,505	\$ 17,250	2.8%
<b>Subtotal Personnel Expenses</b>	<b>\$ 1,486,963</b>	<b>\$ 2,763,503</b>	<b>\$ 2,846,408</b>	<b>\$ 92,250</b>	<b>3.2%</b>
<b>Operating</b>					
Grant Awards	\$14,634,475	\$11,597,384	\$ 11,945,306	\$ -	0.0%
Program Supplies	\$ 4,000	\$ 10,000	\$ 10,300	\$ -	0.0%
Volunteers	\$ 4,900	\$ 5,250	\$ 5,408	\$ -	0.0%
Capital Equipment (e.g. vehicles, computers)	\$ 36,000	\$ 40,500	\$ 41,715	\$ -	0.0%
Professional Fees	\$ 418,000	\$ 655,549	\$ 675,215	\$ -	0.0%
Finance Fees	\$ -	\$ 50,000	\$ 51,500	\$ 37,750	73.3%
Liability Insurance	\$ 38,000	\$ 40,000	\$ 41,200	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 1,920	\$ 131,000	\$ 134,930	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 329,129	\$ 335,857	\$ 345,933	\$ -	0.0%
Office Supplies	\$ 8,850	\$ 10,550	\$ 10,867	\$ -	0.0%
Travel & Training	\$ 30,251	\$ 30,200	\$ 31,106	\$ -	0.0%
Technology	\$ 78,108	\$ 103,976	\$ 107,095	\$ -	0.0%
Fundraising	\$ -	\$ -	\$ -	\$ -	0.0%
Other Expense	\$ 145,709	\$ 269,600	\$ 277,688	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$15,729,342</b>	<b>\$13,279,866</b>	<b>\$ 13,678,262</b>	<b>\$ 37,750</b>	<b>0.3%</b>
<b>Total Expenditures</b>	<b>\$17,216,305</b>	<b>\$16,043,369</b>	<b>\$ 16,524,670</b>	<b>\$ 130,000</b>	<b>0.8%</b>

Revenues			
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ 1,640,899	\$ 667,713	\$ 687,744
Mecklenburg County Funding	\$ 4,101,039	\$ 6,408,340	\$ 6,600,590
Foundation Grants & Funding	\$ 3,157,756	\$ 3,241,667	\$ 3,338,917
Donor Contributions	\$ 6,764,055	\$ 7,761,500	\$ 7,994,345
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 4,899,779	\$ 3,281,740	\$ 3,380,192
<b>Total Revenues</b>	<b>\$20,563,528</b>	<b>\$ 21,360,960</b>	<b>\$ 22,001,789</b>

### Current Board of Directors

Avaleen Crawford	Beau Fisher	Bill Currens	Brian Middleton	Cathy Campbell
Dena R. Diorio	Dennis Williams	Dr Rhett Brown	Hank Alston	Heather Tamol
Hendrick Ellis	Joe Wall	John Fagg	Keith Giddens	Lula Jackson
Marcel Solomon	Michele Juliana	Mitch Gibson	Myra Foster	Pamela Wideman
Raj Natarajan	Ron Messenger	Shawn Heath	Sil Ganzo	Todd Pearce
Will Alston	Will Pitts			

# FY 2025 Financial Partner Agency Summary

Agency Name: **WYTV7 Community Broadcast**

## Agency Description

WYTV7's goal is to communicate educational resources for people in need. We provide programs such as mentoring and youth empowerment, health and wellness including exercise and scholarships. Also, we have Financial, Health, Life Coaches, Marriage Counselors and Therapist just to name a few available in our Mobile APP Resource Directory. These Professionals work toward strengthening families and or individuals ' needs. WYTV7 serves as volunteers with other partnering organizations and provides projects within communities. We collaborate with other community leaders and offer learning seminars or workshops whether online or in person. Our purpose is to do good work and give back to the community.

## Agency Established

2018

## Agency Funding Request

\$130,000

## Population Served

The program is designed to help vulnerable populations who are underserved. The goal of the program is to help participants improve their financial literacy and make better financial decisions.

## Council Priority Area(s)



Workforce & Business  
Development

## Describe the activities that will be supported through requested city funding

We seek funding for a 4–6-month financial literacy program, offering virtual and in-person sessions by certified instructors. The curriculum covers budgeting, saving, debt management, and investing. Funding is needed for staff salaries, instructor fees, consulting services, printing and supplies.

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	To initially, recruit 20 youth for the program.	Pre-surveys will be given to participants before program start and post surveys given at the conclusion.	90% of participants graduating from the program with the skills to make wise financial decisions

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Develop a curriculum that reflects the cultural and socioeconomic backgrounds of the underserved population	Collect feedback from participants to continuously improve the effectiveness	90% of participants have 100% attendance 90% active participation level 85% increase of financial literacy knowledge

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 72,500	\$ 130,000	\$ 150,000	\$ 50,000	33.3%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 15,669	\$ 19,000	\$ 22,000	\$ 12,700	57.7%
<b>Subtotal Personnel Expenses</b>	<b>\$ 88,169</b>	<b>\$ 149,000</b>	<b>\$ 172,000</b>	<b>\$ 62,700</b>	<b>36.5%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 1,100	\$ 1,500	\$ 1,900	\$ 1,900	100.0%
Communications (e.g. publishing, marketing)	\$ 3,000	\$ 4,000	\$ 5,000	\$ 5,000	100.0%
Facilities (e.g. rent, utilities)	\$ 1,900	\$ 2,200	\$ 2,500	\$ 2,500	100.0%
Office Supplies	\$ 1,500	\$ 1,700	\$ 2,000	\$ 2,000	100.0%
Travel & Training	\$ 700	\$ 1,000	\$ 1,200	\$ 1,200	100.0%
Technology	\$ 1,500	\$ 2,000	\$ 2,200	\$ 2,200	100.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 9,700</b>	<b>\$ 12,400</b>	<b>\$ 14,800</b>	<b>\$ 14,800</b>	<b>100.0%</b>
<b>Total Expenditures</b>	<b>\$ 97,869</b>	<b>\$ 161,400</b>	<b>\$ 186,800</b>	<b>\$ 77,500</b>	<b>41.5%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ 75,000
Foundation Grants & Funding	\$ 114,000	\$ 200,000	\$ 200,000
Donor Contributions	\$ 7,000	\$ 15,500	\$ 15,000
Service Fees	\$ 17,300	\$ 20,000	\$ 25,000
Other Revenue	\$ 1,700	\$ 2,500	\$ 5,000
<b>Total Revenues</b>	<b>\$ 140,000</b>	<b>\$ 238,000</b>	<b>\$ 320,000</b>

### If requesting funding for a specific program within your agency, please provide description of the specified program

WYTV7 CBN is proposing a financial literacy training program that will be offered both virtual and in person format. The program will be taught by certified trained instructors and will cover topics such as budgeting, saving, debt management, and investing. The program will be offered for 4-6 months, with monthly classes that will allow participants to learn, ask questions and get feedback from the instructors. The program is designed to help vulnerable populations who are underserved. The goal of the program is to help participants improve their financial literacy and make better financial decisions.

## Overall Program Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 72,500	\$ 119,000	\$ 130,000	\$ 52,000	40.0%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 3,000	\$ 3,000	\$ 5,500	\$ 5,500	100.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 75,500</b>	<b>\$ 122,000</b>	<b>\$ 135,500</b>	<b>\$ 57,500</b>	<b>42.4%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 1,000	\$ 750	\$ 2,500	\$ 2,500	100.0%
Communications (e.g. publishing, marketing)	\$ 1,000	\$ 1,000	\$ 3,500	\$ 3,500	100.0%
Facilities (e.g. rent, utilities)	\$ 500	\$ 1,000	\$ 3,500	\$ 3,500	100.0%
Office Supplies	\$ 750	\$ 500	\$ 2,500	\$ 2,500	100.0%
Travel & Training	\$ 500	\$ 500	\$ 2,200	\$ 2,200	100.0%
Technology	\$ 1,000	\$ 1,200	\$ 3,500	\$ 3,500	100.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 4,750</b>	<b>\$ 4,950</b>	<b>\$ 17,700</b>	<b>\$ 17,700</b>	<b>100.0%</b>
<b>Total Expenditures</b>	<b>\$ 80,250</b>	<b>\$ 126,950</b>	<b>\$ 153,200</b>	<b>\$ 75,200</b>	<b>49.1%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ 75,000
Foundation Grants & Funding	\$ 75,000	\$ 90,000	\$ 100,000
Donor Contributions	\$ 7,000	\$ 10,000	\$ 15,000
Service Fees	\$ 18,000	\$ 20,000	\$ 25,000
Other Revenue	\$ 5,000	\$ 10,000	\$ 15,000
<b>Total Revenues</b>	<b>\$105,000</b>	<b>\$ 130,000</b>	<b>\$ 230,000</b>

## Current Board of Directors

Karen Legrant    Libby Grier    Tracy Walton    LaTonya Allen  
 Larry Grier    Denise White

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# DEDICATED REVENUE

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FY 2025 Financial Partner  
Agency Name: **Charlotte Center City Partners**

## **Agency Description**

As an innovative, respected and trusted economic and community development organization, Charlotte Center City Partners leads the evolution of Charlotte Center City to a thriving, beloved place with opportunity for all. We act as a convener on top issues in the urban core, imagine opportunities beyond what exists and develop strategic partnerships in and beyond our city. We also envision and activate strategies and actions that will assure Charlotte Center City is a welcoming and equitable, economically vibrant, culturally rich and beloved place for all. We lead with research and urban planning, economic and community development and neighborhood support, marketing and communications, programming and events, and more.

Charlotte Center City Partners (CCCP) is a 501(c)4 not-for-profit corporation created in 1979 by visionary Charlotte leaders who believed a strong region required a strong center city. Today, CCCP has 501(c)3 related entities: 1) CCCP Community Trust (including Charlotte Joy Rides), 2) the Market at 7th Street. Our combined staff of approximately 33, plus 14 Center City Ambassadors, aspires to create a Center City that serves as the foundation for our thriving region, and that is committed to economic mobility, affordability, and the values of inclusivity and equity.

### **Diversity, Equity and Inclusion**

Charlotte Center City Partners (CCCP) believes in the value of great urban places, acting with integrity, the power of collaboration, a commitment to justice and equity, approaching all we do with passion, innovation, tenacity and excellence. Achieving this requires the intentional integration of diversity, equity, and inclusion in everything we do, both internally and externally.

### **Service Area / MSD**

Our service area encompasses Municipal Service Districts (MSDs) 1- 4. We also conduct targeted economic development work, supporting the leadership of community organizations in the Historic West End. A Municipal Service District is the same as a Business Improvement District (BID) or Business Improvement Area (BIA).

We serve all property owners in the districts, small and large employers and workers, residents and visitors, entertainment, arts and cultural groups, institutions and venues, sports teams and venues and all stakeholders who are engaged in keeping Uptown and South End vibrant and growing.

Our governance Board is the CCCP Board of Directors. But we have many other groups on whom we depend for advice and direction as we serve the stakeholders of Uptown and South End. They include the Neighborhood Associations in the district and in surrounding neighborhoods, the South End Advisory Committee, the Boards of the CCCP Community Trust and Market at 7th Street, and the Uptown Business Group, and more.

### **Charlotte Center City Partners Focus Areas FY24**

#### **Planning and Development**

CCCP facilitates the development of Uptown, South End and Midtown in fulfillment of vision plans through subject matter expertise in urban design, planning, research, development, and project management.

#### **Economic Development**

CCCP actively works to retain, expand, and attract business in the Center City through expertise in the Uptown, South End, and Midtown office markets, marketing and research tools, and collaborating with economic development partners and the real estate development and brokerage community.

#### **Research**

CCCP refines existing and creates new databases, surveys, and research tools to support planning, real estate, and economic development efforts in Uptown and South End.

## Transportation

CCCP creates and implements projects, programs and policies to enable residents, employees and visitors to access and experience Center City with ease. CCCP focuses on improving walkability and bikeability and sharing real-time information about transportation options and available parking.

## Community Development

CCCP collaborates with stakeholders and partners to promote and grow vibrant, urban, welcoming, inclusive, transit-oriented neighborhoods and business districts with a strong sense of community, a variety of housing opportunities, high quality residential amenities, diverse businesses, quality schools, and great public spaces.

## Programs and Placemaking

CCCP also programs the Center City through a multi-faceted approach to the planning, design and management of public spaces. CCCP provides placemaking expertise, capitalizing on the Center assets, inspiration, and potential.

## Events

CCCP develops and cost effectively produces creative and high-quality engaging events on behalf of the City of Charlotte and the Center City to create memorable experiences for our guests, employees, and residents, through subject matter expertise in event production, fundraising and project management. CCCP also supports the city's permitting of 3rd party events.

## Sustainability

CCCP strives to create the most sustainable urban core in the nation through direct support of Envision Charlotte, as well as support for public, non-profit and private sustainability initiatives that move us toward this goal. CCCP also works with its partners to deploy initiatives that use data to inform decision making, modeling Smart City programs that benefit people, planet and profit.

## Marketing and Communications

CCCP increases awareness and understanding of CCCP and Uptown, South End, and Midtown as welcoming and equitable, economically vibrant, culturally rich and beloved place for all. We build awareness of Center City Charlotte as a thriving commercial center, magnet for talent, beloved urban neighborhood, place of inclusivity and memorable destination through effective communications, community engagement, building brand, public relations, and marketing.

## Diversity, Equity & Inclusion

As a mission-based community leadership organization that is committed to the eradication of racism and injustice in the Center City, CCCP must be a champion for racial equity and justice in all its work, while living these values through its internal policies and procedures.

## Operations

CCCP will operate in an efficient and fiscally sound manner, recruit and retain qualified professionals, and provide appropriate technology and tools to enable Board and staff innovation and creativity.

## Agency Established

1978

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$6,796,745	\$7,508,026	\$711,281

## Total years financial partner with City of Charlotte

46 years

## FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
To leverage the resources and influence of CCCP to facilitate and promote the economic and cultural development of the Center City	Retain, expand, and attract business in the Center City	create a potential brick and mortar retailer pipeline with a mentorship training strategy	New Measure	19 participants in HIVE program
Manage Center City Vendor Program and Food Truck Program in a consistent manner	All vendor and food truck slots filled with qualified and varied businesses	All vendor and food truck slots filled with qualified and varied businesses 95% of the time.	New Measure	All vendor slots are filled 100% of the time, although some vendors are still not utilizing their full available hours
Continue to implement the adopted expansion strategy that incorporates e-bikes and focuses on parks and underserved communities.	Hold outreach events and place stations in under-served communities	Hold at least 5 outreach events and place at least 3 stations in under-served communities	16 of 33 stations are in under-served areas	8 new stations will serve under-served communities

### Population Served

Our service area encompasses Municipal Service Districts (MSDs) 1- 4. We also conduct targeted economic development work, supporting the leadership of community organizations in the Historic West End. A Municipal Service District is the same as a Business Improvement District (BID) or Business Improvement Area (BIA).

We serve all property owners in the districts, small and large employers and workers, residents and visitors, entertainment, arts and cultural groups, institutions and venues, sports teams and venues and all stakeholders who are engaged in keeping Uptown and South End vibrant and growing.

Our governance Board is the CCCP Board of Directors. But we have many other groups on whom we depend for advice and direction as we serve the stakeholders of Uptown and South End. They include the numerous neighborhood associations in the district and in surrounding neighborhoods, the South End Advisory Committee, the Boards of the CCCP Community Trust and Market at 7th Street, and the Uptown business Group, just to name a few.

### Council Priority Area(s)



### Describe the activities that will be supported through requested city funding

Scope of Services FY25

**Workforce and Business Development** - Includes programs and initiatives that build and maintain a successful business climate and workforce talent, including increasing the number of jobs with sustainable wages and benefits, increasing economic opportunity for all residents, and encouraging business development, innovation and entrepreneurship.

**Uptown Vibrancy** - Revitalize Charlotte's Central Business District and elevate Uptown's appeal to business, residents, and guests.

Economic Development - Retain, expand, and attract business in the Center City through expertise in the Uptown, South End, and Midtown office markets, marketing and research tools, and collaborating with economic development partners and the real estate development and brokerage community.

Develop Retail Entrepreneurship Pipeline - Using a combination of street vendor program, Market at 7th Street, HIIVE, and Small Business Innovation Fund to create a pipeline of retailers for Center City, with a focus on diversity, equity, and inclusion.

Second Ward High School - Working with CMS and the County, support a planned, innovative Uptown high school.

Market at 7th Street - Support the Market at 7th Street as a mission-based non-profit that incubates new food and retail businesses, supports economic mobility through entrepreneurship, and builds community wellness, as a welcoming commons for all.

Mixed Use Development - Recruit, support and advocate for the successful design and development of mega and significant sites and mixed-use projects in MSD's 1-4. Work with public and private partners to assess impacts of projects that advance elements of the 2040 Center City Vision Plan and work to mitigate elements inconsistent with the Plan.

Vendors - Manage Tryon Street Vendor Program and Food Truck Program in a consistent manner. Continue to explore new products, brand elements and design while implementing the Tryon Street Mall ordinance.

Information - Manage Center City banner, newsrack, and kiosk programs.

Events Permitting - Lead the evaluation of special events for the Center City with City of Charlotte Special Events team. Manage permitting process for all Center City public ROW requests.

Partnerships - Continue to produce/collaborate/support an annual series of programs and events designed to encourage active participation from the community at large and support partner organizations. Continue to use Victoria Yards as a hub for programming and event innovation.

Hospitality Community - Work closely with the Center City hospitality community through regular communication to create community, share vital information, advocacy and marketing.

Charlotte Shout - Produce an aspirational multi-week destination festival designed to showcase our community by celebrating Charlotte's creativity and innovation through art, music, food, and ideas. Located in Uptown Charlotte, SHOUT! features exceptionally curated programming from around the corner and around the world.

Novant Health Thanksgiving Day Parade - Produce annual Thanksgiving Parade as a Super Regional event with a focus on building audience experience (both in person and on television). Through partnership with WCCB, expand regional television broadcast opportunities while building sponsor support with an eye toward establishing Charlotte as the Southeastern US holiday destination.

Vision Awards - Produce the annual stakeholder event as the definitive Center City event to celebrate arts, culture, innovation, vibrancy and economic development.

Digital Marketing and Storytelling - Deploy digital marketing levers including social media, owned media (email, websites, etc.), paid media, and others to tell effective and compelling stories about Center City with the consumer journey/experience at the forefront.

Music Everywhere CLT - Music Everywhere will foster a thriving music scene in Charlotte by supporting an

environment friendly to live music and music creators, encouraging the business of music in Charlotte, developing tomorrow's music talent and celebrating Charlotte's music stories locally and internationally so that Charlotte is renowned for music.

Marketing Research, Insights, and Analytics - Conduct market research and leverage marketing data to generate insights about audiences, messaging, and tactics. Use data-driven insights to inform marketing strategy and tactics.

Build Brand - Use developed brands to create an evergreen program, event, marketing, and communications plan to enhance and support all brands of the Center City, building curiosity and support for people to visit, live, work, and bring their business to Center City Charlotte.

National Media - Partner with CRVA and the Charlotte Regional Business Alliance to support economic development through earned and social media regionally, nationally and intentionally.

Support of Cultural Arts -Leverage and convene the collective strength of Center City stakeholders, vibrant cultural arts organizations, City of Charlotte, ASC, FFTC, the CCCP Board of Directors and others to support the continued health of our Center City cultural arts organizations.

Support Existing and Welcome New Diverse Businesses - To support the vision of a welcoming and inclusive economy, work with partners to support and welcome diverse businesses, including new, diverse-owned and businesses that orient toward diverse customer bases.

Transportation and Planning - Includes programs and initiatives that anticipate and plan for the growth of the community. Addressing growth with strategic investments, building, and maintaining a comprehensive transportation network, and placemaking strategies that encourage connection between neighborhoods and employment centers.

Center City 2040 Vision Plan - Partner with the community, public and private sectors, and non-profit partners to implement plan recommendations and strategies such as building a new 2nd Ward High School, 'reimagining' Tryon and Brevard Streets and Silver line planning process.

Mobility Options - Contribute to the planning for and successful implementation and development of infrastructure such as: Strategic Mobility Plan (SMP), Gateway Station, CTC, Silver Line alignment, South Boulevard and South Tryon 'complete streets', South End Station, and bike lanes. Build support among neighbors, employees, visitors and political leaders to invest in bike facilities.

Charlotte Joy Rides - Work with the City of Charlotte as partners to provide bike share services.

North Tryon Strategy - Implement N. Tryon Vision Plan recommendations including the vision and strategy for a N. Tryon Tech Hub. Advocate for successful redevelopment of 7th and Tryon blocks.

South End - Partner with the Planning Department, City and County, South End Board Committee, and stakeholders to implement South End Vision Plan recommendations. Support Mobility Options priorities. Make it easy to live, work, experience entertainment and do business in South End. Enhance the South End experience through advocacy, programming, creative placemaking and public art.

Rail Trail - Execute innovative Rail Trail placemaking, maintenance, and programming, including "Rail Trail Lights". Stay engaged in the successful completion of the Pedestrian Bridge project.

Parks, Recreation & Placemaking - Initiate and support existing and new efforts such as the murals program, sidewalk shop project, digital kiosks, and streetscape enhancement projects.

McColl Park - Work with the City, public and private partners to redesign/reimagine and construct McColl Park as a beloved gathering place to honor Hugh McColl.

Safe Communities - Includes programs and initiatives that ensure neighborhoods are safe, healthy, and inclusive, with a focus on violence prevention, fire protection and community relations.

Uptown Public Safety - Define and address the real and perceived Uptown public safety challenges by creating and sharing a collective vision for Uptown public safety.

CCPSC - Convene and help lead the Center City Public Safety Council. Encourage attendance from Uptown and South End safety personnel and stakeholders and provide program support.

Aggressive Panhandling - Work with Center City Ambassadors, CMPD and the CCPSC to implement the Real Change campaign to deter and eventually eliminate aggressive panhandling. Facilitate connecting panhandlers in crisis to services.

Center City Ambassador Program - Coordinate a comprehensive program that provides a high degree of hospitality to visitors and locals in Center City, supports a safe environment, and connects individuals in crisis with services.

Great Neighborhoods - Includes programs and initiatives that focus on comprehensive initiatives designed to create affordable housing and provide opportunities that align with creating great neighborhoods.

Homelessness and Affordable Housing - Advocate for and support the continuing evolution of the Home for All Housing and Homelessness Implementation Plan, led by the United Way and Mecklenburg County. Partner with homelessness providers, Center City Ambassadors, CMPD and Mecklenburg County to ensure homelessness is rare, brief and non-recurring and every person has access to permanent, affordable housing and the resources to sustain it.

Community Development - Advocate, communicate, convene, partner with stakeholders to seize opportunities and navigate challenges, and program and promote happenings to drive vibrancy, connectivity, equity, and inclusiveness in Center City.

Neighborhood Events - Support 6-8 programs with microgrants. Support occasional large events, in order to brand places, drive economic activity and build community.

Physical Improvements, Placemaking & Beautification - Facilitate, implement and maintain improvements to the public realm including landscaping, public art, street banners, street furniture, gateway improvements and signage.

Residential Amenities - Facilitate the development and/or expansion of residential amenities (parks, recreation, daycare, schools, and activities/events).

Schools - Advocate on behalf of Center City neighborhoods to support quality schools as a residential amenity for families in Uptown and South End.

Stakeholder Communications - Maintain current databases for stakeholder communications. Use all channels to communicate regularly with stakeholders about a variety of items of interest.

Well Managed Government, focused on Equity, Engagement, and the Environment - includes programs and initiatives that ensure the city demonstrates inclusivity through commitment to and focus on equity and safeguarding the environment; leadership in financial stewardship; reviewing best practices; and maintaining consistency in approach with an emphasis on effective and efficient services that are accountable, customer focused, and inclusive.

Environmental Sustainability - Continue to invest in, support and partner with Envision Charlotte for Center City initiatives such as sustainable, zero-waste events. Continue to pursue Smart City initiatives that enable Center City to use technology to drive efficiency in ways that benefit the environment, save money and improve social outcomes. Partner with Sustain Charlotte for Center City initiatives, as well.

Diversity, Equity & Inclusion - Continue to be a champion for racial equity and justice in all its work, while living the values of DE&I through internal policies and procedures.

Operational Excellence - CCCP will operate in an efficient and fiscally sound manner, recruit and retain qualified professionals, and provide appropriate technology and tools to enable Board and staff innovation and creativity. We will use the funds to support Uptown and South End vibrancy, economic and community development and services for our stakeholders.

**If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?**

The mission of our organization continues to be to create a vital Center City that serves as the foundation for a strong regional economy. As an innovative, respected and trusted economic and community development organization, we strive to lead the evolution of Charlotte Center City to a thriving, beloved place with opportunity for all.

This year, we have a laser focus, with partners, on public safety and vibrancy for Uptown and South End as well as a shared vision for vacancy and vintage building stock in Uptown.

We will continue to deploy our team’s strengths in innovation, economic development, research, logistics, communications, events, community engagement, and more.

Our guiding principles for the FY25 budget continue to be to serve our Center City constituents of major employers, property owners, residents, retailers and hospitality businesses through: (1) a focus on public safety and a welcoming Center City for all by partnering with CMPD and our Center City Public Safety Committee, and expanding the reach of our Ambassador corps, providing services in hospitality, public safety and being “first responders”, providing more tools to connect people in crisis with services; 2) using innovation and partnerships to address vintage office, vacancy and reimagining of office products in Uptown; 3) economic and retail development efforts to recruit businesses, headquarters, retailers and jobs to the urban core; (4) strategic focus on innovation through the North Tryon Tech Hub, the Iron District and the Pearl; (5) supporting and incubating small businesses through the Small Business Innovation Fund, the HIIVE and the Market at 7th Street; (6) strategic initiatives through the 2040 Center City Vision Plan, N. Tryon Vision Plan, Historic South End Strategic Plan, 2025 Charlotte Mecklenburg Homelessness Strategy: a Joint Effort to End and Prevent Housing Instability and Homelessness and the Rail Trail Vision Plans; (7) strategic support of South End businesses and development; (8) integration of residential properties and amenities coming online in Uptown and South End to create complete neighborhoods; (9) strategic focus on diverse and inclusive programming and events through micro-grants as well as events and programming we produce and support; and (10) new initiatives to enliven the public realm through live music and murals

**FY2025 Performance Measures and Targets**

Strategic Priority	Objective	Measures	Target
Safe Communities	Includes programs and initiatives that build and maintain a successful business climate and workforce talent, including increasing the number of jobs with sustainable	Uptown Vibrancy - Revitalize Charlotte's Central Business District and elevate Uptown's appeal to business, residents, and guests.	Achieve this through activation, public and private infrastructure investments, driving the economy forward,

Strategic Priority	Objective	Measures	Target
	<p>wages and benefits, increasing economic opportunity for all residents, and encouraging business development, innovation and entrepreneurship.</p>	<p>Economic Development - Retain, expand, and attract business in the Center City through expertise in the Uptown, South End, and Midtown office markets, marketing and research tools, and collaborating with economic development partners and the real estate development and brokerage community.</p> <p>Develop Retail and Small Business Entrepreneurship Pipeline - Using a combination of street vendor program, Market at 7th Street, HIIVE, and Small Business Innovation Fund to create a pipeline of retailers for Center City, with a focus on diversity, equity, and inclusion.</p> <p>Second Ward High School - Working with CMS and the County, support a planned, innovative Uptown high school.</p> <p>Market at 7th Street - Support the Market at 7th Street as a mission-based non-profit that incubates new food and retail businesses, supports economic mobility through entrepreneurship, and builds community wellness, as a welcoming commons for all.</p> <p>Mixed Use Development - Recruit, support and advocate for the successful design and development of mega and significant sites and mixed-use projects in MSD's 1-4. Work with public and private partners to assess impacts of projects that advance elements of the 2040 Center City Vision Plan and work to mitigate elements inconsistent with the Plan.</p> <p>Vendors - Manage Center City Vendor Program and Food Truck Program in a consistent manner. Continue to explore new</p>	<p>engagement of Uptown stakeholders (residents, small businesses, employees and employers), a marketing and communications campaign (placed and earned media) and ensure an inviting environment (Quality of Life balance). Build upon the Business Retention and Expansion program for Center City's existing company portfolio, with an inclusive growth focus to add value to Charlotte's regional economic development ecosystem for expansion, retention, and recruitment assists. Identify and build on three sectors for outreach in FY25. Host ED meeting with partners once a month. Partner with CCCP's vendor program, pop-ups at the Market at 7th Street and Market at 7th Street managers to create a potential brick and mortar retailer pipeline. Support the HIIVE mentorship and training strategy and SBIF in FY25 with an inclusive growth focus to attract new retailers, with an initiative to create a healthier mix of national/local businesses at one of the publicly owned properties. Advocate for and work with 2nd Ward High School Association and CMS for the Second Ward High School Plan. Market at 7th Street continues to implement a plan for culinary and retail incubation, education, mentorship, entrepreneurship with a commitment to diversity, equity and inclusion. Maintains a diverse mix of business owners to remain at 90% capacity and</p>

Strategic Priority	Objective	Measures	Target
		<p>products, brand elements and design while revisiting the Tryon Street Mall ordinance.</p> <p>Information - Manage Center City banner, newsracks, and kiosk programs.</p> <p>Events Permitting - Lead the evaluation of special events for the Center City with City of Charlotte Special Events team. Manage permitting process for all Center City public ROW requests.</p> <p>Partnerships - Continue to produce/collaborate/support an annual series of programs and events designed to encourage active participation from the community at large and support partner organizations. Continue to use Victoria Yards as a hub for programming and event innovation.</p> <p>Hospitality Community - Work closely with the Center City hospitality community through regular communication to create community, share vital information, advocacy and marketing.</p> <p>Charlotte Shout - Produce an aspirational multi-week destination festival designed to showcase our community by celebrating Charlotte's creativity and innovation through art, music, food, and ideas. Located in Uptown Charlotte, SHOUT! features exceptionally curated programming from around the corner and around the world.</p> <p>Novant Health Thanksgiving Day Parade - Produce annual Thanksgiving Parade as a Super Regional event with a focus on building audience experience (both in person and on television). Through partnership with WCCB, expand regional</p>	<p>operates within financial projections. 3-4 fundraising opportunities per year. Provide at least 3 education opportunities for business owners per year. 1 positive media story per month. Convene potential development partners for mixed-use tracts. Engage with projects to advance 2040 elements. Gauge disruption and recovery. Advocate as needed. All vendor and food truck slots filled with qualified and varied businesses 95% of the time. Seek out and maintain robust list of unique businesses and offerings. Partner with City to implement the Tryon Street Mall ordinance. All pole banner, newsrack and kiosks slots filled with colorful and well-designed content 95% of the time. All mall use requests addressed within 2 business days/hours of receipt. Respond to all permits within 24-48 hours Successful production of partner events. Resolve any reported problems with City/County staff. Produce or collaborate on at least 10 successful events at Victoria Yards in FY25. Communicate with hospitality leadership and community through email and virtual forums as needed. Partner with CRVA, HTA and CAHA to share vital information. 2 positive news stories about hospitality per quarter. One major marketing initiative with partners in FY25. Produce, with excellence, a multi-week festival, including national and international headliners and supporting local arts</p>

Strategic Priority	Objective	Measures	Target
		<p>television broadcast opportunities while building sponsor support with an eye toward establishing Charlotte as the Southeastern US holiday destination.</p> <p>Vision Awards - Produce the annual stakeholder event as the definitive Center City event to celebrate arts, culture, innovation, vibrancy and economic development.</p> <p>Digital Marketing and Storytelling - Deploy digital marketing levers including social media, owned media (email, websites, etc.), paid media, and others to tell effective and compelling stories about Center City with the consumer journey/experience at the forefront.</p> <p>Music Everywhere CLT - Music Everywhere will foster a thriving music scene in Charlotte by supporting an environment friendly to live music and music creators, encouraging the business of music in Charlotte, developing tomorrow's music talent and celebrating Charlotte's music stories locally and internationally so that Charlotte is renowned for music.</p> <p>Marketing Research, Insights, and Analytics - Conduct market research and leverage marketing data to generate insights about audiences, messaging, and tactics. Use data-driven insights to inform marketing strategy and tactics.</p> <p>Build Brand - Use developed brands to create an evergreen program, event, marketing, and communications plan to enhance and support all brands of the Center City, building curiosity and support for people</p>	<p>groups. Raise sponsorship dollars to produce the multifaceted festival. Build on the successes and lessons learned from three years of evening parades for audience experiences for both in-person and TV viewers. Increase in quality, not quantity of parade units. Explore expansion of parade into at least one additional TV market. 2 additional sponsors. Vision Awards is produced with a positive budget and groundbreaking art/culture included in show. Messaging creates shared vision of the unique position of the Center City in Charlotte. Traffic to websites increases 10%. Relevant content on specific marketing and social media channels changes frequently to tell compelling stories that engage audiences. Increase social media engagement by 10%. Build strength of Instagram reels and engagement by 10%. Produce a Music Everywhere conference and festival annually. Live music at every event produced by CCCP. Continue to assess need to Explore a Music Everywhere ED. Conduct 2-3 market research studies. Translate results into actionable data to create insights into audiences, messaging and tactics. Place at least 3 positive stories each month in media. Create an annual plan with brand integration in banners, website, social and earned media and approved collateral. Create an annual plan for advertising and earned media to support brand campaign targets and</p>

Strategic Priority	Objective	Measures	Target
		<p>to visit, live, work, and bring their business to Center City Charlotte.</p> <p>National Media - Partner with CRVA and the Charlotte Regional Business Alliance to support economic development through earned and social media regionally, nationally and intentionally.</p> <p>Support of Cultural Arts &amp; Leverage and convene the collective strength of Center City stakeholders, vibrant cultural arts organizations, City of Charlotte, ASC, FFTC, the CCCP Board of Directors and others to support the continued health of our Center City cultural arts organizations.</p> <p>Welcome and Support New and Diverse Businesses - To support the vision of a welcoming and inclusive economy, work with partners to support and welcome diverse businesses, including new, diverse-owned and businesses that orient toward diverse customer bases.</p>	<p>messages. Provide collateral and tour support to CRVA. With partners, support the revived National Media Initiative. Place at least 1 proactive story in regional or national media at least once a month. Execute and measure digital tactics as outlined in the plan. Increase the economic development understanding of Center City and the Charlotte region among national and international audiences based on survey results. Partner with FFTC and ASC to convene and support arts groups, advocates and funders to establish strategic plans for the near-mid and long-term funding and viability of arts groups in the Center City and all of Mecklenburg County. Utilize the Community Development teams, City, County, Alliance and CRVA to continue to provide a welcome package for every new business in the Center City. Create a survey to assess needs of new businesses and create connections and mentors especially for diverse, minority owned, service-oriented businesses. Develop and support Small Business Owner networks in Uptown and South End, with regular meetings and communication channels. Support SBIF Rounds 5 &amp; 6.</p>
Safe Communities	Includes programs and initiatives that anticipate and plan for the growth of the community. Addressing growth with strategic investments, building, and maintaining a comprehensive transportation network, and placemaking strategies that encourage connection between neighborhoods and employment	Center City 2040 Vision Plan - Partner with the community, public and private sectors, and non-profit partners to implement plan recommendations and strategies such as building a new 2nd Ward High School, 'reimagining' Tryon and Brevard Streets and Silver line planning	Act as project manager as the plan continues implementation. Provide milestone progress reports as required. Manage scope of each phase of the project. Support all actions to accelerate and fund transit construction. Serve on task forces for 2030

Strategic Priority	Objective	Measures	Target
	centers.	<p>process.</p> <p>Mobility Options - Contribute to the planning for and successful implementation and development of infrastructure such as: Strategic Mobility Plan (SMP), Gateway Station, CTC, Silver Line alignment, South Boulevard and South Tryon 'complete streets', South End Station, and bike lanes. Build support among neighbors, employees, visitors and political leaders to invest in bike facilities.</p> <p>Charlotte Joy Rides - Work with the City of Charlotte as partners to provide bike share services.</p> <p>North Tryon Strategy - Implement N. Tryon Vision Plan recommendations including the vision and strategy for a N. Tryon Tech Hub. Advocate for successful redevelopment of 7th and Tryon blocks.</p> <p>North Tryon Tech Hub - Lead the vision, strategy and implementation for a N. Tryon Tech Hub.</p> <p>South End Vision Plan - Partner with the Planning Department, City and County, South End Board Committee, and stakeholders to implement South End Vision Plan recommendations. Support Mobility Options priorities. Make it easy to live, work, experience entertainment and do business in South End. Enhance the South End experience through advocacy, programming, creative placemaking and public art.</p> <p>Rail Trail - Execute innovative Rail Trail placemaking, maintenance, and programming, including "Rail Trail Lights". Stay engaged in the successful</p>	<p>Transportation Plan funding and communications. Work with CATS on planning for the potential renovation of the CTC, planning for the Silver Line through Uptown and Gateway Station. Participate on working groups around South Boulevard and South Tryon "complete streets" I-277 reconfiguration, etc. Partner with CDOT to expand cycletracks, bike lanes and marketing campaigns as possible to encourage cycling. Partner with CDOT to support continued strategic transformation of Charlotte Joy Rides through FY25. Remove Joy Rides docks from private and city property during the first 3 months of 2025. Codevelop and own a shared communications plan. Lead the planning for a North Tryon Tech Hub. Advocate for a redevelopment plan for Hal Marshall site and open spaces. Support successful redevelopment of the 7th and Tryon blocks. Lead the planning for a North Tryon Tech Hub. Convene the North Tryon Tech Hub Advisory Committee. Implement at least one of the recommendations for the Tech Hub Strategy in FY25. 2 nodes designed and created with wayfinding signs installed. Wayfinding system designed by 4th Q FY25. Support the design and execution of 2 new murals and 2 new public art installations. Plan and implement the Rail Trail Lights Festival. Execution of at least 10 successful programming events on the Rail Trail through FY25.</p>

Strategic Priority	Objective	Measures	Target
		<p>completion of the Pedestrian Bridge project.</p> <p>Parks, Recreation &amp; Placemaking - Initiate and support existing and new efforts such as the murals program, sidewalk shop project, digital kiosks, and streetscape enhancement projects.</p> <p>McColl Park - Work with the City, public and private partners to redesign/reimagine and construct McColl Park as a beloved gathering place to honor Hugh McColl.</p>	<p>Stay connected with the City project team project team for the Pedestrian Bridge project. Produce at least one event in a Center City park or park area. Activate at least 2 nodes along the Rail Trail and at least one public art installation including murals. Work with the McColl Park LLC to manage the design and construction of McColl Park with a target opening of June 2025.</p>
Great Neighborhoods	Includes programs and initiatives that ensure neighborhoods are safe, healthy, and inclusive, with a focus on violence prevention, fire protection and community relations.	Uptown Public Safety - Define and address the real and perceived Uptown public safety challenges by creating and sharing a collective vision for Uptown public safety.	<p>Form multi-organizational cross collaborative effort, supporting Charlotte’s Central Business District revitalization and elevate Uptown’s appeal to businesses and people. Support and partner with the CELC, CMPD, the Center City Public Safety Council, residents, building owners and managers and the Center City Ambassadors. Create the agenda for each bi-monthly meeting. Host Hybrid meetings. Attendance improved by 5%. Share Real Change campaign, distribute collateral and solicit support from stakeholders. Provide tools to the Center City Ambassadors as “first responders” and extensions of outreach teams. Reduction in panhandling by 15%. 15% of panhandlers engaged agree to seek services as more businesses return to office. Manage the Ambassador program, with excellence, for Uptown and South End, in partnership with third party operator, Block By Block. Evaluate performance based on data and stakeholder input. Increase hospitality contacts by 10%.</p>

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Includes programs and initiatives that focus on comprehensive initiatives designed to create affordable housing and provide opportunities that align with creating great neighborhoods.	<p>Homelessness and Affordable Housing - Advocate for and support the continuing evolution of the CMHHS Housing and Homelessness Plan now led by the United Way and Mecklenburg County as they create and activate an implementation Plan.</p> <p>Community Development - Advocate, communicate, convene, partner with stakeholders to seize opportunities and navigate challenges, and program and promote happenings to drive vibrancy, connectivity, equity, and inclusiveness in Center City.</p> <p>Neighborhood Events - Support 6-8 programs with microgrants. Support occasional large events, in order to brand places, drive economic activity and build community.</p> <p>Physical Improvements, Placemaking &amp; Beautification - Facilitate, implement and maintain improvements to the public realm including landscaping, public art, street banners, street furniture, gateway improvements and signage.</p> <p>Residential Amenities - Facilitate the development and expansion of residential amenities (parks, recreation, daycare, schools, and activities/events).</p> <p>Schools - Advocate on behalf of Center City neighborhoods to support quality schools as a residential amenity for families in Uptown and South End. Work with CMS and other partners to begin planning for a new high school in Uptown.</p> <p>Stakeholder Communications - Maintain current databases for</p>	<p>Support the implementation plan creation of A Way Home with the United Way and Mecklenburg County to coordinate a more inclusive strategy to end and prevent homelessness. Execute the plan strategy and tactics with support from all partners. COO serves on the Technical Committee. Strategize goals and initiatives with neighborhood association boards throughout FY25. Distill goals into neighborhood priorities. Incorporate actionable, measurable targets and initiatives into CCCP priorities. Drive equity and inclusion in goals and targets. Support neighborhoods with event advice, 6-8 microgrants, consultation and/or media/marketing assistance, as appropriate. Implement recommendations of HSE Strategic Plan. Live music on streets. 5 new placemaking activities, as by the end of FY25. Back of newsracks have content 90% of the time. Identify possible amenities expanded or created by the end of FY25. Convene dialogues between neighborhoods and leadership of CMS, private and charter schools. Organize and support public and private partnerships to strengthen neighborhood schools. Update website, then update website content, blog posts and social media postings consistently. 5% increase in in-person or virtual meeting attendance (in South End) and social media</p>

Strategic Priority	Objective	Measures	Target
		stakeholder communications. Use all channels to communicate regularly with stakeholders about a variety of items of interest.	followership through FY25.

### FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	includes programs and initiatives that ensure the city demonstrates inclusivity through commitment to and focus on equity and safeguarding the environment; leadership in financial stewardship; reviewing best practices; and maintaining consistency in approach with an emphasis on effective and efficient services that are accountable, customer focused, and inclusive.	Environmental Sustainability - Continue to invest in, support and partner with Envision Charlotte for Center City initiatives such as sustainable, zero-waste events. Continue to pursue Smart City initiatives that enable Center City to use technology to drive efficiency in ways that benefit the environment, save money and improve social outcomes. Partner with Sustain Charlotte for Center City initiatives, as well.	Provide annual funding support and plan for action with Envision Charlotte. Create CCCP sustainability plan with SVP of Community Development. At least 1 positive story about sustainability in Charlotte in local, regional or national media once a quarter. Continue a staff committee to manage and implement the agreed-upon internal and external strategy with achievable targets and measures for procurement, hiring, purchasing, and programming. Apply the UN inclusion goals to all CCCP events. Utilize tools such as Bamboo HR, Catalyst (formerly The Employers Association), SHRM and advisors for insurance, technology and HR benefits to provide benchmarked and market benefits, compensation, technology and team culture for CCCP. Measure with staff surveys every 2-3 years.

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 2,607,502	\$ 2,913,149	\$ 3,032,574	\$ 3,032,574	100.0%
Merit Increase/Raise	\$ 125,312	\$ 119,425	\$ 98,615	\$ 98,615	100.0%
Benefits	\$ 782,943	\$ 840,096	\$ 889,392	\$ 889,392	100.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 3,515,757</b>	<b>\$ 3,872,670</b>	<b>\$ 4,020,581</b>	<b>\$ 4,020,581</b>	<b>100.0%</b>
<b>Operating</b>					
Office Supplies	\$ 36,499	\$ 35,000	\$ 35,000	\$ 35,000	100.0%
Equipment, including maintenance & leases	\$ 20,861	\$ 19,750	\$ 19,750	\$ 19,750	100.0%
General Insurance	\$ 38,557	\$ 40,485	\$ 42,340	\$ 42,340	100.0%
Technology	\$ 120,893	\$ 110,780	\$ 110,780	\$ 110,780	100.0%
Postage & Delivery	\$ 3,583	\$ 3,000	\$ 3,000	\$ 3,000	100.0%
Dues/Subscriptions/Parking	\$ 119,838	\$ 123,800	\$ 125,000	\$ 125,000	100.0%
Depreciation Expense	\$ 152,601	\$ 155,000	\$ 155,000	\$ -	0.0%
Fees, Consulting, Training	\$ 170,247	\$ 108,350	\$ 105,350	\$ 105,350	100.0%
Travel/Meeting/Conf	\$ 70,440	\$ 73,400	\$ 88,200	\$ 88,200	100.0%
MSD 4	\$ 385,954	\$ 589,788	\$ 567,066	\$ 405,066	71.4%
Neighborhood Meetings	\$ 31,173	\$ 15,000	\$ 15,000	\$ 15,000	100.0%
Advertising/Marketing/Communications/PR	\$ 255,828	\$ 223,000	\$ 239,000	\$ 239,000	100.0%
Planning & Dev.	\$ 55,439	\$ 36,000	\$ 39,952	\$ 39,952	100.0%
Economic Dev./ Special Projects	\$ 352,236	\$ 402,496	\$ 421,018	\$ 341,518	81.1%
Ambassador	\$ 785,524	\$ 760,312	\$ 760,312	\$ 760,313	100.0%
Tryon Street Mall/Holiday	\$ 80,037	\$ 101,069	\$ 102,121	\$ 54,602	53.5%
Special Events	\$ 517,760	\$ 933,250	\$ 933,250	\$ 838,250	89.8%
Quarters/Rent	\$ 384,238	\$ 259,455	\$ 264,324	\$ 264,324	100.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 3,581,708</b>	<b>\$ 3,989,935</b>	<b>\$ 4,026,463</b>	<b>\$ 3,487,445</b>	<b>86.6%</b>
<b>Total Expenditures</b>	<b>\$ 7,097,465</b>	<b>\$ 7,862,605</b>	<b>\$ 8,047,044</b>	<b>\$ 7,508,026</b>	<b>93.3%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ -	\$ -	\$ -
Donor Contributions	\$ -	\$ -	\$ -
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 376,097	\$ 329,500	\$ 329,500
<b>Total Revenues</b>	<b>\$ 376,097</b>	<b>\$ 329,500</b>	<b>\$ 329,500</b>

## **Current Board of Directors**

Bill Rogers  
Cathy Bessant  
Dr. Kandi Deitemeyer  
Tracy Dodson  
Frank Emory  
Dr. Sharon Gaber  
Gau Gupte  
Dr. Mark Holoman  
Christine Katziff  
Tiffani Lewis  
Tom Mitchell  
Neelima Sharma

Diane Morais  
Kristi Coleman  
Darryl Dewberry  
Mofina Drayton  
Rob Engel  
Kodwo Ghartey-Tagoe  
Ken Haynes  
Marcus Jones  
Dr. Valerie Kinloch  
Dan Lugo  
Brian Natwick  
John Shimp

Steve Bagwell  
Malcomb Coley  
Dena Diorio  
Geroge Dunlap  
Tom Finke  
Malcolm Graham  
Dr. Crystal Hill  
Sam Judd  
Janet LeBar  
Dr. Rick Mathieu  
Pat Rodgers

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## FY 2025 Financial Partner Agency Summary

### Agency Name: **Charlotte Regional Visitors Authority – Film Commission**

#### Agency Description

The Charlotte Regional Visitors Authority (CRVA) is an independent Authority established under the Charter Of the City of Charlotte. The CRVA , leads in destination development, marketing and venue management expertise. Brands supported by the CRVA include the Charlotte Convention Center, Spectrum Center, Bojangles Coliseum, Ovens Auditorium, NASCAR Hall of Fame, and the Charlotte Airport Visitors Center.

#### Agency Established

2004

#### Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$150,000	\$150,000	\$0

#### Total years financial partner with City of Charlotte

69 years

#### FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Effectively promote the Charlotte Region as a location for film productions	Number of qualified film/TV prospects/leads generated	150	165	71
Effectively promote the Charlotte Region as a location for film productions	Number of feature film opportunities generated	25	27	13
Effectively promote the Charlotte Region as a location for film productions	Total budget for films/TV projects produced	\$45.0 Million	\$54.7 Million	\$8.03* Million
Effectively promote the Charlotte Region as a location for film productions	Number of hotel room nights generated from the film industry	6,000	10,968	2,535
Effectively promote the Charlotte Region as a location for film productions	Number of film crew positions filled locally	2,300	4,441	1,306

\*Due to the Writer’s and Actors’ strikes our numbers/projects have been impacted.

#### Population served

The CRVA directly serves the hospitality-related businesses, the local population through job creation, visitors to the area, and the greater charlotte community.

## Council Priority Area(s)



Transportation, Planning  
and Environment



Workforce & Business  
Development



Well-Managed  
Government

### Describe the activities that will be supported through requested city funding

The primary focus of the Charlotte Regional Film Commission (CRFC) is to recruit films (studio/independent/documentaries), TV series, reality shows, commercials, music videos and still photography to Charlotte and the Charlotte region. The CRFC office provides support services to production companies and producers, which includes information on locations, crew, equipment, stages, and contacts with federal, state, county, and city governments. The CRFC also assists with all necessary permits and information on grants and incentives. The Charlotte Regional Film Commission falls under the umbrella of CRVA and is a subset of Visit Charlotte. The positioning of the CRFC gives it strong connectivity to create/sustain jobs and opportunities through visitor spending. Productions who utilize Charlotte as a backdrop stay in local hotels, eat in local restaurants, purchase materials and use services from local vendors. This activity creates valuable tax revenue that benefits Charlotte.

### FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Effectively promote the Charlotte Region as a location for film productions	Number of qualified film/TV prospects/leads generated	150
Workforce & Business Development	Effectively promote the Charlotte Region as a location for film productions	Number of feature film opportunities generated	25
Workforce & Business Development	Effectively promote the Charlotte Region as a location for film productions	Total budget for films/TV projects produced	\$45.0 Million
Workforce & Business Development	Effectively promote the Charlotte Region as a location for film productions	Number of hotel room nights generated from the film industry	6,000
Workforce & Business Development	Effectively promote the Charlotte Region as a location for film productions	Number of hotel room nights generated from the film industry	2,300

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Well-managed Government		Provide cultural celebrations that foster respect and open-mindedness for other cultures. Celebrating our differences, as well as our common interests, helps unite and educate us. It allows us to understand different perspectives, broaden our own, and fully experience and educate ourselves.	Six cultural celebrations targeting 350 CRVA employees.
Well-managed Government		Provide several DEI training sessions and events throughout the year, representing a broad range of ideas and initiatives. We do this to create a workplace environment that is safe, inclusive, and equitable for as many identities as possible.	Facilitate four in-person DEI trainings and two online DEI training sessions for full-time CRVA staff.

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$24,450,082	\$25,273,683	\$ 26,031,893	\$ 6,860,682	26.4%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$10,401,126	\$11,629,090	\$ 11,977,963	\$ 2,991,105	25.0%
<b>Subtotal Personnel Expenses</b>	<b>\$34,851,208</b>	<b>\$36,902,773</b>	<b>\$ 38,009,856</b>	<b>\$ 9,851,786</b>	<b>25.9%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 5,331,286	\$16,912,700	\$ 8,110,000	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$11,512,945	\$12,902,297	\$ 13,289,366	\$ 7,587,729	57.1%
Facilities (e.g. rent, utilities)	\$10,014,842	\$ 7,350,560	\$ 7,571,077	\$ 435,019	5.7%
Office Supplies	\$ 2,063,272	\$ 1,457,507	\$ 1,501,232	\$ 110,895	7.4%
Travel & Training	\$ 1,678,044	\$ 2,250,878	\$ 2,318,404	\$ 1,625,946	70.1%
Technology	\$ -	\$ -	\$ -	\$ -	0.0%
Cost of Merchandise Sold	\$ 5,715,497	\$ 4,870,178	\$ 5,016,283	\$ -	0.0%
Contract Services	\$13,061,616	\$ 7,716,163	\$ 7,947,648	\$ 569,433	0.0%
Ticket System Charges	\$ 140,598	\$ 149,200	\$ 153,676	\$ -	0.0%
Insurance	\$ 850,207	\$ 960,915	\$ 989,742	\$ 279,754	0.0%
Business Development	\$ 2,257,490	\$ 2,052,764	\$ 2,114,347	\$ 2,114,347	0.0%
Professional Fees	\$ 2,701,922	\$ 2,125,106	\$ 2,188,859	\$ 59,655	0.0%
Dues and Licenses	\$ 1,171,907	\$ 1,450,800	\$ 1,494,324	\$ 326,009	0.0%
Debt Service (Leases, Rentals)	\$ 712,612	\$ 748,221	\$ 770,668	\$ -	0.0%
Miscellaneous	\$ 307,382	\$ 158,798	\$ 163,562	\$ 1,235	0.8%
<b>Subtotal Operating Expenses</b>	<b>\$57,519,620</b>	<b>\$61,106,087</b>	<b>\$ 53,629,189</b>	<b>\$ 13,110,022</b>	<b>24.4%</b>
<b>Total Expenditures</b>	<b>\$92,370,828</b>	<b>\$98,008,860</b>	<b>\$ 91,639,045</b>	<b>\$ 22,961,809</b>	<b>25.1%</b>

	Revenues		
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ 40,606,253	\$ 50,207,759	\$ 47,528,085
Mecklenburg County Funding	\$ 150,000	\$ 150,000	\$ 150,000
Foundation Grants & Funding	\$ -	\$ -	\$ -
Donor Contributions	\$ -	\$ -	\$ -
Fund Balance Draw / (Contribution)	\$ (10,323,439)	\$ 1,000,000	\$ (3,039,040)
Other Revenue	\$ 61,938,014	\$ 46,651,101	\$ 47,000,000
<b>Total Revenues</b>	<b>\$ 92,370,828</b>	<b>\$ 98,008,860</b>	<b>\$ 91,639,045</b>

**If requesting funding for a specific program within your agency, please provide description of the specified program**

Film Commission

### Overall Program Budget

	Expenditures FY 2023- FY 2025					Percent city request of overall budget
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST		
<b>Personnel</b>						
Salaries	\$ 155,826	\$ 159,571	\$ 164,358	\$ 94,358		57.4%
Merit	\$ -	\$ -	\$ -	\$ -		0.0%
Benefits	\$ 68,790	\$ 74,310	\$ 76,539	\$ 31,539		41.2%
<b>Subtotal Personnel Expenses</b>	<b>\$ 224,616</b>	<b>\$ 233,881</b>	<b>\$ 240,897</b>	<b>\$ 125,897</b>		<b>52.3%</b>
<b>Operating</b>						
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -		0.0%
Communications (e.g. publishing, marketing)	\$ 26,693	\$ 52,200	\$ 53,766	\$ 29		0.1%
Facilities (e.g. rent, utilities)	\$ -	\$ -	\$ -	\$ -		0.0%
Office Supplies	\$ 217	\$ 600	\$ 618	\$ 618		100.0%
Travel & Training	\$ 17,413	\$ 25,915	\$ 26,692	\$ 6,692		25.1%
Technology	\$ -	\$ -	\$ -	\$ -		0.0%
Cost of Merchandise Sold	\$ -	\$ -	\$ -	\$ -		0.0%
Contract Services	\$ 17,873	\$ 29,064	\$ 29,936	\$ 14,936		49.9%
Ticket System Charges	\$ -	\$ -	\$ -	\$ -		0.0%
Insurance	\$ -	\$ -	\$ -	\$ -		0.0%
Business Development	\$ -	\$ -	\$ -	\$ -		0.0%
Professional Fees	\$ -	\$ 1,775	\$ 1,828	\$ 1,827		99.9%
Dues and Licenses	\$ 1,348	\$ -	\$ -	\$ -		0.0%
Debt Service (Leases, Rentals)	\$ -	\$ -	\$ -	\$ -		0.0%
Miscellaneous	\$ 54	\$ -	\$ -	\$ -		0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 63,598</b>	<b>\$ 109,554</b>	<b>\$ 112,841</b>	<b>\$ 24,102</b>		<b>21.4%</b>
<b>Total Expenditures</b>	<b>\$ 288,214</b>	<b>\$ 343,435</b>	<b>\$ 353,738</b>	<b>\$ 150,000</b>		<b>42.4%</b>

	Revenues		
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ 150,000	\$ 150,000	\$ 150,000
Foundation Grants & Funding	\$ -	\$ -	\$ -
Donor Contributions	\$ -	\$ -	\$ -
Fund Balance Draw / (Contribution)	\$ (11,786)	\$ 43,435	\$ 53,738
Other Revenue	\$ -	\$ -	\$ -
<b>Total Revenues</b>	<b>\$ 138,214</b>	<b>\$ 193,435</b>	<b>\$ 203,738</b>

### Current Board of Directors

Jon Dressler	Boris Bunich	Lorie Spratley
Mike Evans	Thomas Dolan	Clarke Allen
Kimberly Edmonds Nelson	Tripp Cagle	Ervin Gourdine
Larken Egleston	Marcie Kelso	Vinay Patel
Erma Allen		

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## FY 2025 Financial Partner Agency Summary

Agency Name: **Charlotte Regional Visitors Authority – Visit Charlotte**

### Agency Description

The Charlotte Regional Visitors Authority (CRVA) is an independent Authority established under the Charter of the City of Charlotte. The CRVA leads in destination development, marketing and venue management expertise. Brands supported by the CRVA include the Charlotte Convention Center, Spectrum Center, Bojangles Coliseum, Ovens Auditorium, NASCAR Hall of Fame, and the Charlotte Douglas Airport Welcome Center.

### Agency Established

2004

### Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$21,861,227	\$23,361,809	\$1,500,582

### Total years financial partner with City of Charlotte

69 years

### FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Promote leisure travel to Charlotte that supports weekend hotel demand.	STR data related to hotel revenue and weekend hotel demand	2.33 Million	2.29 Million	1.17 Million
Maintain and improve Charlotte image and perception.	Charlotte Perception  Measured by CRVA Charlotte Perception Study	32% Strongly Agree	28% Strongly Agree	Year-end target
Focus on short-term regional group bookings, while also looking to the future to secure long-term bookings.	Number of leads & bookings short-term vs. long-term	340,000	397,852	235,674
Continue to elevate planner perception of Charlotte as a meetings and events destination.	Meeting Planner Perception  Measured by Future Partners	38.8% Strong or extremely strong	38.8% Strong or extremely strong	Year-end target

### Population served

The CRVA directly serves the hospitality-related businesses, the local population through job creation, visitors to the area, and the Greater Charlotte community.

## Council Priority Area(s)



Transportation, Planning  
and Environment



Workforce & Business  
Development



Well-Managed  
Government

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$24,450,082	\$25,273,683	\$ 26,031,893	\$ 6,860,682	26.4%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$10,401,126	\$11,629,090	\$ 11,977,963	\$ 2,991,105	25.0%
<b>Subtotal Personnel Expenses</b>	<b>\$34,851,208</b>	<b>\$36,902,773</b>	<b>\$ 38,009,856</b>	<b>\$ 9,851,786</b>	<b>25.9%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 5,331,286	\$16,912,700	\$ 8,110,000	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$11,512,945	\$12,902,297	\$ 13,689,366	\$ 7,987,729	58.3%
Facilities (e.g. rent, utilities)	\$10,014,842	\$ 7,350,560	\$ 7,571,077	\$ 435,019	5.7%
Office Supplies	\$ 2,063,272	\$ 1,457,507	\$ 1,501,232	\$ 110,895	7.4%
Travel & Training	\$ 1,678,044	\$ 2,250,878	\$ 2,318,404	\$ 1,625,946	70.1%
Technology	\$ -	\$ -	\$ -	\$ -	0.0%
Cost of Merchandise Sold	\$ 5,715,497	\$ 4,870,178	\$ 5,016,283	\$ -	0.0%
Contract Services	\$13,061,616	\$ 7,716,163	\$ 7,947,648	\$ 569,433	7.2%
Ticket System Charges	\$ 140,598	\$ 149,200	\$ 153,676	\$ -	0.0%
Insurance	\$ 850,207	\$ 960,915	\$ 989,742	\$ 279,754	28.3%
Business Development	\$ 2,257,490	\$ 2,052,764	\$ 2,114,347	\$ 2,114,347	100.0%
Professional Fees	\$ 2,701,922	\$ 2,125,106	\$ 2,188,859	\$ 59,655	2.7%
Dues and Licenses	\$ 1,171,907	\$ 1,450,800	\$ 1,494,324	\$ 326,009	21.8%
Debt Service (Leases, Rentals)	\$ 712,612	\$ 748,221	\$ 770,668	\$ -	0.0%
Miscellaneous	\$ 307,382	\$ 158,798	\$ 163,562	\$ 1,235	0.8%
<b>Subtotal Operating Expenses</b>	<b>\$57,519,620</b>	<b>\$61,106,087</b>	<b>\$ 54,029,189</b>	<b>\$ 13,510,022</b>	<b>25.0%</b>
<b>Total Expenditures</b>	<b>\$92,370,828</b>	<b>\$98,008,860</b>	<b>\$ 92,039,045</b>	<b>\$ 23,361,809</b>	<b>25.4%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 40,606,253	\$ 50,207,759	\$ 47,928,085
Mecklenburg County Funding	\$ 150,000	\$ 150,000	\$ 150,000
Foundation Grants & Funding	\$ -	\$ -	\$ -
Donor Contributions	\$ -	\$ -	\$ -
Fund Balance Draw / (Contribution)	\$(10,323,439)	\$ 1,000,000	\$ (3,039,040)
Other Revenue	\$ 61,938,014	\$ 46,651,101	\$ 47,000,000
<b>Total Revenues</b>	<b>\$ 92,370,828</b>	<b>\$ 98,008,860</b>	<b>\$ 92,039,045</b>

**If requesting funding for a specific program within your agency, please provide description of the specified program**

Visit Charlotte.

**Overall Program Budget**

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 5,909,341	\$ 6,660,856	\$ 6,860,682	\$ 6,860,682	100%
Merit	\$ -	\$ -	\$ -	\$ -	0%
Benefits	\$ 2,254,736	\$ 2,903,985	\$ 2,991,105	\$ 2,991,105	100%
<b>Subtotal Personnel Expenses</b>	<b>\$ 8,164,077</b>	<b>\$ 9,564,841</b>	<b>\$ 9,851,786</b>	<b>\$ 9,851,786</b>	<b>100%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -	0%
Communications (e.g. publishing, marketing)	\$ 8,696,786	\$ 9,968,358	\$ 10,667,409	\$ 7,987,729	75%
Facilities (e.g. rent, utilities)	\$ 363,581	\$ 422,349	\$ 435,019	\$ 435,019	100%
Office Supplies	\$ 98,737	\$ 107,665	\$ 110,895	\$ 110,895	100%
Travel & Training	\$ 1,120,247	\$ 1,578,588	\$ 1,625,946	\$ 1,625,946	100%
Technology	\$ -	\$ -	\$ -	\$ -	0%
Cost of Merchandise Sold	\$ -	\$ -	\$ -	\$ -	0%
Contract Services	\$ 749,561	\$ 552,848	\$ 569,433	\$ 569,433	100%
Ticket System Charges	\$ -	\$ -	\$ -	\$ -	0%
Insurance	\$ 231,694	\$ 271,606	\$ 279,754	\$ 279,754	100%
Business Development	\$ 2,257,490	\$ 2,052,764	\$ 2,114,347	\$ 2,114,347	100%
Professional Fees	\$ 50,915	\$ 57,917	\$ 59,655	\$ 59,655	100%
Dues and Licenses	\$ 225,264	\$ 316,514	\$ 326,009	\$ 326,009	100%
Debt Service (Leases, Rentals)	\$ -	\$ -	\$ -	\$ -	0%
Miscellaneous	\$ 17,027	\$ 1,200	\$ 1,236	\$ 1,234	100%
<b>Subtotal Operating Expenses</b>	<b>\$ 13,811,302</b>	<b>\$ 15,329,809</b>	<b>\$ 16,189,704</b>	<b>\$ 13,510,022</b>	<b>83%</b>
<b>Total Expenditures</b>	<b>\$ 21,975,379</b>	<b>\$ 24,894,650</b>	<b>\$ 26,041,490</b>	<b>\$ 23,361,808</b>	<b>90%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 22,912,937	\$ 22,293,018	\$ 23,361,808
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ -	\$ -	\$ -
Donor Contributions	\$ -	\$ -	\$ -
Fund Balance Draw / (Contribution)	\$ (1,828,678)	\$ 1,646,132	\$ 1,724,182
Other Revenue	\$ 891,120	\$ 955,500	\$ 955,500
<b>Total Revenues</b>	<b>\$ 21,975,379</b>	<b>\$ 24,894,650</b>	<b>\$ 26,041,490</b>

**Current Board of Directors**

Jon Dressler  
Mike Evans  
Kimberly Edmonds Nelson  
Larken Egleston  
Erma Allen

Boris Bunich  
Thomas Dolan  
Tripp Cagle  
Marcie Kelso

Lorie Spratley  
Clarke Allen  
Ervin Gourdine  
Vinay Patel

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# FY 2025 Financial Partner Agency Summary

Agency Name: **SouthPark Community Partners**

## Agency Description

SouthPark Community Partners (SCP) is a 501c4 nonprofit corporation missioned with the economic and cultural vitality of the SouthPark Municipal Service District (MSD-6), continuing to elevate it as one of the Charlotte region’s premier mixed-use activity centers. Through partnerships with the public, private, and nonprofit sectors, SCP leverages dedicated focus and funding to strengthen SouthPark’s ability to attract and retain employment opportunities and implement projects and programs that enhance the area’s locational advantages for both employment and residential living. Established in 2022, SCP provides professional management of MSD-6 focused on advocacy, capital improvements, economic development, marketing and events, placemaking, and urban planning.

## Agency established

2022

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$1,614,682	\$1,614,682	\$0

## Total years financial partner with City of Charlotte

2

## FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Grow consumer awareness and consideration of the SouthPark brand through a comprehensive marketing and communications program.	Increase YOY social media impressions	Increase 100%	787,000 social media impressions	1,659,362 social media impressions
Be a trusted source for economic development by maintaining and driving users to SCP website to support business and investment growth.	Increase YOY website visitors	Increase 100%	24,000 total website visitors	82,000 total website visitors
Develop opportunities for SouthPark businesses to strengthen capacity and partnerships to drive economic vitality	Host at least 6 SouthPark Stakeholder meetings.	Host 6 meetings	4 meetings hosted	3 meetings hosted, 1 scheduled
Demonstrate/validate value of investment and growth in SouthPark via annual development report.	Conduct research and track data to produce annual development report.	Publish report	Report published in May 2023	Report updated in January 2024; new report to

## Population Served

SouthPark Community Partners promotes SouthPark's long-term economic vitality as a regional center for commerce, shopping, entertainment, and living. SCP serves its mission within the boundaries of Municipal Service District 6. Within that one-square-mile area, SCP directly serves more than 6,000 residents and approximately 1,000 businesses. There are 32,000+ employees within the service area, who reside in all of Charlotte's zip codes; roughly half of SouthPark employees live more than 7 miles away from the MSD. In 2023, SouthPark drew more than 3 million non-work visitors from across the region and beyond.

SCP provides free community programming that is open to all. We also partner with the SouthPark

Association of Neighborhoods to serve the needs of more than 35 neighborhoods that are adjacent to but outside the MSD boundaries.

## Council Priority Area(s)



Transportation, Planning  
and Environment



Workforce & Business  
Development



Safe  
Communities



Great  
Neighborhoods



Well-Managed  
Government

## Describe the activities that will be supported through requested city funding

SouthPark Community Partners works to enhance the vitality of SouthPark through:

1. Promotion, planning, advocacy, and funding of capital investment to enhance the economic vitality of SouthPark, including street lighting, street and sidewalk connections, and pedestrian/multimodal paths.
2. Management of contracts to provide enhanced service needs for SouthPark, including enhancements in hospitality, safety, security, and beautification.
3. Branding, promotion, and marketing of SouthPark to increase tax base and maintain a unique identity for the area.
4. Advocacy for area interests with government, private agencies, business owners, and residents.
5. Enhancing the SouthPark experience through placemaking and events.
6. Convening business and residential stakeholders to enhance SouthPark's sense of community, safety, and economic competitiveness

## If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?

Funding is tied to the millage rate approved by Council in 2022.

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Be a trusted source for economic development by maintaining and driving users to SCP website to support business and investment growth	Website visitors/page views	Increase YOY website visitors by 30%
Workforce & Business Development	Develop opportunities for SouthPark businesses to strengthen capacity and partnerships to drive economic vitality	Number of SouthPark Stakeholder meetings	Host at least 6 dedicated Stakeholder Meetings in FY25

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Demonstrate/validate value of investment and growth in SouthPark via annual development research report	Conduct research and track data to produce annual development report	500 copies distributed; online version promoted through marketing initiatives
Workforce & Business Development	Grow consumer awareness and consideration of SouthPark through a comprehensive marketing and communications program	Social media impressions; earned media mentions	Increase YOY social media impressions by 25%; at least 20 earned media mentions
Transportation & Planning	Advance projects and programs that enhance walkability and pedestrian safety.	Number of new pedestrian improvements (Loop trail segments, sidewalk improvements, crosswalks, etc.)	Two new pedestrian improvements complete by end of FY25

### FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Host community events that are free and open to all.	Proportion of events hosted that are free/open to all	95% of community events are free/open to all
Transportation & Planning	Participate in staff trainings regarding planning, development, placemaking, etc. focused on equity	Percent of staff participation	100% staff participation
Workforce & Business Development	Create paid opportunities for Charlotte creatives/artists	Number of paid opportunities for local creatives/artists	At least 15 opportunities in FY25
Workforce & Business Development	Create opportunities for SouthPark small businesses (locally owned/operated) to participate in programs that drive increased sales, traffic, visits, etc.	Number of locally-owned businesses that participate in SCP-led programs/events	At least 50 small businesses participating

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 214,375	\$ 430,000	\$ 447,200	\$ 447,200	100.0%
Merit	\$ -	\$ 70,000	\$ 73,000	\$ 73,000	100.0%
Benefits/Taxes	\$ 28,537	\$ 85,943	\$ 90,000	\$ 90,000	100.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 242,912</b>	<b>\$ 585,943</b>	<b>\$ 610,200</b>	<b>\$ 610,200</b>	<b>100.0%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 88,328.90	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00	100.0%
Communications (e.g. publishing, marketing)	\$143,274.94	\$214,000.00	\$ 175,000.00	\$ 175,000.00	100.0%
Facilities (e.g. rent, utilities)	\$ 21,897.03	\$ 30,224.46	\$ 32,000.00	\$ 32,000.00	100.0%
Office Supplies	\$ 4,863.48	\$ 5,000.00	\$ 5,000.00	\$ 5,000.00	100.0%
Operating (e.g. insurance, payroll fees, printing)	\$ 10,685.42	\$ 21,300.00	\$ 22,000.00	\$ 22,000.00	100.0%
Professional Services	\$ 17,330.11	\$ 42,600.00	\$ 40,000.00	\$ 40,000.00	100.0%
Travel & Training	\$ 6,934.83	\$ 15,000.00	\$ 15,000.00	\$ 15,000.00	100.0%
Technology	\$ 3,988.26	\$ 7,900.00	\$ 7,500.00	\$ 7,500.00	100.0%
<b>Subtotal Operating Expenses</b>	<b>\$297,302.97</b>	<b>\$352,024.46</b>	<b>\$ 312,500.00</b>	<b>\$ 312,500.00</b>	<b>100.0%</b>
<b>Program</b>					
Programming and Events	\$ 72,480	\$ 200,000	\$ 200,000	\$ 140,000	70.0%
Planning and Placemaking	\$ 59,288	\$ 210,000	\$ 155,000	\$ 155,000	100.0%
Community Development	\$ 16,091	\$ 45,000	\$ 45,000	\$ 45,000	100.0%
Economic Development	\$ 64,246	\$ 82,660	\$ 80,000	\$ 80,000	100.0%
Safety	\$ -	\$ 15,000	\$ 50,000	\$ 50,000	100.0%
Special Projects	\$ 6,324	\$ 10,000	\$ 10,000	\$ 10,000	100.0%
Infrastructure	\$ 73,250	\$ 303,750	\$ 160,000	\$ 160,000	100.0%
Reserve/Fund Balance	\$ 100,000	\$ 230,052	\$ 50,000	\$ 50,000	100.0%
<b>Subtotal Program Expenses</b>	<b>\$ 391,680</b>	<b>\$ 1,096,462</b>	<b>\$ 750,000</b>	<b>\$ 690,000</b>	<b>92.0%</b>
<b>Total Expenditures</b>	<b>\$ 931,895</b>	<b>\$ 2,034,429</b>	<b>\$ 1,672,700</b>	<b>\$ 1,612,700</b>	<b>96.4%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ -	\$ -	\$ -
Donor Contributions	\$ -	\$ -	\$ -
Service Fees	\$ 3,100	\$ -	\$ 60,000
Other Revenue	\$ 1,354,028	\$ 1,614,682	\$ 1,614,682
<b>Total Revenues</b>	<b>\$ 1,357,128</b>	<b>\$ 1,614,682</b>	<b>\$ 1,674,682</b>

## Current Board of Directors

R. Christopher Thomas	Shelly Domenech	Bill Bartee
Randall Thomas	Richis Faulkenberry	Todd Collins
Robert Aulebach	Dan Holmes	Fran West
Leslie Fisher	Thad Moore	Gareth Scott
Jonathan Polking	Jessica Rossi	James Scruggs
Adam W. Rhew	Lauren Russell	Ted Wolfe

# FY 2025 Financial Partner Agency Summary

Agency Name: **University City Partners**

## Agency Description

University City Partners strategically allocates resources across three core areas: planning and transportation, economic development, and marketing and communications. Serving as a catalyst, facilitator, and thought leader, our organization actively promotes public/private partnerships to foster and sustain the economic vitality of University City.

As the primary information authority on key issues related to University City, we actively engage in remediating historical land use decisions, steering towards a transit-oriented future, and transforming auto-dominated patterns developed over several decades. Furthermore, our emphasis on UNC Charlotte as a regional catalyst underscores our commitment to encouraging continued economic development and intelligent growth through collaborative regional planning with adjacent jurisdictions.

We recognize the importance of effective communication in building community visibility for the area and preparing for multimodal transportation that seamlessly connects across the region. By advocating for a robust regional center, particularly within the commercial core near University Place, our aim is to attract surplus tax revenue from surrounding areas, fortifying the economic vitality of the greater Charlotte community. Through these initiatives, University City Partners.

## Agency Established

2003

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$1,380,857	\$1,408,474	\$27,617

## Total years financial partner with City of Charlotte

21 years

## FY2024 Performance Measures and Targets

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Promote University City's high quality of life and small businesses, as well as the presence of major institutions.	Pitch and communicate 15 news releases and newsletter stories quarterly	15 Stories	15 Stories	<i>Not reported</i>
Promote and support small business growth in partnership with Mecklenburg County economic development department	Highlight unique 20 small businesses in University City while also connecting them with resources /information	20 Businesses	20 Businesses	10 Businesses
Be a trusted source for economic development by maintaining and driving users to UCP website to support business and investment growth.	Measure increases in website utilization targeting 6% increase year over year	6% Increase	100%	100%

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Clearly communicate quality of life and business assets to shift perception as “back-office center” (per workplace/ business study) in partnership with City Economic Development.	Develop and execute a data focused communications strategy to change perception of University City	35% complete of multiyear Effort	50%	50%
Demonstrate/validate value of investment and growth in University City via annual development report.	Track investment annually to produce annual development report	100%	100%	50%
Advocate and secure investment in mobility infrastructure via CIP planning and implementation.	Investments for University City included in the CIP plan.	FY 2024 Budget Provides \$10 million for congestion mitigation improvements in the South Charlotte, Steele Creek, and University City areas	100%	50%
Create identity and directional infrastructure via investment in wayfinding signage.	Phases 1 and 2 installed (appx 10 signs)	Thorough proposal completed for all phases, in protracted NCDOT review process. Procurement for fabrication and installation complete	90%	45%
Develop first mile/last mile, TDM strategy with implementation plan	Completion of the strategy, Solicit private funding for implementation	CATS implementing on-demand micro-transit “early 2024”	25%	50%
Enhance mobility experience via greenway improvements.	Install 2 environment and placemaking improvement in partnership with UNC Charlotte Botanical Garden.	1 initiative	80%	50%
Increase mobility safety by closing gaps in missing infrastructure.	Crosswalks from University Place across WT Harris Blvd	Advancement	50%	20%
Major corridors have clean streets relatively free of litter with properly maintained lawns and trees.	Expand beyond the right of way maintenance contract with separate on-call service for immediate needs and those outside the scope of existing work.	26+ weeks exemplary service	100%	50%
Convene business and security agencies to support community safety and policing.	Quarterly meetings, quarterly updates.	2	100%	50%
Add LPR’s on private property to monitor state roads, referred to by CMPD as “force multipliers”	Install 10 locations	7	100%	100%
Promote use of MyCMPD, CLT+ apps to public	5% adoption over other Divisions	>2%	100%	50%

Objective	Measures	Target	FY2023 Actual	FY2024 Mid-Year
Advocate and promote mix of housing types in new development	Minimum 2 community events Minimum 26 Seasonal farmers markets (Saturdays, May – October)	2 Large scale community events – 26 Farmers Markets	100%+	100%
Leadership in financial stewardship, best practices, consistency in approach that is accountable, customer focused and inclusive.	Clean audit Exceptional performance; within budget expectations Engaged and informed board of directors via semi monthly meetings Annual survey	EOY 50% Planned	100% 100% 100%	100% 50% Planned

## Population served

MSD5, situated in northeastern Mecklenburg County, is delineated by Mallard Creek Church Road to the north, NC 49 to the east, Neal Road to IBM Drive moving south to west, and Mallard Creek Road along the western edge. Encompassing significant areas such as University Research Park, Innovation Park, University Executive Park, UNC Charlotte, Atrium University City Hospital, and four transit station areas along Tryon Street.

University City takes pride in serving a distinctive population, marked by its exceptional characteristics. Boasting over 30,000 students at UNC Charlotte from 47 states and 105 countries, it stands out as one of Charlotte's most diverse and youthful areas, with its 20-34 age group surpassing the Mecklenburg County average by 11%.

Beyond its youthful demographic, University City reflects a rich diversity—33% white, 43% black, and 16% Asian—underscoring the varied composition of its residents in comparison to Mecklenburg County at large (48%, 31%, 5%).

This comprehensive demographic overview is complemented by anecdotal insights into the population served by University City Partners. Featuring a predominantly middle-class profile, the community encompasses young families, professors, students, businesses of all sizes, and professionals at various career stages. As the city's second-largest employment

## Council Priority Area(s)



Transportation, Planning and Environment



Workforce & Business Development



Safe Communities



Great Neighborhoods



Well-Managed Government

## Describe the activities that will be supported through requested city funding

Objective:

Improve the perception of University City as an attractive place to live, work, play, and learn through targeted public relations, social media, and marketing initiatives. Prioritize the following key areas:

Safe Community:

Enhance pedestrian infrastructure and right-of-way maintenance.

Invest in community safety measures to align with other economic centers in Charlotte.

Business Growth:

Develop strategies to recruit, retain, and grow businesses.

Encourage small business investment through Mecklenburg County partnerships.

Strategic Communications and Branding:

Improve area perception through strategic communications and branding.

Highlight educational assets as key talent generators for the city.

**Website Enhancement:**

Continue to upgrade University City Partners' websites as integral tools for brokers, economic developers, visitors, and residents.

**Collaboration and Expertise:**

Collaborate with economic development entities to market MSD properties and investment opportunities.  
Track economic development trends to act as a resident expert.

**Partnerships and Support:**

Initiate partnerships aligned with UCP's mission and strategic plan.  
Support business partnership with UNC Charlotte.

**Transportation Advocacy:**

Convene transportation partners to advocate for multimodal infrastructure investments.  
Promote alternatives to single occupancy automobiles, including improving the bus system and accommodating emerging transportation options.

**Area Development Implementation:**

Implement University City Area Plan, North Corridor Transit Station Plan, and University City Research Park plan through private investment and capital improvement funds.

**Way-finding Program:**

Implement a way-finding program to enhance aesthetics, reduce sign clutter, and improve navigation in University City.

**Parks and Recreation:**

Work with Mecklenburg County to address the lack of quality park space in University City.

**Zoning and Development Oversight:**

Collaborate with property owners and planning staff to ensure transit-supportive rezoning petitions within the MSD.

**Development and Investment:**

Champion planning and visioning programs/projects focusing on strong centers, expanded mobility options, safe communities, business support, and strategic communications.

**Community Safety:**

Partner with CMPD and local security agencies for safe community initiatives.  
Implement measures such as SEPTED analysis, LPR installation, and stakeholder communication platform to reduce crime.

**Operational Excellence:**

Uphold nonprofit best practices for governance and operations.

Maintain transparency, engage the community, develop and manage budgets responsibly, and retain talented staff.

Through these initiatives, University City Partners aims to create a vibrant, safe, and thriving community, fostering economic growth and enhancing the overall quality of life.

**If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?**

Supplementary funding is earmarked to accommodate cost of living increases and adjustments for inflation. The anticipated growth for these allocations is conservatively estimated at approximately 2%. This additional funding is crucial for ensuring that University City Partners can effectively address rising living expenses and offset inflationary impacts, thereby sustaining the organization's commitment to its objectives.

**FY2025 Performance Measures and Targets**

Strategic Priority	Objective	Measures	Target
Workforce and Business Development	1. Promote University City’s high quality of life and small businesses, as well as the presence of major institutions. 15 Stories	Pitch and communicate 15 news releases and newsletter stories quarterly	15 Stories
Workforce and Business Development	2. Promote and support small business growth in partnership with Mecklenburg County economic development department	Highlight unique 20 small businesses in University City while also connecting them with resources / information	20 Businesses
Workforce and Business Development	3. Be a trusted source for economic development by maintaining and driving users to UCP website to support business and investment growth.	Measure increases in website utilization targeting 6% increase year over year	6% Increase
Workforce and Business Development	4. Clearly communicate quality of life and business assets to shift perception as “back-office center” (per workplace/business study) in partnership with City Economic Development.	Develop and execute a data focused communications strategy to change perception of University City	35% complete of multi-year effort
Workforce and Business Development	5. Demonstrate/validate value of investment and growth in University City via annual development report.	Track investment annually to produce annual development report	100%
Transportation, Planning and Development	1. Advocate and secure investment in mobility infrastructure via CIP planning and implementation.	Investments for University City included in the CIP plan.	FY 2025 Budget Provides \$10 million for congestion mitigation improvements in the South Charlotte, Steele Creek, and University City areas
Transportation, Planning and Development	2. Create identity and directional infrastructure via investment in wayfinding signage.	Thorough proposal completed for all phases, in protracted NCDOT review process. Procurement for fabrication and installation complete	100%
Transportation, Planning and Development	3. Develop first mile/last mile, TDM strategy with implementation plan	Completion of the strategy, Solicit private funding for implementation	CATS implementing on-demand micro-transit “early 2025”
Transportation, Planning and Development	4. Enhance mobility experience via greenway improvements.	Install 2 environment and placemaking improvements	Identify project and timeline for completion with partners.
Transportation, Planning and Development	5. Increase mobility safety by closing gaps in missing infrastructure.	Support 1 greenway project	Advancement
Safe Communities	1. Major corridors have clean streets relatively free of litter with properly maintained lawns and trees.	Support cleaning of major corridors with a contractor	26+ weeks exemplary service

Strategic Priority	Objective	Measures	Target
Safe Communities	2. Convene business and security agencies to support community safety and policing.	Quarterly meetings, quarterly updates.	2
Safe Communities	3. Participate in initiatives collaboratively with CMPD to enhance safety	Identify and share 2 CMPD related stories to inform UC area on safety initiatives and activities	2
Great Neighborhoods	1. Advocate and promote mix of housing types in new development	2 new housing developments permitted or built with mix of housing types 1 new development with affordable units permitted or built	2 1
Great Neighborhoods	2. Convene community through successful execution of events to demonstrate vitality of community; Execute community perception surveys	Minimum 2 community events Minimum 26 Seasonal farmers markets (Saturdays, May – October)	2 Large scale community events – 26 Farmers Markets
Well Managed Government	1. Leadership in financial stewardship, best practices, consistency in approach that is accountable, customer focused and inclusive.	Clean audit Exceptional performance; within budget expectations	EOY 50% Planned
		Engaged and informed board of directors via semimonthly meetings Annual survey on priorities and performance.	

### FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Support local MBE, WBE and SBE in the MSD service area.	Provide resources to fifteen (15) MBE, WBE and SBE businesses in the UC area. Services can include but are not limited to marketing, promotions, event planning, etc.	15
Transportation & Planning	Support mobility and connectivity projects in MSD service area.	Identify and support one (1) municipal project in support one connectivity and/or mobility.	1
Safe Communities	Support CMPD on safety initiatives in MSD area.	Support CMPD on two (2) informative and pertinent stories to the local community.	2
Great Neighborhoods	Continue to support the work as outlined in the mission of the organization to positively impact the local diverse community in University City.	As outlined in University City Partners' 2024 Performance Objectives Report, 68% of the stated goals directly impact areas of equity to include (1) workforce and business development, (2) transportation, planning and development, (3) safe communities, (4) great neighborhoods and, (5) well managed government.	50%
Well-managed Government	Support diverse board representation of the community to include geographical, business size and MBE, WBE and SBE representation.	Add one (1) additional diverse voice to the MSD board	1
Well-managed Government	Support residential engagement in the University City trade area.	Host five (5) residential meetings.	5

# Overall Agency Budget

Expenditures FY 2023- FY 2025					Percent city
	FY 2023	FY 2024	FY 2025	FY 2025	request of
	ACTUAL	BUDGET	PROJECTED BUDGET	CITY REQUEST	overall budget
<b>Personnel</b>					
Salaries	\$ 364,620	\$ 555,671	\$ 600,125	\$ 600,125	100.0%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 85,483	\$ 104,620	\$ 111,900	\$ 111,900	100.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 450,103</b>	<b>\$ 660,291</b>	<b>\$ 712,025</b>	<b>\$ 712,025</b>	<b>100.0%</b>
<b>Operating</b>					
<b>STAFF SUPPORT</b>					
Travel/Conferences/Meetings	\$ 14,300	\$ 20,000	\$ 25,000	\$ 25,000	100.0%
Membership/Dues	\$ 8,465	\$ 9,634	\$ 10,000	\$ 10,000	100.0%
Professional Development	\$ 5,400	\$ 10,000	\$ 10,300	\$ 10,300	100.0%
<b>OFFICE SUPPORT</b>					
Rent	\$ 70,338	\$ 72,976	\$ 78,084	\$ 78,084	100.0%
Office Expenses	\$ 10,000	\$ 18,000	\$ 18,540	\$ 18,540	100.0%
Telephone	\$ 11,100	\$ 8,489	\$ 8,744	\$ 8,744	100.0%
Technology	\$ 11,000	\$ 20,000	\$ 15,000	\$ 15,000	100.0%
Intern Support	\$ -	\$ 20,000	\$ 30,000	\$ 30,000	100.0%
Professional Services	\$ 40,000	\$ 30,000	\$ 30,900	\$ 30,900	100.0%
Accounting	\$ 16,000	\$ 12,552	\$ 13,000	\$ 13,000	100.0%
Annual Audit	\$ 13,500	\$ 10,043	\$ 10,344	\$ 10,344	100.0%
Miscellaneous	\$ 15,000	\$ 832	\$ 2,008	\$ 2,008	100.0%
Insurance (Liability, Director & Officers)	\$ 4,000	\$ 2,076	\$ 3,000	\$ 3,000	100.0%
<b>GENERAL MARKETING</b>					
Strategic Events	\$ 174,500	\$ 150,000	\$ 200,000	\$ 200,000	100.0%
Newsletter	\$ 24,000	\$ 20,000	\$ 28,000	\$ 28,000	100.0%
Printing	\$ 10,000	\$ 20,000	\$ 40,000	\$ 40,000	100.0%
University City Website	\$ 17,000	\$ 5,000	\$ 8,000	\$ 8,000	100.0%
Social Media	\$ 15,000	\$ 15,000	\$ 15,450	\$ 15,450	100.0%
Radio/Internet/Other - Advertising	\$ -	\$ -	\$ 5,000	\$ 5,000	100.0%
PR and Communications	\$ 95,000	\$ 92,700	\$ 125,000	\$ 125,000	100.0%
Printing - Advertising	\$ 25,000	\$ 20,240	\$ 25,000	\$ 25,000	100.0%
<b>ECONOMIC DEVELOPMENT</b>					
Market Data Research/Maintenance	\$ 15,000	\$ 1,868	\$ 15,000	\$ 15,000	100.0%
Outreach & Communications	\$ 165,000	\$ 22,265	\$ 30,000	\$ 30,000	100.0%
Special Projects/Planning - Capital Projects/Plans	\$ 60,000	\$ 37,891	\$ 40,000	\$ 40,000	100.0%
Special Projects - N Tryon/UCity Blvd Landscaping	\$ -	\$ 51,000	\$ 5,000	\$ 5,000	100.0%
Special Projects - Clean Streets	\$ 24,000	\$ 50,000	\$ 80,000	\$ 80,000	100.0%
<b>SMALL BUSINESS INITIATIVE (City of Charlotte - Small Business Grant)</b>					
City of Charlotte - Small Business Grant	\$ -	\$ 237,500	\$ -	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 843,603</b>	<b>\$ 958,066</b>	<b>\$ 871,370</b>	<b>\$ 871,370</b>	<b>100.0%</b>
<b>Total Expenditures</b>	<b>\$1,293,706</b>	<b>\$1,618,357</b>	<b>\$ 1,583,395</b>	<b>\$ 1,583,395</b>	<b>100.0%</b>

Revenues			
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$1,301,200	\$ 1,380,857	\$ 1,408,474
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ 183,046	\$ 275,000	\$ 75,000
Donor Contributions	\$ -	\$ -	\$ -
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 54,627	\$ 150,894	\$ 99,921
<b>Total Revenues</b>	<b>\$1,538,872</b>	<b>\$ 1,806,751</b>	<b>\$ 1,583,395</b>

### Current Board of Directors

Stuart Parks  
 Ryan Wetherington  
 Amie Guy  
 Kelly Bradley  
 Tom Creter  
 Renee Perkins Johnson

Joyce Tompkins  
 Richmond Baker  
 Jerry Boggs  
 Mohammed Idilbi  
 Alyson Craig  
 Leslie Johnson

Bill Leonard  
 Betty Doster  
 Katie Maloomian  
 Phil Nicholenko  
 George Dunlap  
 Liz Babson

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# Housing and Neighborhood Services

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# FY 2025 Financial Partner Agency Summary

Agency Name: **Carolinas CARE Partnership**

## Agency Description

The Carolinas CARE Partnership is dedicated to seeking justice through health and housing. We focus our efforts on serving those in our communities who suffer from inequities the most. This especially includes the LGBTQIA community, BIPOC communities and those living with HIV. Carolinas CARE Partnership has a history of making a difference in the lives of persons living in our communities. It is our goal to ensure a high quality of life for our clients by meeting their health and housing needs through our initiatives, partnerships, and collaborations. To achieve this mission, the Carolinas CARE Partnership is dedicated to coordinating, developing and providing care, service, training, education, prevention and housing programs that address the complex issues of the communities that we serve. We have a strong focus on serving those impacted by the HIV/AIDS epidemic in our regional community.

Programs implemented by the Carolinas CARE Partnership include: HIV, Syphilis and Hepatitis C Counseling and Testing at Non-Traditional Sites; Linkage to HIV Care and Treatment; Training Institute; HOPWA (Housing Opportunities for Persons with HIV/AIDS); Homeless Support Services (Permanent Supportive Housing), Mental Health Services for people living with HIV and members of the LGBTQIA community, HRSA hotel/short-term housing program, SAMHSA support for the LGBTQIA community and individuals suffering opioid addictions and also a SAMHSA prescription drug misuse prevention program, and foundation grants designed to address and support the needs of people living with HIV and AIDS, support groups for the HIV community and the LGBTQIA community and our Mobile Testing Unit. The Carolinas CARE Partnership has been the project sponsor for the Housing Opportunities for Persons with AIDS (HOPWA) grant for the metropolitan statistical area (MSA) since 1998 when the first funds were awarded for the region through the City of Charlotte's Neighborhood and Business Services Department.

The funds from this grant are to provide and ensure that low-income people living with HIV/AIDS have access to housing through assistance that includes: short-term assistance for rent, utilities and mortgages; residential substance abuse treatment; end-of-life residential care; supportive services (including but not limited to housing case management, mental health services and permanent housing placement, nutrition, educational services, employment services, life skills and transportation services); tenant-based rental assistance; facility based housing; housing information services; and resource identification activities that identify safe, suitable and affordable housing.

The diversity mission of Carolinas CARE Partnership is to reflect the diversity of the country and to build an organization that is representative of the communities we serve. This commitment to diversity strengthens our ability to understand and respond to our total community.

## Agency Established

1989

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$3,598,683	\$3,320,702	(\$277,981)

## Total Years Financial Partner with City of Charlotte

25 Years

## Population Served

Through our HOPWA and Mecklenburg County programs, the Carolinas CARE Partnership specifically serves individuals who are HIV+ and live at or below 80% of the area median income in the 11 county Charlotte MSA as well as their family members. Additionally, through our State funding, CCP serves

individuals who are at risk for HIV, Hepatitis C and Syphilis with prevention and testing. Through our SAMHSA Opt Out and SAMHSA Rx ACE program funding, CCP serves LGBTQIA youth and young adults as well as HIV+ individuals suffering opioid addictions with prevention and harm reduction. Our Transcend Program serves the LGBTQIA community with no additional eligibility requirements

### Council Priority Area(s)



### Describe the activities that will be supported through requested city funding

The Carolinas CARE Partnership is dedicated to seeking justice through health and housing. Carolinas CARE Partnership has a history of making a difference in the lives of persons living in our communities. It is our goal to ensure a high quality of life for our clients by meeting their health and housing needs through our initiatives, partnerships, and collaborations. To achieve this mission, the Carolinas CARE Partnership is dedicated to coordinating, developing and providing care, service, training, education, prevention and housing programs that address the complex issues of HIV/AIDS and those persons directly affected by the epidemic in our regional community. We are dedicated to understanding and focused on supporting the intersectionality of those living with HIV, the LGBTQIA community, BIPOC communities and those suffering from mental health issues and addictions and the unique needs of these communities.

Programs implemented by the Carolinas CARE Partnership include: HIV, Syphilis and Hepatitis C Counseling and Testing at Non-Traditional Sites; Linkage to HIV Care and Treatment; Training Institute; HOPWA (Housing Opportunities for Persons with HIV/AIDS); Homeless Support Services (Permanent Supportive Housing), Ryan White Medical Case Management, Mental Health Services for people living with HIV and members of the LGBTQIA community, HRSA hotel/short-term housing program, SAMHSA support for LGBTQIA community and individuals suffering opioid addiction, and foundation grants designed to address and support the needs of people living with HIV and AIDS, support groups for the HIV community and the LGBTQIA community and our Mobile Testing Unit.

The Carolinas CARE Partnership has been the project sponsor for the Housing Opportunities for Persons with AIDS (HOPWA) grant for the metropolitan statistical area (MSA) since 1998 when the first funds were awarded for the region through the City of Charlotte's Neighborhood and Business Services Department. The funds from this grant are to provide and ensure that low-income people living with HIV/AIDS have access to housing through assistance that includes: short-term assistance for rent, utilities and mortgages; residential substance abuse treatment; end-of-life residential care; supportive services (including but not limited to medical case management, housing case management, mental health services, transportation services, nutritional services, educational services, employment services, life skills and permanent housing placement); tenant-based rental assistance; facility based housing; housing information services; and resource identification activities that identify affordable housing

The City of Charlotte conducts a request-for-proposal process and awards restricted-use HOPWA grants to organizations within the eleven-county MSA. Once the agencies and their awards are chosen by the City, the information is forwarded to CCP who executes the contracts with the agencies and acts as the Project Sponsor for the City. The chosen agencies are qualified to provide housing and/or supportive services for people living with HIV and AIDS. As a result of the grants, low-income people living with HIV/AIDS have access to: short-term assistance with rent, utility and/or mortgage payments to prevent homelessness; residential substance abuse treatment; end-of-life residential care; supportive services (medical case management, housing case management, mental health services, transportation services, nutritional services, educational services, employment services, life skills and permanent housing placement); tenant-based rental assistance; facility based housing; and housing information services. .

These important resources prevent homelessness and allow people living with HIV and AIDS the ability to secure more stable housing situations that help to improve their overall health and well-being. CCP also utilizes these

funds for resource identification activities that help to identify affordable housing options, private landlords who will work with the HOPWA program and other programs and resources available to this population. During FY 2022-2023 the Carolinas CARE Partnership served 642 unduplicated clients and 262 of their family members through the HOPWA program.

**If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?**

The Carolina’s CARE Partnership is requesting an increase equal to the formula funding from HUD for the Charlotte MSA HOPWA programs. Additional funding will be utilized to increase and support the TBRA services and prioritized supportive services. Since the formula increase is an unknown, we calculated a 5% increase above the FY24 award amount for the FY25 request.

**FY2025 Performance Measures and Targets**

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	Through intense supportive services, help clients to maintain or increase income through job skills, job search, time management and life skills. Some clients may increase income through access of mainstream services. Increasing income will help clients become more self-sufficient	The percentage of clients who are able to increase income	80% of clients in the TBRA program or receiving case management services will maintain or increase income
Safe Communities	To help support the City's objective of safe communities by helping low-income HIV+ clients who are suffering from mental health issues or addictions to find support and recovery. Our harm reduction, education and other support services help clients to remain mentally and emotionally stable and healthy so they can be active, positive members of the community.	The number of clients who access our mental health, substance abuse, harm reduction and support group services	200 clients will access services in the fiscal year
Well-managed Government	to support the City objective of well managed government by being good stewards of the HOPWA funding. Making sure that the funding is managed effectively and efficiently using best practices, consistency, accountability and remaining customer focused	the number of clients served with the best possible services in the most effective and efficient way	To serve 807 unduplicated clients with over 1,211 duplicated services

**FY2025 Equity Measures and Targets**

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	To support the City objective of great neighborhoods by ensuring safe and equitable neighborhoods and diverse housing options	the percentage of clients served who will contribute to and benefit from diverse, safe and equitable neighborhood housing	At least 75% of all measures and targets are focused on advancing equity in communities of color, underrepresented communities and/or low-income communities.
Well-managed Government	To support the City objective of well-managed government by providing DEI trainings both internally and externally and also including trainings around gender identity and pronoun use	The number of trainings provided	Provide annually at least one internal and two external trainings around DEI, gender identity and pronoun use

Strategic Priority	Objective	Measures	Target
Well-managed Government	To support the City objective of well managed government by having all organizational policies and procedures reviewed and updated to maintain best practices	review and update of all organizational policies and procedures by an HR consultant with DEI expertise	100% of all policies and procedures reviewed and updated

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$1,316,436	\$1,572,591	\$ 1,785,161	\$ 885,328	49.6%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 333,486	\$ 456,255	\$ 535,548	\$ 265,598	49.6%
<b>Subtotal Personnel Expenses</b>	<b>\$1,649,922</b>	<b>\$2,028,846</b>	<b>\$ 2,320,709</b>	<b>\$ 1,150,926</b>	<b>49.6%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 33,620	\$ 60,448	\$ 50,448	\$ 16,318	32.3%
Facilities (e.g. rent, utilities)	\$ 156,551	\$ 165,833	\$ 176,999	\$ 72,967	41.2%
Office Supplies	\$ 35,155	\$ 32,730	\$ 32,730	\$ 5,000	15.3%
Travel & Training	\$ 82,873	\$ 74,225	\$ 74,225	\$ 24,500	33.0%
Technology	\$ 26,826	\$ 37,000	\$ 37,000	\$ 12,684	34.3%
Subrecipients	\$ 894,448	\$1,065,000	\$ 1,135,552	\$ 1,135,552	100.0%
TBRA (rental and utility vouchers)	\$1,016,190	\$1,066,743	\$ 1,066,743	\$ 729,904	68.4%
Client and Program Services and Supplies	\$ 296,951	\$ 459,695	\$ 307,216	\$ 113,000	36.8%
Repairs and Maintenance	\$ 89,137	\$ 85,200	\$ 85,200	\$ 25,000	29.3%
Insurance	\$ 37,547	\$ 38,000	\$ 38,000	\$ 4,840	12.7%
Other	\$ 34,523	\$ 42,251	\$ 42,251	\$ 30,011	71.0%
<b>Subtotal Operating Expenses</b>	<b>\$2,703,821</b>	<b>\$3,127,125</b>	<b>\$ 3,046,364</b>	<b>\$ 2,169,776</b>	<b>71.2%</b>
<b>Total Expenditures</b>	<b>\$4,353,743</b>	<b>\$5,155,971</b>	<b>\$ 5,367,073</b>	<b>\$ 3,320,702</b>	<b>61.9%</b>

\*it is important to note that one year of funding does not support the entire program. We continue to use the open contracts from previous years to pay for the TBRA program.

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$3,659,844	\$ 4,264,274	\$ 4,209,174
Mecklenburg County Funding	\$ 492,439	\$ 440,914	\$ 702,414
Foundation Grants & Funding	\$ -	\$ 75,000	\$ 75,000
Donor Contributions	\$ 75,143	\$ 106,435	\$ 110,000
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 206,655	\$ 313,523	\$ 303,840
<b>Total Revenues</b>	<b>\$4,434,081</b>	<b>\$ 5,200,146</b>	<b>\$ 5,400,428</b>

**If requesting funding for a specific program within your agency, please provide description of the specified program**

Carolinas CARE Partnership only requests funding for the continuation of the HOPWA program.

The City of Charlotte, awards restricted-use grants to organizations in the eleven-county MSA qualified to provide housing and supportive services for people living with HIV and AIDS. The Carolinas CARE Partnership develops access to: community residences; more affordable housing through rental assistance programs; immediate relief with short-term payments that prevent homelessness; and availability of health and other supportive services.

For FY24, the City of Charlotte awarded restricted use grants to the agencies listed below for the development, enhancement, and advancement of housing and supportive programs for people living with HIV and AIDS:

- House of Mercy
- Dudley’s Place
- Roof Above
- Affinity Health
- Hope Haven
- McLeod Addictive Disease Center
- RAO Community Health
- Mecklenburg County Health Department
- Time Out Youth
- Kintegra Health
- RAIN
- Nsideout Excellence

Services to be provided by the agencies listed above include facility based housing, housing information services, short term rent, mortgage and utility assistance, permanent housing placement and supportive services including, but not limited to transportation services, nutritional services, education services, employment services, mental health counseling, substance abuse treatment, housing case management, linkage to care, life skills, and outreach services.

Carolinas CARE Partnership and its wholly owned subsidiaries, the Regional Housing Partnership and the Regional Housing Partnership II also provide all of the services listed above. Additionally, CCP provides the tenant-based rental assistance for the HOPWA program and resource identification services to seek out additional resources for the community. During FY23, the Carolinas CARE Partnership served 1,132 clients and family members throughout the year with duplicate services counted. The unduplicated clients served were 642. Additionally, 89% of all clients served maintained housing stability as reported on annual CAPER.

## Overall Program Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 700,816	\$ 797,984	\$ 885,328	\$ 885,328	100.0%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 176,017	\$ 235,054	\$ 265,598	\$ 265,598	100.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 876,833</b>	<b>\$1,033,038</b>	<b>\$ 1,150,926</b>	<b>\$ 1,150,926</b>	<b>100%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 13,751	\$ 18,318	\$ 18,318	\$ 18,318	100.0%
Facilities (e.g. rent, utilities)	\$ 101,280	\$ 72,967	\$ 72,967	\$ 72,967	100.0%
Office Supplies	\$ 2,473	\$ 5,000	\$ 5,000	\$ 5,000	100.0%
Travel & Training	\$ 30,322	\$ 24,500	\$ 24,500	\$ 24,500	100.0%
Technology	\$ 14,567	\$ 12,684	\$ 12,684	\$ 12,684	100.0%
Subrecipients	\$ 759,448	\$1,252,892	\$ 1,135,552	\$ 1,135,552	100.0%
TBRA (rental and utility vouchers)	\$ 842,420	\$ 983,673	\$ 1,066,743	\$ 727,904	68.2%
Client and Program Services and Supplies	\$ 175,700	\$ 113,000	\$ 113,000	\$ 113,000	100.0%
Repairs and Maintenance	\$ 81,246	\$ 45,323	\$ 50,000	\$ 25,000	50.0%
Insurance	\$ 21,080	\$ 26,055	\$ 26,055	\$ 4,840	18.6%
Other	\$ 41,029	\$ 26,511	\$ 30,011	\$ 30,011	100.0%
<b>Subtotal Operating Expenses</b>	<b>\$2,083,316</b>	<b>\$2,580,923</b>	<b>\$ 2,554,830</b>	<b>\$ 2,169,776</b>	<b>84.9%</b>
<b>Total Expenditures</b>	<b>\$2,960,149</b>	<b>\$3,613,961</b>	<b>\$ 3,705,756</b>	<b>\$ 3,320,702</b>	<b>89.6%</b>

	Revenues		
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$2,922,753	\$ 3,566,856	\$ 3,659,541
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ -	\$ -	\$ -
Donor Contributions	\$ -	\$ -	\$ -
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 37,396	\$ 47,105	\$ 46,215
<b>Total Revenues</b>	<b>\$2,960,149</b>	<b>\$ 3,613,961</b>	<b>\$ 3,705,756</b>

## Current Board of Directors

Patrick Cayo                      Eddie Clark  
 Sheila Crump                      Scott Elam  
 Michael K. Leonard              Erinn McCullough-Wylie

# FY 2025 Financial Partner Agency Summary

Agency Name: **Crisis Assistance Ministry**

## Agency Description

Crisis Assistance Ministry’s holistic approach helps stabilize housing for the lives of Charlotte’s working poor within the immediate-term and longer-term continuum. Emergency needs are addressed by providing comprehensive eviction prevention aid coupled with counseling to stabilize thousands of families annually.

Whether or not rent or utility assistance is needed, access to food, clothes, shoes, coats, school uniforms, appliances and other household goods are available at no charge via the agency Free Store. Items are donated by the community, new or gently used, and in good condition. Beyond the initial crisis, we also provide longer-term financial empowerment coaching for customers to work one-on-one with a caseworker to identify barriers to financial security and empower them to set goals for the future. Housing stability is guaranteed through subsidies while customers work towards their goals.

## Agency Established

1975

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$550,000	\$575,000	\$25,000

FY24 funding includes \$125,000 in ARPA funding

## Total Years Financial Partner with City of Charlotte

36 Years

## Population Served

Last year, 44,734 individuals benefited from services at Crisis Assistance Ministry. Among those receiving assistance, 60% are female and 40% are male. Of customers served, African American/Black make up 73% of the service population, followed by Caucasian/White at 14%. Hispanic/Latino customers of all ethnicities make up 22% of the population served. Additionally, 42% of those who receive assistance are children/youth under age 18 and 5% are seniors age 65 and older.

Households are primarily located in what Charlotte-Mecklenburg calls the "Corridors of Opportunity" and on average, households spend 63% of their income on housing, twice the nationally recognized percentage to be qualified as affordable. All recipients of services must be a resident of Mecklenburg County. Our target audience lives at or below 200% of the Federal Poverty Level. In addition to assisting thousands who fall well below this threshold, we are directly connected to dozens of agencies serving people with zero income as well as very little income.

## Council Priority Area(s)



## Describe the activities that will be supported through requested city funding

City of Charlotte funding will prevent evictions and utility disconnections for families and individuals in crisis, ensuring they have the ability to move toward financial stability while maintaining safe and stable housing.

Our emergency needs services direct assistance to families in financial crisis by providing customers with emergency rent and utility assistance, financial counseling, household goods, furniture, beds and appliances provided free-of-charge. As a trusted location for housing stability resources, we also engage dozens of local Charlotte agencies that provide critical services for families in poverty. Trained Partner Agency caseworkers, who identify a need for emergency financial assistance through the course of working with their customers, can submit an online referral to a Crisis Assistance Ministry caseworker on their behalf.

City of Charlotte funds are leveraged with private funds raised for eviction prevention and coupled with additional services to ensure basic needs are met. Additional services include:

- Providing donated clothing and household items free of charge to families in need. After receiving these essential items at no cost from the agency Free Store, vulnerable families tell us they are now able to use their limited resources on other life necessities such as food, transportation and medicine. In FY22-23, the program distributed more than 1,118,052 items to benefit 15,451 unique people.
- After immediate needs are met some customers may benefit from additional services such as one-on-one coaching where they are empowered to create pathways towards financial security. Our caseworkers work with customers once per week for approximately 90 days to identify barriers to financial security and empower them to set goals for the future. Housing stability is guaranteed through subsidies while customers work towards their goals.

Your assistance at this critical time will further strengthen our ability to respond to the emergency financial assistance needs of thousands of families. The emergency rent and utility assistance made possible through City of Charlotte funding strengthens the entire community by empowering low-income households to take strides toward family stability and security upon being served here. The additional support last FY was critical in meeting an explosion of need after other stimulus funds stopped abruptly. It was a demonstration of the special public-private partnership that has been established over the years here. The need has not slowed down as challenges meeting the need continue to grow.

### **If requesting increased funding from previous fiscal year, please explain how the additional funds will be used?**

Housing instability has been on a concerning rise, driven by multiple factors including rising rent costs, stagnant wages, and the lack of affordable housing. These challenges have left thousands without a strong safety net if faced with an emergency, as one unexpected expense could cause them to become unstable.

From 2021 to 2022, local rental rates for one-bedroom apartments soared by an average of 17%. At minimum wage, Charlotte residents would have to work 125 hours a week to afford a one-bedroom apartment (\$1,180). This growing disparity between rent and income, coupled with the 25,442 affordable housing unit shortage, has forced many families to rent an apartment that is considerably more than they can afford. An alarming 48% (over 103,000) of Mecklenburg County renters currently face this reality, as they are considered housing-burdened and spend more than 30% of their income on rent and utilities.

Crisis Assistance Ministry plays a vital role in addressing the affordable housing gap in Charlotte. By keeping thousands of families stably housed annually, our emergency financial assistance provides support to households who face the difficult choice of skipping essentials like food or medication in order to pay rent or utilities.

We respectfully request \$575,000, a 5% increase of FY2024's award. This increase reflects the community's growth over the past five years, the rising rent rates, and the failure of wages and benefits to keep up with the need thereby creating years of increased housing instability in Charlotte-Mecklenburg. As a leading provider of directing assistance upstream, your increased support will provide the flexibility to respond to the needs of individuals and families in our community.

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Provide rental assistance for low-income families through the Rental Assistance Program	Number of client households served	558
Great Neighborhoods	Provide utility assistance for low-income families through the City Energy Assistance Program	Number of client households served	779

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	QCFT Community Conversation Guide & Facilitated Community Conversation: Report on Systemic Racism in Mecklenburg County	Percentage of appointed staff who attend.	100%

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 3,868,771	\$ 4,103,748	\$ 4,200,000	\$ 25,000	0.6%
Merit	\$ 590,430	\$ 800,010	\$ 825,000	\$ -	0.0%
Benefits	\$ 269,685	\$ 350,418	\$ 358,320	\$ -	0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 4,728,886</b>	<b>\$ 5,254,176</b>	<b>\$ 5,383,320</b>	<b>\$ 25,000</b>	<b>0.5%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 51,546	\$ 81,720	\$ 81,720	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 99,990	\$ 122,200	\$ 122,200	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 165,847	\$ 167,000	\$ 167,000	\$ -	0.0%
Office Supplies	\$ 35,535	\$ 40,000	\$ 40,000	\$ -	0.0%
Travel & Training	\$ 13,193	\$ 22,500	\$ 22,500	\$ -	0.0%
Technology	\$ 313,139	\$ 261,736	\$ 261,736	\$ -	0.0%
Fees and Services	\$ 256,844	\$ 438,000	\$ 445,988	\$ -	0.0%
Insurance	\$ 35,428	\$ 35,000	\$ 35,875	\$ -	0.0%
Staff/Volunteers Appreciation	\$ 20,072	\$ 27,000	\$ 27,675	\$ -	0.0%
Meeting Expenses	\$ 12,692	\$ 30,390	\$ 31,150	\$ -	0.0%
Financial Security CLT	\$ 17,513	\$ -	\$ -	\$ -	0.0%
Misc. Admin Expenses	\$ 1,991	\$ 7,700	\$ 10,656	\$ -	0.0%
Direct Client Aid	\$ 6,263,618	\$ 5,548,605	\$ 4,313,898	\$ 550,000	12.7%
<b>Subtotal Operating Expenses</b>	<b>\$ 7,287,408</b>	<b>\$ 6,781,851</b>	<b>\$ 5,560,398</b>	<b>\$ 550,000</b>	<b>9.9%</b>
<b>Total Expenditures</b>	<b>\$12,016,294</b>	<b>\$12,036,027</b>	<b>\$ 10,943,718</b>	<b>\$ 575,000</b>	<b>5.3%</b>

Revenues			
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ 1,042,952	\$ 864,050	\$ 725,000
Mecklenburg County Funding	\$ 2,990,866	\$ 2,992,393	\$ 2,992,393
Foundation Grants & Funding	\$ 1,417,072	\$ 1,063,770	\$ 1,063,770
Donor Contributions	\$ 6,117,389	\$ 5,436,230	\$ 5,536,230
Donor Contributions - In-Kind	\$ 5,096,449	\$ 5,655,000	\$ 6,155,000
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 311,256	\$ 524,584	\$ 471,325
<b>Total Revenues</b>	<b>\$ 16,975,984</b>	<b>\$ 16,536,027</b>	<b>\$ 16,943,718</b>

**If requesting funding for a specific program within your agency, please provide description of the specified program**

The City of Charlotte funds requested will support families in need of emergency financial assistance for rent and/or utilities. For customers facing an immediate crisis, we address an array of emergency needs by providing a detailed and thorough assessment which includes emergency rent and utility assistance, financial coaching, clothing, household goods, appliances, and appropriate referrals to additional programs in our community that greatly influence a person’s overall stability such as nutritious food.

Energy Assistance funding is expended by the agency through direct payments to utility companies on behalf of low-income families residing in Charlotte who are unable to pay their utility bills during times of financial crisis. City Emergency Rental Assistance funds are utilized by the agency to assist low-income families residing at specific City-designated addresses who are unable to make rent payments during times of financial crisis.

With your continued partnership in FY2025, we respectfully request \$180,000 for utility assistance and \$395,000 for rental assistance. City of Charlotte Energy Assistance and Emergency Rental Assistance funds are often the final option for families before facing utility disconnection and/or eviction. Your support totaling \$575,000 will help thousands of Charlotte residents will avoid eviction and ultimately, homelessness.

## Overall Program Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 2,373,843	\$ 2,516,512	\$ 2,516,512	\$ 25,000	1.0%
Merit	\$ 362,766	\$ 488,205	\$ 488,205	\$ -	0.0%
Benefits	\$ 170,162	\$ 214,795	\$ 214,795	\$ -	0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 2,906,771</b>	<b>\$ 3,219,512</b>	<b>\$ 3,219,512</b>	<b>\$ 25,000</b>	<b>0.8%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 23,320	\$ 41,929	\$ 41,929	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ 24,382	\$ 27,384	\$ 27,384	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 66,955	\$ 68,001	\$ 68,001	\$ -	0.0%
Office Supplies	\$ 13,838	\$ 15,480	\$ 15,480	\$ -	0.0%
Travel & Training	\$ 2,162	\$ 10,800	\$ 10,800	\$ -	0.0%
Technology	\$ 161,558	\$ 132,764	\$ 132,764	\$ -	0.0%
Fees and Services	\$ 20,384	\$ 34,618	\$ 34,618	\$ -	0.0%
Insurance	\$ 19,131	\$ 18,900	\$ 18,900	\$ -	0.0%
Staff/Volunteers Appreciation	\$ 15,423	\$ 11,070	\$ 11,070	\$ -	0.0%
Meeting Expenses	\$ 3,445	\$ 4,050	\$ 4,050	\$ -	0.0%
Financial Security CLT	\$ -	\$ -	\$ -	\$ -	0.0%
Misc. Admin Expenses	\$ 92	\$ -	\$ -	\$ -	0.0%
Direct Client Aid	\$ 6,263,618	\$ 5,548,605	\$ 4,313,898	\$ 550,000	12.7%
<b>Subtotal Operating Expenses</b>	<b>\$ 6,614,308</b>	<b>\$ 5,913,601</b>	<b>\$ 4,678,894</b>	<b>\$ 550,000</b>	<b>11.8%</b>
<b>Total Expenditures</b>	<b>\$ 9,521,079</b>	<b>\$ 9,133,113</b>	<b>\$ 7,898,406</b>	<b>\$ 575,000</b>	<b>7.3%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 1,042,952	\$ 864,050	\$ 725,000
Mecklenburg County Funding	\$ 2,990,866	\$ 2,992,393	\$ 2,992,393
Foundation Grants & Funding	\$ 1,096,042	\$ 840,379	\$ 659,538
Donor Contributions	\$ 4,729,002	\$ 4,293,690	\$ 3,378,874
Donor Contributions - In-Kind	\$ 62,601	\$ 62,601	\$ 62,601
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ 277,932	\$ 80,000	\$ 80,000
<b>Total Revenues</b>	<b>\$ 10,199,395</b>	<b>\$ 9,133,113</b>	<b>\$ 7,898,406</b>

## 2024 Crisis Assistance Ministry Board of Directors

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Mecklenburg Community Church

Deborah Brewer

Retired/Community Volunteer

**Lucinda Blue**

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**Stuart Christhilf (Vice Chair)**

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Camino Health Center

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**Stuart Proffitt**

Proffitt Dixon Partners

**Nikhil Sawant (Treasurer)**

Foundation For The Carolinas

**Ken Szymanski**

Retired, Community Volunteer

# FY 2025 Financial Partner Agency Summary

Agency Name: **DreamKey Partners, Inc.**

(Formerly Charlotte Mecklenburg Housing Partnership)

## Agency Description

DKP is a nonprofit agency that provides affordable housing by administering comprehensive services that include pre- and post-homeownership counseling, mortgage delinquency prevention and default counseling, sale of houses, affordable mortgages, construction, and renovation of for sale and rental housing. In addition, DKP owns or is the general partner of over 3,000 rental units, of which over 87% are affordable to incomes that are 80% or below of area median income (AMI).

DKP (DreamKey Partners, Inc. formerly, Charlotte-Mecklenburg Housing Partnership, Inc.) has been in partnership with the City for over 34 years. Through the continued financial support from the City of Charlotte, DKP is poised to remain the City's premiere partner for the equity access to affordable housing and services that benefit low-to-moderate income beneficiaries.

## Agency Established

1989

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$1,921,000	\$2,091,000	\$170,000

### Affordable Housing

FY 2024 Approved	FY 2025 Request	Difference
\$1,690,000	\$1,860,000	\$170,000

### House Charlotte

FY 2024 Approved	FY 2025 Request	Difference
\$231,000	\$231,000	\$0

## Total Years Financial Partner with City of Charlotte

33 Years

## Population Served

DKP serves predominantly (over 87%) residents who are 80% AMI and below. Only 13% of residents are above 80% AMI, while over 70% of our residents are between 30-60% AMI.

DKP's stabilized rental portfolio consists of over 2,600 units of rental housing. More specifically, over 2,200 of those units are located within the City of Charlotte. Since DKP's inception in 1989, DKP has developed or been the general partner in the creation of another 400 units of affordable housing; however, these 400 are not included in our stabilized portfolio as of 2024.

In 2023, DKP provided education and counseling to over 700 individuals and assisted over 115 individuals with downpayment assistance, specific to the HouseCharlotte program; which we have administered on behalf of the City since 2011.

Since, 2011, DKP has provided education and counseling services to over 12,000 individuals. Since the inception of the HouseCharlotte program, DKP has assisted over 3,300 individuals with access to downpayment assistance, of which 34% served incomes between 31-60% AMI. The average amount downpayment assistance, per individual, exceeds \$7,000, which equates to approximately 3% equity in a \$230,000 home.

## Council Priority Area(s) (Affordable Housing & HouseCharlotte)



### Describe the activities that will be supported through requested city funding

DKP is a nonprofit that develops and maintains neighborhoods composed of for sale and rental homes, with public and private partners. The neighborhoods provide safe, affordable housing for the City's working residents. Affordable housing is defined as housing for households whose income is 80% or less of Area Median Income (AMI). DKP provides three types of services: Homeownership services, Rental housing and Neighborhood Revitalization.

- **Homeownership Services:** Since inception in 1989, DKP has helped create over 5,000 homeowners and has provided homebuyer counseling and/or delinquency prevention services to over 30,000 individuals. DKP operates a Homeownership Center that is a one stop shop and provides full cycle lending. Assistance includes homeownership counseling and training; mortgage origination and first, second and third mortgages; acquisition, construction and sale of homes; and post purchase, foreclosure and delinquency prevention counseling. DKP is a HUD certified counseling agency that is participating in the National Foreclosure Mortgage Program to help families remain in their homes. DKP has been approved by FHA to purchase HUD houses and to provide second mortgages with FHA insured loans. In revitalized areas, DKP can assist customers who make more than 80% of AMI to promote mixed income neighborhoods. DKP has been administering the City's "HouseCharlotte" program since 2011.
- **Rental Housing:** DKP has completed (built, financed or acquired) approximately 3,000 rental units. DKP oversees the management of over 2,500 stabilized rental units that are leased primarily to families whose median household income is below 60% AMI; with some restricted to incomes of below 30% AMI. Of DKP's total stabilized rental portfolio, 14% serve incomes 0-30%, while 87% of our portfolio serves 80% AMI or less. In 2023, DKP was awarded one of two 9% LIHTC projects in Mecklenburg County for the development of a 70-unit multi-family project in Grier Heights, directly adjacent to the City of Charlotte police station on N Wendover Road. Construction is anticipated to begin in 2024. Additionally, this 9% LIHTC project was also allocated City Housing Trust Fund in excess of \$3,000,000.
- **Neighborhood Revitalization:** Since 2016, DKP has constructed over 20 for sale owner occupied single-family homes in the Druid Hills neighborhood, all of which were sold to owners who were eligible for HouseCharlotte downpayment assistance. DKP is in the process of constructing approximately 30 duets in the Druid Hills neighborhood, which also will serve low to moderate income families, who are HouseCharlotte eligible. These homeownership opportunities lay the foundational support for families to build generational wealth, increase economic mobility and independence, and holistically contribute to the revitalization of the neighborhood. Within calendar year 2024, DKP is preparing to continue the neighborhood revitalization efforts already under way in the Grier Heights neighborhood by beginning the initial stages of developing over 25 for-sale townhomes, over 150 units of multi-family rental apartments and approximately 80 units specifically targeted to seniors. When completed, this project will increase the housing stock in Grier Heights by over 280 units, all of which will serve incomes 80% AMI or below.

### FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	Increase housing opportunities for multi-family development	Number of units constructed/acquired/rehabilitated/site control	600
Safe Communities	Removal of slum and blight.	Identify, acquire and demolish properties that contribute to community destabilization.	4

Strategic Priority	Objective	Measures	Target
Safe Communities	Mitigate environmental impediments to development	Identify parcels which are eligible for a Brownfields designation.	4
Great Neighborhoods	Increase the creation and retention utilization of "HouseCharlotte" program funding.	In conjunction with a program approved lender, utilize payment assistance for any combination of loan downpayment, closing costs, repairs to credit, homeownership counseling and/or interest rate buy downs.	150
Great Neighborhoods	Increase housing opportunities for single-family development	Number of homes constructed/site control	50

## FY2025 Equity Measures and Targets

Strategic Priority	Objective	Measures	Target
Safe Communities	Implement recommendations from Community Impact Measure survey conducted in partnership with NeighborWorks	Create a community watch program to reduce crime and vehicle theft in three neighborhoods.	3
Great Neighborhoods	Extend e-bike pilot program in partnership with the City and Wells Fargo.	Create a bike club for community engagement in N End Corridor	1
Safe Communities	Elevate Race, Equity, Diversity and Inclusion (REDI) dialogue.	Create quarterly REDI trainings for staff and board members.	4
Great Neighborhoods	Increase access to fresh produce for seniors.	Implement a monthly senior nutrition program for at 8 DKP apartment communities.	96

## Overall Agency Budget

	Expenditures FY 2023- FY 2025				Percent city request of overall budget
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	
<b>Personnel</b>					
Salaries	\$ 4,467,074	\$ 4,697,038	\$ 5,189,628	\$ 186,000	4%
Merit	\$ -	\$ -	\$ -	\$ -	0%
Benefits	\$ 953,517	\$ 1,017,462	\$ 1,114,094	\$ 45,000	4%
<b>Subtotal Personnel Expenses</b>	<b>\$ 5,420,591</b>	<b>\$ 5,714,500</b>	<b>\$ 6,303,722</b>	<b>\$ 231,000</b>	<b>4%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 1,470,000	\$ 1,470,000	\$ 1,470,000	\$ 1,470,000	100%
Communications (e.g. publishing, marketing)	\$ 272,000	\$ 293,000	\$ 148,000	\$ -	0%
Facilities (e.g. rent, utilities)	\$ 256,230	\$ 246,480	\$ 244,080	\$ -	0%
Office Supplies	\$ 34,500	\$ 26,100	\$ 26,100	\$ -	0%
Travel & Training	\$ 127,400	\$ 128,960	\$ 135,020	\$ -	0%
Technology	\$ 88,200	\$ 88,200	\$ 88,200	\$ -	0%
Other	\$36,538,784	\$20,263,295	\$ 5,271,862	\$ 390,000	7%
<b>Subtotal Operating Expenses</b>	<b>\$38,787,114</b>	<b>\$22,516,035</b>	<b>\$ 7,383,262</b>	<b>\$ 1,860,000</b>	<b>25%</b>
<b>Total Expenditures</b>	<b>\$44,207,705</b>	<b>\$28,230,535</b>	<b>\$ 13,686,984</b>	<b>\$ 2,091,000</b>	<b>15%</b>

	Revenues		
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ 27,768,300	\$ 480,000	\$ 4,944,500
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ 112,500	\$ 122,500	\$ 117,500
Donor Contributions	\$ 75,000	\$ 75,000	\$ -
Service Fees	\$ 4,800,280	\$ 24,909,900	\$ 8,162,855
Other Revenue	\$ 1,413,432	\$ 1,411,304	\$ 2,156,806
<b>Total Revenues</b>	<b>\$ 34,169,512</b>	<b>\$ 26,998,704</b>	<b>\$ 15,381,661</b>

## Overall Program Budget – Affordable Housing

	Expenditures FY 2023- FY 2025				
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 4,121,683	\$ 4,369,160	\$ 4,837,578	\$ -	0.0%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 866,641	\$ 922,312	\$ 1,011,907	\$ -	0.0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 4,988,324.00</b>	<b>\$ 5,291,472.00</b>	<b>\$ 5,849,485.00</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 1,470,000	\$ 1,470,000	\$ 1,470,000	\$ 1,470,000.00	100.0%
Communications (e.g. publishing, marketing)	\$ 272,000	\$ 293,000	\$ 148,000	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 219,630	\$ 209,880	\$ 207,480	\$ -	0.0%
Office Supplies	\$ 30,900	\$ 22,500	\$ 22,500	\$ -	0.0%
Travel & Training	\$ 127,400	\$ 128,960	\$ 135,020	\$ -	0.0%
Technology	\$ 88,200	\$ 88,200	\$ 88,200	\$ -	0.0%
Other	\$ 36,529,244	\$ 20,255,555	\$ 5,264,122	\$ 390,000.00	7.4%
<b>Subtotal Operating Expenses</b>	<b>\$ 38,737,374.00</b>	<b>\$ 22,468,095.00</b>	<b>\$ 7,335,322.00</b>	<b>\$ 1,860,000.00</b>	<b>25.4%</b>
<b>Total Expenditures</b>	<b>\$ 43,725,698.00</b>	<b>\$ 27,759,567.00</b>	<b>\$ 13,184,807.00</b>	<b>\$ 1,860,000.00</b>	<b>14.1%</b>

	Revenues		
	FY2023	FY 2024	FY2025
	Actual	Current Budget	Projected Budget
Government Grants & Funding - Federal/State	\$ 27,768,300	\$ 480,000	\$ 4,944,500
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ 112,500	\$ 122,500	\$ 117,500
Donor Contributions	\$ 75,000	\$ 75,000	\$ -
Service Fees	\$ 4,800,280	\$ 24,909,900	\$ 8,162,855
Other Revenue	\$ 1,413,432	\$ 1,411,304	\$ 2,156,806
<b>Total Revenues</b>	<b>\$ 34,169,512</b>	<b>\$ 26,998,704</b>	<b>\$ 15,381,661</b>

## Overall Program Budget – House Charlotte

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$345,391.00	\$327,878.00	\$ 352,050.00	\$ 186,000.00	53%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 86,876.00	\$ 95,150.00	\$ 102,187.00	\$ 45,000.00	44.0%
<b>Subtotal Personnel Expenses</b>	<b>\$432,267.00</b>	<b>\$423,028.00</b>	<b>\$ 454,237.00</b>	<b>\$ 231,000.00</b>	<b>51.0%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ -	\$ -	\$ -	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ -	\$ -	\$ -	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 36,600.00	\$ 36,600.00	\$ 36,600.00	\$ -	0.0%
Office Supplies	\$ 3,600.00	\$ 3,600.00	\$ 3,600.00	\$ -	0.0%
Travel & Training	\$ -	\$ -	\$ -	\$ -	0.0%
Technology	\$ -	\$ -	\$ -	\$ -	0.0%
Other	\$ 9,540.00	\$ 7,740.00	\$ 7,740.00	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 49,740.00</b>	<b>\$ 47,940.00</b>	<b>\$ 47,940.00</b>	<b>\$ -</b>	<b>0.0%</b>
<b>Total Expenditures</b>	<b>\$482,007.00</b>	<b>\$470,968.00</b>	<b>\$ 502,177.00</b>	<b>\$ 231,000.00</b>	<b>46.0%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ -	\$ -	\$ -
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$ -	\$ -	\$ -
Donor Contributions	\$ -	\$ -	\$ -
Service Fees	\$ -	\$ -	\$ -
Other Revenue	\$ -	\$ -	\$ -
<b>Total Revenues</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

### 2024 Dream Key Partners - Board of Directors

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## FY 2025 Financial Partner

### Agency Summary Agency Name: **Local Initiatives Support Corporation** (Charlotte Office)

#### Agency Description

Your funding support of LISC Charlotte ensures that LISC's comprehensive community development model can continue to advance the City's affordable housing and economic mobility agenda for the benefit of Charlotte's residents.

Utilizing national best practices to advance our collaborative work, LISC Charlotte executes a comprehensive approach to economic and community development. We drive change by deploying different forms of capital in conjunction with the capital of stakeholders to work through our embedded local relationships to align capital, capacity, and neighborhood visions. This includes developing and building the capacity of local community-based nonprofits that serve minority communities. Our comprehensive strategy also encompasses health, safety, small business, and recreation initiatives as well as our role as fund manager for the \$53MM Charlotte Housing Opportunity Investment Fund I (CHOIF I) that invested directly into affordable housing for low to moderate income individuals. With the City's and other funders' support, we can launch CHOIF II to do the same.

Charlotte has benefitted from LISC's local investment and from our 45 years of success and expertise in helping neighbors make their communities thriving places to live and work. For example, the City's initial 2019 seed investment in LISC Charlotte (\$200k/year for three years) leveraged \$60MM dollars (not including CHOIF I nor technical assistance) brought to the Charlotte market in a very short period.

Since opening our doors in March 2019, LISC Charlotte's projects and accomplishments continue to grow in benefit to residents thanks to the City's and other funders' support:

- \* We successfully launched the \$53MM CHOIF I that has resulted in 1595 new and preserved units of affordable housing surpassing the original goal of 1500 units.
- \* We are fundraising another \$40MM to continue the partnership with the City's Housing Trust Fund through CHOIF II. We have so far successfully raised \$12MM towards our goal with another \$10M in progress.
- \* We stepped in during a crucial time to act as construction lender for Laurel Street's Varick on 7th affordable housing apartments. LISC provided a \$17MM loan to the project; capital that was separate and apart from CHOIF I.
- \* We successfully deployed \$790,000 (K) in City of Charlotte HUD CDBG funding for micro-enterprises in the pandemic resulting in 79 businesses receiving grant funding with another \$3.17MM using private grant dollars to fund over 142 businesses. LISC designed the small business CDBG program that can be used for future small business initiatives. Most of the small businesses funded and still receiving technical assistance from us are in the Historic West End and the East side of Charlotte. We also provided a lending webinar to businesses in the last quarter of 2022.
- \* Secured a \$20MM Fifth Third Bank Neighborhood Investment Program award for LISC Charlotte's target neighborhood, the Historic West End (HWE), a three-year initiative that focused on neighborhood revitalization, small business, and homeownership initiatives in partnership with key stakeholders. Because of our success, Fifth Third Bank is extending its commitment for another year.
- \* Secured a \$200K from Lowe's for a lot beautification project in the HWE. The lot became a community gathering space for residents. In addition, funds will be used to partner with the City's Small Business Facade Improvement Program by providing a portion of the required match to small businesses such that their projects can be completed in a timely manner.
- \* As part of a \$25K commitment to Historic West End Partners (HWEP), LISC provided Capacity Mapping modules to HWEP members resulting in execution of a strategic plan and an accountant hired for financial oversight. We continue to work with HWEP to expand their initiatives. As part of the Fifth Third Bank Empowering Black Futures

Initiative, LISC Charlotte is now working with For The Struggle and West Side Community Land Trust by providing funding and technical assistance to build their capacity.

\* LISC Charlotte completed the Small Business Displacement Roundtable discussion with a report shared with the City of Charlotte staff. Target neighborhood businesses participated in the roundtable discussion.

\* Secured a \$625K grant from Ally Bank to support a three-year partnership with local housing authority INLIVIAN to expand their Destination Homeownership Program for residents who want to own a home. This program ended December 2023, and we are in conversations with INLIVIAN about how to continue to expand their capacity.

\* Acting as a convener and promoter of conversations and solutions at the neighborhood level, we implemented the 30-member Historic West End Stakeholder Group to encourage community residents, business owners, churches, and other stakeholders to discuss and share ongoing projects, community initiatives, etc. Members include Johnson C. Smith University, City of Charlotte, Mecklenburg County, Atrium Health, Self Help Credit Union, Charlotte Police Department, HWEF, Queen City Metro, Knight Foundation, Neighboring Concepts, etc.

\* LISC Charlotte partnered with the City of Charlotte and Knight Foundation to act as an intermediary for funding provided to two minority developers with projects on the Historic West End and Beatties Ford Road Corridor. Both projects closed in September 2021. We continue to monitor the projects to ensure completion and success as well as serve as an advisor to both developers.

\* Through funding received from Fannie Mae, we worked with Atrium Health staff to research the correlation between housing and Social Determinants of Health. We worked with Atrium Health staff to add City and CHOIF affordable housing funded complexes into their database for use by Atrium staff and social workers.

\* We provided a space for the Charlotte Area Transit System to present their findings and plans to the HWE Stakeholder Group. We ensure residents receive notice and information about local transportation efforts. We are also assisting the City with community driven education about the 2040 Comprehensive Plan and community benefit agreements.

\* LISC Charlotte continues to provide capital, funding, technical assistance, and capacity building services to grassroots organizations dedicated to preserving and promoting residential, economic, and community development in the HWE as well as historic preservation of the neighborhood's heritage.

\* We are pleased to announce that with grant funding from several sources pursued over the past six month, LISC Charlotte is launching its first Financial Opportunity Center (FOC) in the City to benefit low to moderate income residents.

## Agency Established

2019 - Local office established

## Agency Funding Request

FY2024 Approved	FY 2025 Request	Difference
\$200,000	\$200,000	\$0

## Total Years Financial Partner with City of Charlotte

4 Years

## Population Served

LISC envisions a USA in which all people have access to economic and social opportunities and share in the prosperity of the nation. In pursuit of this vision, we listen and engage communities where we work; search for, develop, and engage in innovative organizing and equity-building strategies; and thoughtfully and systematically implement community/economic development work with a racial equity lens.

LISC aspires to increase participation of Black, Indigenous, Latinx, and other people of color in the decision-making and works with partners that reflect the communities where we work. We amplify the voices of those most

impacted by inequities and include them in the creation and implementation of programs and initiatives.

LISC Charlotte will serve all residents of the City of Charlotte with an emphasis on our target neighborhood, Historic West End, which is 65.95% African American. Per the City's Quality of Life report and other research, those living in the HWE have a life expectancy of 68 years compared to 72 years countywide. Approximately 34.4% of this population receives food and nutrition services compared to 14.9% countywide, and only 18% of residents live within a half mile of a full-service grocery store. Also, 26.58% of households make less than \$25,000 in income annually compared to 13.62% countywide. In terms of education, the HWE population lags the rest of Mecklenburg County. The percentage of adults age 25+ with a bachelor's degree or higher in the HWE is 26.5%, while countywide it's 45%. Only 21.5% of students in grades 3-5 are proficient in end-of-grade testing, while countywide the rate is 48.1%.

In the past, there was a need to change the negative image often associated with the HWE, which made it difficult to retain existing employees and attract new jobs. Despite these and the other challenges that have affected black residents born and raised within the community, the HWE's Beatties Ford Road Corridor has been identified by the City as a Corridor of Opportunity. In addition, roughly 67.19% of residents in the corridor are of working age. Approximately 99.9% live within half a mile of a transit stop compared to 68.5% countywide, and 65% live within half a mile of a bank or credit union, a financial concentration double that of the county at 33.3%.

### Council Priority Area(s)



### Describe the activities that will be supported through requested city funding

- 1) Continue to partner with the City of Charlotte's Housing Trust Fund RFP through acting as fund manager for the Charlotte Housing Opportunity Investment Fund II (CHOIF II). Offer expertise to the City on process improvements for developers as well as innovative approaches to expanding the housing program.
- 2) Oversee funding provided by the City to two economic development projects located along the Beatties Ford Road corridor. Other projects may be added to the LISC pipeline as the City deems fit.
- 3) Provide lending and technical assistance services to local small businesses including providing direct referral to LISC funded Business Development Organizations for one-on-one technical assistance.
- 4) Continue to raise dollars to support the HWE Minority Developer Fund in partnership with Knight Foundation.
- 5) Partner with the City's Façade Improvement Program to allow businesses an opportunity to complete storefront projects.
- 6) Continue to act as a convener and connector regarding transportation and safety initiatives.
- 7) Support grassroots organizations through funding, capacity building, and technical assistance particularly continuing to support grassroots housing organizations.
- 8) Execute strategy for Fifth Third Bank's Empowering Black Futures Program in partnership with Historic West End grassroots community organizations.
- 9) Open a LISC Financial Opportunity Center in partnership with a local non-profit organization that would like to provide such services.
- 10) Provide peer to peer learning and other community education to residents as a convener and connector to ensure residents are aware of best practices from across the country.
- 11) Continue to fund and provide technical assistance to local Business Development Organizations (BDO) who provides education and training to local small businesses.
- 12) Continue to act as an Advisor to the City as it relates to Corridors of Opportunity strategy and implementation.

## FY2025 Performance Measures and Targets

Strategic Priority	Objective	Measures	Target
Workforce & Business Development	<p>Continue to support small businesses and developers in improving and/or expanding operations and increasing their prospects for improved economic mobility through capital and/or technical assistance that includes access to our suite of Small Business Lending options.</p> <p>Continue to Partner with the City's Facade Improvement Program.</p> <p>Continue to act as an advisor to grassroots organization, Historic West End Partners.</p> <p>Launch the LISC Financial Opportunity Center (FOC) to advance family financial stability by providing residents with employment coaching, including job placement, retention, and skill improvement, financial coaching and education, and connection to income supports.</p>	<p>Outside funding is leveraged with the City's support to benefit the Charlotte market.</p> <p>SBA, New Markets Tax Credits, and other programs are leveraged, attracting investment with flexible financing options for small businesses and developers.</p> <p>There is noticeable positive change in the business climate along Beatties Ford Road Corridor that will serve as a platform for other private investors to support work along the corridor.</p> <p>LISC Charlotte's first FOC opens in the City of Charlotte.</p>	<p>At least \$1M in outside funding is leveraged with the City's support to benefit the Charlotte market. 200 of small businesses receiving technical assistance and/or working capital loans through LISC Charlotte. 4 Business Development Organizations: Aspire Community Capital, The Women's Business Center of Charlotte, Charlotte is Creative and CLIMB receive capacity building funding and technical assistance from LISC Charlotte. The new Financial Opportunity Center serves up to 25 Charlotte residents in the first year of operation.</p>
Transportation & Planning	<p>Continue to serve as a convenor of and promoter for the City's transportation services and initiatives.</p>	<p>Assist the City with community driven education about the 2040 Comprehensive Plan and community benefit agreements.</p> <p>Continue to provide a space for and facilitate the Charlotte Area Transit System presenting its findings and plans to the HWE Stakeholder Group.</p>	<p>1000 residents and stakeholders receiving appropriate notice and information regarding local transportation efforts.</p>
Safe Communities	<p>Scale up safety efforts in the Historic West End neighborhood for community development, with a focus on the Beatties Ford/LaSalle Corridor.</p> <p>Continue building community ties at a grassroots level to establish a common ground around safety and assist the community in identifying their safety priorities.</p> <p>Continue providing capacity building to locally active grassroots groups so they can focus on systematic issues and root causes to improve the safety and wellbeing of vulnerable and at-risk people in our neighborhoods.</p>	<p>Through community partnerships, LISC's best practices for safety initiatives are implemented for another year, like the Neighborhood Blitz.</p> <p>The City's Cure Violence Initiative and other violence interruption programs are promoted in the Historic West End (HWE) through direct contact with the City, Cure Violence, partners, and community staff as well as adding safety to the community conversation during HWE Stakeholder groups to ensure all are aware of the City's safety efforts.</p>	<p>Neighborhood physical improvements as overseen by local partners are implemented that build connections among residents and stakeholders and improve community safety towards furthering neighborhood revitalization.</p>

Strategic Priority	Objective	Measures	Target
Great Neighborhoods	<p>Continue to partner with the City's Housing Trust Fund to leverage dollars for affordable housing development through the launch of CHOIF II.</p> <p>Continue to provide financial support and ongoing technical assistance in support of the West Side Community Land Trust (WSCLT) and Historic Nathaniel Carr (HNC). Such initiative is focused on building safe and affordable housing within the corridor by providing capital in the form of philanthropic support as well as tax credits.</p> <p>Continue to work with the City to structure an acquisition rehabilitation program focused on full time affordable housing developers.</p> <p>Continue to identify minority developers engaged in for-sale affordable housing.</p> <p>Continue to serve as an advisor to local developers and/or non-profit organizations who provide housing services.</p> <p>Through HUD Section 4 funding, continue to provide funding and technical assistance to housing providers and work with housing organizations over the next several years.</p> <p>For The Struggle continues its work to provide home repair services to seniors.</p>	<p>\$20MM in support of CHOIF II to build affordable housing in Charlotte.</p> <p>Under the initiative, to date, LISC has provided over \$1.2MM to WSCLT and over \$150K in operating support to WSCLT and Historic Nathaniel Carr, an affordable housing complex.</p> <p>Both organizations along with Historic West End Partners receive additional dollars from LISC Charlotte this year.</p>	<p>West Side Community Land Trust, For the Struggle and Historic West End Partners supported via technical assistance and funding through the Fifth Third Bank initiative. 2 housing providers: Supportive Housing Communities and Lotus Campaign receive LISC funding and technical assistance.</p>
Well-managed Government	<p>Continue to participate in initiatives with stakeholder organizations to coordinate and collaborate on all active funding initiatives regarding economic and community development, revitalization, and economic mobility to advocate for the objectives noted above.</p> <p>Continue with LISC designed program for the City to provide financing to projects without the City focusing its efforts on offering lending services. LISC will continue to oversee the City and Knight's investment into these</p>	<p>Through convening, direct engagement, and leadership training, LISC Charlotte will work with community leaders, non-profit sector members, the corporate community, and the philanthropic community to continually identify, evaluate, and provide best practices for programs and initiative to assist the City in maintaining focus for its services that reflect thoughtful financial stewardship, accountability, and are community-focused, and inclusive.</p>	<p>Minority developer projects near or come to fruition along the Beatties Ford Road Corridor. Uplift the Emerging Developer Training Program and Fund with emphasis placed on educating new developers who are being funded by the City. Developer projects funded by the City continue to be successful and offer vital</p>

Strategic Priority	Objective	Measures	Target
	<p>projects, therefore, our efforts are long term.</p> <p>Continue to assist the City with community driven education surrounding the 2040 Comprehensive Plan, community benefit agreements, etc.</p> <p>Continue to engage our internal field office network, our LISC National support team, and LISC’s network of subject matter experts as a valuable resource in assuring that best practices for government leadership are identified and included in all relevant initiatives and program engagement within the City of Charlotte.</p>		<p>goods and services to the community.</p>

**FY2025 Equity Measures and Targets**

Strategic Priority	Objective	Measures	Target
<p>Workforce &amp; Business Development</p>	<p>LISC National has existing OneLISC Affinity Groups that are employee-led spaces for colleagues with shared identities and a shared purpose to connect and collaborate within a supportive network of peers. Example Affinity Groups include: Asian American and Pacific Islander Affinity Group (AAPI), Black/African American Group (BAAG), LGBTQ+ Affinity Group, Jewish Affinity Group, etc.</p>	<p>Number of DEIJ trainings offered for staff.</p> <p>Staff participation in OneLISC Affinity Groups.</p> <p>Onboarding of HBCU interns.</p> <p>Training and professional development provided to HBCU interns.</p> <p>2024 DEIJ training provided by DEIJ expert including how to view DEIJ via the 2024 Workplan and 3-Year Strategic Plan.</p>	<p>All 6 LISC Charlotte staff to participate in DEIJ trainings.</p> <p>Continue to support minimum of one HBCU intern per semester.</p> <p>Provide 3 professional development trainings to HBCU interns.</p> <p>2024 Workplan and 3-Year Strategic Plan has been properly vetted from a DEIJ standpoint for each priority area.</p>
<p>Workforce &amp; Business Development</p>	<p>LISC Charlotte’s target neighborhood is Historic West End, a predominantly black neighborhood on the West Side full of history and culture and home to Johnson C. Smith University. Most of our programming is geared toward uplifting the HWE residents.</p>	<p>Number of BIPOC small businesses assisted via technical assistance and/or funding to remain or relocate to the corridor.</p> <p>Number of grassroots community organizations assisted that cater or provide services to the corridor.</p>	<p>Number via partnership with Business Development Organizations and through Empowering Black Futures initiative.</p> <p>Target: 200 small businesses and three grassroots organizations.</p>

## Overall Agency Budget

Expenditures FY 2023- FY 2025					
	FY 2023 ACTUAL	FY 2024 BUDGET	FY 2025 PROJECTED BUDGET	FY 2025 CITY REQUEST	Percent city request of overall budget
<b>Personnel</b>					
Salaries	\$ 496,676	\$ 746,392	\$ 783,711	\$ 117,000	14.9%
Merit	\$ -	\$ -	\$ -	\$ -	0.0%
Benefits	\$ 268,171	\$ 403,051	\$ 423,204	\$ 63,000	14.9%
<b>Subtotal Personnel Expenses</b>	<b>\$ 764,846</b>	<b>\$ 1,149,443</b>	<b>\$ 1,206,915</b>	<b>\$ 180,000</b>	<b>14.9%</b>
<b>Operating</b>					
Capital Equipment (e.g. vehicles, computers)	\$ 9,256	\$ 10,836	\$ 11,378	\$ -	0.0%
Communications (e.g. publishing, marketing)	\$ -	\$ -	\$ -	\$ -	0.0%
Facilities (e.g. rent, utilities)	\$ 65,599	\$ 69,406	\$ 72,876	\$ 20,000	27.4%
Office Supplies	\$ 3,778	\$ 4,040	\$ 4,242	\$ -	0.0%
Travel & Training	\$ 12,566	\$ 9,759	\$ 10,246	\$ -	0.0%
Technology	\$ 12,371	\$ 12,603	\$ 13,233	\$ -	0.0%
National Indirect Expenses	\$ 30,450	\$ 12,474	\$ 13,097	\$ -	0.0%
<b>Subtotal Operating Expenses</b>	<b>\$ 134,020</b>	<b>\$ 119,118</b>	<b>\$ 125,074</b>	<b>\$ 20,000</b>	<b>16.0%</b>
<b>Total Expenditures</b>	<b>\$ 898,866</b>	<b>\$ 1,268,561</b>	<b>\$ 1,331,989</b>	<b>\$ 200,000</b>	<b>15.0%</b>

Revenues			
	FY2023 Actual	FY 2024 Current Budget	FY2025 Projected Budget
Government Grants & Funding - Federal/State	\$ 382,544	\$ 930,000	\$ 976,500
Mecklenburg County Funding	\$ -	\$ -	\$ -
Foundation Grants & Funding	\$3,557,584	\$ 1,615,000	\$ 1,695,750
Donor Contributions	\$ -	\$ -	\$ -
Service Fees	\$ 180,000	\$ 280,000	\$ 294,000
Other Revenue	\$ -	\$ -	\$ -
<b>Total Revenues</b>	<b>\$4,120,128</b>	<b>\$ 2,825,000</b>	<b>\$ 2,966,250</b>

**LOCAL INITIATIVES SUPPORT CORPORATION (LISC)  
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**New York, NY (2018 – Current)**

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*Senior Managing Director*  
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*President & CEO*  
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**Rey Ramsey (Co-Chair-Governance Comm.)**

*CEO & Managing Partner*  
**Centri Capital  
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