



FY 2027

Financial Partner Application Packet



The agency descriptions, budgets, program activities and sustainability plans contained in this document are included as provided by the requesting agencies in their FY 2027 Financial Partner application.

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Application Score Card

Organization Name	FY 2027 Funding Request	Requesting funding for	Strategic Priority Area	Weighted Score
Alliance Center for Education	\$155,000	Program Budget	Great Neighborhoods	90.2
Charlotte Center for the Arts	\$140,450	Overall Agency Budget	Great Neighborhoods	68.1
Crisis Assistance Ministry	\$515,000	Program Budget	Great Neighborhoods	95.2
DreamKey Partners, Inc.	\$250,000	Overall Agency Budget	Great Neighborhoods	94.4
Groundwater Solutions	\$99,832	Overall Agency Budget	Great Neighborhoods	65.3
Hearts for the Invisible Charlotte Coalition Inc	\$350,000	Overall Agency Budget	Great Neighborhoods	93.4
Housing Collaborative	\$200,000	Overall Agency Budget	Great Neighborhoods	95.2
Just Do It Movement! Inc.	\$58,000	Program Budget	Great Neighborhoods	68
Roof Above	\$127,182	Program Budget	Great Neighborhoods	100
Supportive Housing Communities	\$1,000,000	Overall Agency Budget	Great Neighborhoods	90.2
The Frankie Mae Foundation	\$29,860	Program Budget	Great Neighborhoods	81.8
Carolinas Metro Inc. (dba Carolinas Metro Reds)	\$50,000	Overall Agency Budget	Safe Communities	74.8
For The Struggle, Inc.	\$150,000	Overall Agency Budget	Safe Communities	82
My Brother's Keeper Charlotte-Mecklenburg	\$115,000	Overall Agency Budget	Safe Communities	73
ParentChild+	\$190,000	Program Budget	Safe Communities	96.5
Safe Alliance, Inc.	\$438,000	Program Budget	Safe Communities	91
The Co-Parenting Hub	\$150,000	Program Budget	Safe Communities	54.6
The Knothole Foundation Inc.	\$75,000	Program Budget	Safe Communities	77.8
Sustain Charlotte	\$100,000	Program Budget	Transportation and Planning	93
The NEO Foundation Inc	\$50,000	Overall Agency Budget	Transportation and Planning	70.4
Basil Business Group	\$6,000	Program Budget	Workforce and Business Development	80.4

Organization Name	FY 2027 Funding Request	Requesting funding for	Strategic Priority Area	Weighted Score
Cappa Inc.	\$45,000	Program Budget	Workforce and Business Development	65.5
Carolina Youth Coalition	\$125,000	Overall Agency Budget	Workforce and Business Development	97.6
Carolinas Asian American Chamber of Commerce	\$100,000	Program Budget	Workforce and Business Development	48.8
Community Culinary School of Charlotte	\$38,830	Program Budget	Workforce and Business Development	96.5
Directions To Discovery Inc.	\$15,000	Overall Agency Budget	Workforce and Business Development	82.3
Dress for Success Charlotte	\$298,027	Program Budget	Workforce and Business Development	90.9
Freedom Communities	\$80,000	Program Budget	Workforce and Business Development	91.6
National Black MBA of Charlotte	\$45,000	Program Budget	Workforce and Business Development	90
National Institute of Minority Economic Development - Women's Business Center of Charlotte	\$50,000	Program Budget	Workforce and Business Development	78.4
Our Daily Bread Foundation	\$90,000	Overall Agency Budget	Workforce and Business Development	94
Per Scholas, Inc.	\$120,000	Program Budget	Workforce and Business Development	96.5
Power UP USA	\$100,000	Overall Agency Budget	Workforce and Business Development	53.6
Prospera North Carolina LLC	\$50,000	Overall Agency Budget	Workforce and Business Development	94
Springclean, Inc.	\$72,000	Program Budget	Workforce and Business Development	90.9

Organization Name	FY 2027 Funding Request	Requesting funding for	Strategic Priority Area	Weighted Score
Sullenberger Aviation Museum	\$248,000	Program Budget	Workforce and Business Development	90.9
The Boost Pad	\$103,500	Overall Agency Budget	Workforce and Business Development	72.4
United Way of Greater Charlotte	\$220,000	Program Budget	Workforce and Business Development	95.1
Young Black Leadership Alliance	\$150,000	Overall Agency Budget	Workforce and Business Development	91.6
Total Requested	\$6,199,681			

Score Card Notes:

- Agencies in “**bold**” are current financial partners
- Weighted Scores
 - Current partners
 - 60% - Application Score
 - 20% - Policy Adherence
 - 15% - Completeness of application package
 - 5% - Mid-year reporting submitted
 - New partners
 - 70% - Application Score
 - 20% - Policy Adherence
 - 10% - Completeness of application package

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EXECUTIVE SUMMARY OF APPLICATIONS

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GREAT NEIGHBORHOODS

Alliance Center for Education

Strategic Area: Great Neighborhoods

Funding Request: \$155,000

Planned Activities: Personnel salaries and benefits for program staff

- Out-of-school time academic programming
- Two-generation family support model
- Youth enrichment and structured learning
- Direct student services and family engagement

Charlotte Center for the Arts

Strategic Area: Great Neighborhoods

Funding Request: \$140,450

Planned Activities: Charlotte Center for the Arts will activate underutilized spaces in South Charlotte by renting venues and partnering with local arts organizations to expand access to performances, exhibitions, master classes, rehearsals, and cultural programming. Funding will support a contracted program coordinator to secure venues and manage partnerships, as well as marketing, insurance, equipment rental, program supplies, and essential operational infrastructure.

Crisis Assistance Ministry

Strategic Area: Great Neighborhoods

Funding Request: \$515,000

Planned Activities: While City dollars fund direct aid only, recipients are also connected to budget counseling, financial coaching, donated clothing and household goods, resource referrals. The agency also provides assessment and case processing, personalized assessment of financial need, resource verification, payment coordination, and income gap analysis.

Funding supports: Direct Financial Assistance - \$310,000 – Emergency Rental Assistance, \$205,000 – Utility Assistance

DreamKey Partners, Inc.

Strategic Area: Great Neighborhoods

Funding Request: \$250,000 – Overall Agency Budget

Planned Activities: Support full lifecycle affordable housing development including financing, construction oversight, stabilization, compliance, and long-term affordability stewardship.

Groundwater Solutions

Strategic Area: Great Neighborhoods

Funding Request: \$99,832 – Overall Agency Budget

Planned Activities: Provide transitional housing services for families and returning citizens, including emergency housing and case management.

Hearts for the Invisible Charlotte Coalition

Strategic Area: Great Neighborhoods

Funding Request: \$350,000 – Overall Agency Budget

Planned Activities: Expand homelessness outreach through culturally competent street engagement and organizational capacity building.

Housing Collaborative

Strategic Area: Great Neighborhoods

Funding Request: \$200,000 – Overall Agency Budget

Planned Activities: Provide housing navigation and placement services to help low-income households secure stable housing.

Just Do It Movement! Inc.

Strategic Area: Great Neighborhoods

Funding Request: \$58,000 – Program Budget

Planned Activities: Deliver housing readiness and wraparound services including ID recovery and case management.

Roof Above

Strategic Area: Great Neighborhoods

Funding Request: \$127,182 – Program Budget

Planned Activities: Operate a Day Services Center providing meals, hygiene services, mail access, and support for unsheltered residents.

Supportive Housing Communities

Strategic Area: Great Neighborhoods

Funding Request: \$1,000,000 – Overall Agency Budget

Planned Activities: Provide permanent supportive housing, case management, and life skills services for individuals experiencing homelessness.

The Frankie Mae Foundation

Strategic Area: Great Neighborhoods

Funding Request: \$29,860 – Program Budget

Planned Activities: Expand caregiver support through community-building and engagement activities.

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SAFE COMMUNITIES

Carolinas Metro Inc. (dba Carolinas Metro Reds)

Strategic Area: Safe Communities

Funding Request: \$50,000 – Overall Agency Budget

Planned Activities: Provide affordable, high-quality baseball programming for underserved youth ages 4–18, with a focus on West Charlotte. Programming combines competitive play with academic support, reading literacy, college preparation, mentorship, and life skills development. Funding will primarily support coaching, tutoring, and operational roles to strengthen program delivery, reduce reliance on volunteers, and expand positive youth engagement on and off the field.

For The Struggle, Inc.

Strategic Area: Safe Communities

Request: \$150,000 – Overall Agency Budget

Planned Activities: Provide senior-focused services including estate planning assistance, property tax relief support, home repairs/ADA modifications, legal access, and meal services to promote stability and safety.

My Brother's Keeper Charlotte-Mecklenburg

Strategic Area: Safe Communities

Request: \$115,000 – Overall Agency Budget

Planned Activities:

Provide career-readiness and experiential learning opportunities for young men of color, including mentorship, workforce exposure, and professional skill-building.

ParentChild+

Strategic Area: Safe Communities

Request: \$190,000 – Program Budget

Planned Activities: Support early childhood education services including staff salaries, site coordination, and direct home-based early learning support.

Safe Alliance, Inc.

Strategic Area: Safe Communities

Request: \$438,000 – Program Budget

Planned Activities: Provide domestic violence victim support services including shelter, advocacy, crisis intervention, and survivor stabilization programs.

The Co-Parenting Hub

Strategic Area: Safe Communities

Request: \$150,000 – Program Budget

Planned Activities: Provide supervised child exchange services, structured co-parenting support, and conflict-reduction programming to promote child safety.

The Knothole Foundation Inc.

Strategic Area: Safe Communities

Request: \$75,000 – Program Budget

Planned Activities: Provide sports-based youth development programming for girls to promote academic success, confidence, safety, and long-term mobility.

TRANSPORTATION AND PLANNING

Sustain Charlotte

Strategic Area: Transportation & Planning

Request: \$100,000 – Program Budget

Planned Activities: Conduct community engagement and planning advocacy in Corridors of Opportunity and Strategic Investment Areas focused on transportation safety and equitable development.

The NEO Foundation Inc

Strategic Area: Transportation & Planning

Request: \$50,000 – Overall Agency Budget

Planned Activities:

Deploy community engagement and systems analysis strategies to gather resident input and inform equitable policy and planning decisions.

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WORKFORCE AND BUSINESS DEVELOPMENT

Basil Business Group

Strategic Area: Workforce & Business Development

Request: \$6,000 – Program Budget

Planned Activities: Direct program costs to remove participation barriers and provide skills training; including, instructor stipends, childcare stipends for participants, training materials, workforce readiness programming for mothers and caregivers.

Cappa Inc.

Strategic Area: Workforce & Business Development

Request: \$45,000 – Program Budget

Planned Activities: Direct program delivery and workforce development services; including, workforce training programming, employment readiness services, program implementation staffing, and support for economically vulnerable residents.

Carolina Youth Coalition

Strategic Area: Workforce & Business Development

Request: \$125,000 – Overall Agency Budget

Planned Activities: Provide multi-year college access and success programming for high-achieving, under-resourced students, including college counseling, test prep, tutoring, mentorship, career exploration, case management, and career coaching. The program supports students from high school through college graduation, helping them earn degrees with minimal debt and enter the workforce prepared for sustainable careers.

Carolinas Asian American Chamber of Commerce

Strategic Area: Workforce & Business Development

Request: \$100,000 – Program Budget

Planned Activities: Expand workforce development initiatives supporting Asian-owned businesses and under-served young adults pursuing skilled trades. Funding will provide trade career alignment services and launch a pilot soft-skills leadership program for Asian professionals, strengthening economic mobility, leadership representation, and small business growth in Charlotte's Asian-American community.

Community Culinary School of Charlotte

Strategic Area: Workforce & Business Development

Request: \$38,830 – Program Budget

Planned Activities: Provide a 14-week workforce development training program for adults facing significant barriers to employment, combining culinary arts instruction with job-readiness training, life skills coaching, and wraparound support services. City funding will support core program costs including chef instruction, classroom materials, uniforms, food and kitchen supplies, ServSafe certification, and transportation assistance. The program prepares participants for stable employment in Charlotte’s hospitality industry, promoting economic mobility and long-term self-sufficiency.

Directions To Discovery Inc.

Strategic Area: Workforce & Business Development

Request: \$15,000 – Overall Agency Budget

Planned Activities: Provide life skills training, academic support, social development, and vocational readiness programming for young adults with autism and developmental differences. Services include job readiness, career exploration, community integration, and individualized coaching to support successful transition to independent adulthood and workforce participation.

Dress for Success Charlotte

Strategic Area: Workforce & Business Development

Request: \$298,027 – Program Budget

Planned Activities: Launch Workforce Beyond Barriers, a workforce initiative serving 500 underserved women over two years through job-skilling pathways, employer hiring partnerships, career coaching, certification training, and wraparound supports. Funding will support dedicated staff, talent pipeline development, employer engagement, and barrier-reduction assistance to increase access to living-wage careers.

Freedom Communities

Strategic Area: Workforce & Business Development

Request: \$80,000 – Program Budget

Planned Activities: Support the Freedom Business Collective, a small business incubator providing affordable workspace, business education, mentoring, and networking for West Charlotte entrepreneurs. Funding will strengthen program structure, expand individualized coaching, and increase access to growth-stage resources for underrepresented business owners.

National Black MBA Association – Charlotte Chapter

Strategic Area: Workforce & Business Development

Request: \$45,000 – Program Budget

Planned Activities: Deliver technology-focused workforce programming in AI, data analytics, and digital skills; host employer engagement and career readiness events; and integrate health and

wellness education to strengthen workforce participation. Initiatives expand access to high-growth careers and support economic mobility for African American professionals.

National Institute of Minority Economic Development – Women’s Business Center of Charlotte

Strategic Area: Workforce & Business Development

Request: \$50,000 – Program Budget

Planned Activities: Provide tiered business education, technical assistance, and capital-readiness support for start-up, emerging, and growth-stage entrepreneurs. Services include cohort-based training, 1:1 counseling, technology adoption support, and supplier inclusion preparation to strengthen small business growth and economic opportunity.

Our Daily Bread Foundation

Strategic Area: Workforce & Business Development

Request: \$90,000 – Overall Agency Budget

Planned Activities: Deliver workforce readiness programming for underserved youth through structured bread baking, mentoring, financial literacy, and ServSafe certification training. Funding will support staffing and program expansion, increasing youth participation while reinforcing job skills, accountability, and community engagement.

Per Scholas, Inc.

Strategic Area: Workforce & Business Development

Request: \$120,000 – Program Budget

Planned Activities: Provide technical skills training and professional development to prepare participants for high-demand technology careers.

Power UP USA

Strategic Area: Workforce & Business Development

Request: \$100,000 – Overall Agency Budget

Planned Activities: Expand digital literacy training, workforce readiness, and small business support services to strengthen economic participation.

Prospera North Carolina LLC

Strategic Area: Workforce & Business Development

Request: \$50,000 – Overall Agency Budget

Planned Activities: Continue small business development and on-site corridor-based entrepreneurship support, particularly in underserved areas.

Springclean, Inc.

Strategic Area: Workforce & Business Development

Request: \$72,000 – Program Budget

Planned Activities: Expand circular economy workforce programming through youth fashion and textile upcycling initiatives that provide hands-on job training, paid internships, and entrepreneurship exposure. Funding will support CircleUp Youth programming, boutique-based workforce learning at Camp North End, and paid training opportunities that build employability skills while advancing sustainability and small business development in Charlotte’s Corridors of Opportunity.

Sullenberger Aviation Museum

Strategic Area: Workforce & Business Development

Request: \$248,000 – Program Budget

Planned Activities: Expand the Flight Forward program to additional CMS high schools, providing monthly aviation-focused field experiences, STEM and career-readiness instruction, paid summer internships, and cohort-based scholarships. Funding will support student transportation, program materials, and staffing to increase access to high-wage aviation and aerospace career pathways for underserved youth.

The Boost Pad

Strategic Area: Workforce & Business Development

Request: \$103,500 – Overall Agency Budget

Planned Activities: Operate two 14-week accelerator cohorts for early-stage entrepreneurs including workshops, coaching, mentorship, and business development training.

United Way of Greater Charlotte

Strategic Area: Workforce & Business Development

Request: \$220,000 – Program Budget

Planned Activities: Fund Success Coach positions embedded in neighborhood-based organizations to provide resident support, workforce navigation, and coordinated services in historically disinvested communities.

Young Black Leadership Alliance

Strategic Area: Workforce & Business Development

Request: \$150,000 – Overall Agency Budget

Planned Activities: Operate a talent pipeline program supporting high school students, college students, and young professionals with leadership and workforce development services.

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APPLICATION PACKETS

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Great Neighborhoods

OUTCOME

Focusing on comprehensive initiatives designed to create affordable housing and provide opportunities that align with creating great neighborhoods.

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FY 2027 Financial Partner Agency Summary

Alliance Center for Education

Agency Description

For 85 years, AC4Ed has utilized a two-generational approach to education. Our program supports families through a two-generational model, providing direct academic, character-building, and life skills to students while also helping parents access needed resources and comprehensive services. Through the work of our staff and the partnerships that form the “Alliance” we help families navigate to and access holistic programming, including financial literacy, nutritional support, access to interview prep and clothing for job interviews, and monthly parent leadership meetings and workshops.

Our program provides transportation and access to activities and locations within Charlotte that they would not otherwise be able to experience, helping expand their horizons and understanding of their community. Additionally, these experiences reinforce healthy behaviors, build individual character, teach how to navigate a variety of social situations, and help them discover their future career or educational options.

Current Financial Partner?

Yes

Agency Established

1969

FY 2027 Funding Request

\$155,000

FY27 Projected Overall Agency Budget	FY2027 Request	
\$13,574,164	\$155,000	1%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

7 years

Funding History

FY2024	FY2025	FY2026
\$90,000	\$90,000	\$90,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓
 Incomplete - ◇
 Not submitted - ✗

Application Scoring

Total Score: 94 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	14	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	17	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	14	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	15	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

The Out of School Time program creates age and grade-appropriate programming to support what students learn in school, exposes them to a variety of career options matching their interests, and

prepares responsible, well-adjusted citizens. We serve students during the school year in five classrooms in West Charlotte, and during the summer, students are in full-day programming. These programs are provided at no cost to income-eligible families.

Our students are from low-income households in neighborhoods feeding into ten partner schools. Based on CMS school report cards, these Title I schools average 69% economically disadvantaged students, with only 40.7% performing at grade level in math and 35.6% in reading. Chronic absenteeism averages 32.7%, 10% higher than the district average. These schools also hold average ratings of D, with Math and Reading EOG scores averaging D and F, respectively.

By operating directly in these low-income communities, we provide learning and development opportunities that these children and families would not otherwise be able to participate in, especially if transportation is a challenge. Our place-based programs aim to strengthen communities and their residents, while working with others providing similar and complementary services to enrich the experience to a level rivaling those costing hundreds of dollars per month. We are able to receive students via bus through our CMS partners and provide transportation by van to offsite events, activities, and field trips. Additionally, our new Junior Counselor program serves students from 8th to 10th grade and focuses on giving students resume-building activities while gaining real-world job experience through assisting in our program. They also have specific activities aimed at exposing them to a variety of career options.

We evaluate our success using quantitative and qualitative data, including grades, test scores, assessments, transcripts, report cards, EOG/EOC scores, attendance, and teacher/parent surveys. Goals include 85%+ school attendance, 90%+ program attendance, and grade-level promotion. We aim for 80% of students to show academic improvement and next grade readiness, and to make healthy, responsible choices in areas like wellness, substance use, and behavior.

2024/25 Academic Outcomes:

- 77% improved in core subjects (math, reading, science)
- 81% passed EOGs (up from average of D and F as noted above)
- 98% promoted to next grade
- 83% performed at/above grade level (up from 40.7% and 35.6% as noted above)
- 73% increased homework completion
- 77% improved reading comprehension and fluency

The OST program also sets goals for parent engagement. We provide intentional opportunities for parents to engage in their child's education, including Family Fun Nights, parent meetings, celebrations, and parent volunteerism. Parents are encouraged to work towards their own goals to empower their own upward mobility through job training and educational opportunities.

Describe the activities that will be supported through requested city funding

Personnel Salaries and Benefits:

Personnel will allocate \$114,951 for payroll and benefits. The two Site Managers and 2 Teachers will be allocated 50% to the city funding. Additionally, the Chief Program Officer providing oversight and direction will be allocated 30% to the city funding. Payroll taxes, health benefits, and retirement matches will also be paid out of this portion of funding.

As a Human Services agency, our people are the lifeblood of our programs. This support of our staff will help the direct day-to-day implementation of the services along with supporting the staff providing strategic direction to the activities, curriculum, and impact of our services. The staff will continue to build and develop ongoing relationships with community partners and feeder schools, increasing support for academics and CMS partnership through volunteering, academic interventions, post-secondary explorations, and character building.

Administrative Oversight:

To benefit from our economies of scale, we allocate a percentage of salaries to cover the cost of administrative services, such as financial management, human resources, marketing and communications, tech support, and others. We plan to allocate 55% of the OST program's cost to the City funding for a total of \$23,049.

Supplies:

We plan to allocate \$7,000 to curriculum-related materials to support STEAM activities, center instruction, cleaning and safety supplies. This includes costs related to food supplies ensuring healthy and nutritious meals and snacks for our students. Supplies for our new Junior Counselors program will be supported by this grant as well.

Travel & Training:

Educational field trips and summer camps will also be supported by the grant. These trips are fundamental to providing unique experiences and learning activities outside of the classroom that fosters a love for learning and adventure, while also offering opportunities for professional development. Included in this total are the costs for travel to these experiences, including van transport, mileage and entry fees. Total allocation \$5,000.

Technology:

Technology will allocate \$5,000 to support the annual database subscription cost for ChildPlus and Afterschool Headquarters software systems. This software tracks and evaluates student needs and outcomes along with communicating with students and parents related to enrollment, participation, and progress.

Total request - \$155,000

Strategies agency plans to implement to sustain the agency or program(s) in future years

We intentionally seek support from our community to grow individual giving and grant writing, as well as continue our efforts with board, church, and corporate giving. This creates diverse and sustainable revenue streams that allow us to continue our services beyond preschool. We also use the investment earnings from our endowment to support the OST Program's essential activities and seek additional funds from partners, sponsors, and donors to support additional enrichment activities and services. Some avenues for these funds include our Board-supported annual campaign and fundraising events. While we continue building our endowment, operating support remains critical. We have expanded our outreach efforts to include communities of faith, civic organizations, foundations, and others as active collaborating partners who work with us to generate volunteers, funds, in-kind support and public relations and advocacy efforts.

We are grateful for longstanding partnerships with Truist, United Women in Faith, First Horizon, United Way of Greater Charlotte, Sisters of Mercy, and others. We also seek new partners aligned

with our mission to serve underserved communities and promote upward mobility through education.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Increase community involvement through student civic engagement and community service	NEW MEASURE Number of agency and student-led programs to increase knowledge of civic issues	Not reported	Participation in four (4) projects per program year (August to July)
Student and family programming to educate on issues affecting our communities	NEW MEASURE Provide programming events in response to family interest as indicated on entrance surveys	Not reported	Four (4) events offered per program 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.	Not reported	80% of students and families meeting or exceeding goals
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	Not reported	Provide six (6) opportunities per program year for career/college exploration
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	Not reported	Provide mental health education and services twice (2) per month

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$246,263	\$263,366	\$162,587	\$162,587	\$92,196	57%
Merit	\$500	\$0	\$0	\$0	\$0	0%
Benefits	\$55,399	\$56,263	\$36,969	\$36,969	\$22,755	62%
Subtotal Personnel Expenses	\$302,162	\$319,629	\$199,556	\$199,556	\$114,951	58%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	0%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Communications (e.g. publishing, marketing)	\$18,970	\$9,995	\$12,221	\$12,221	\$0	0%
Facilities (e.g. rent, utilities)	\$49,567	\$49,456	\$43,266	\$43,266	\$0	0%
Office Supplies	\$890	\$1,718	\$1,400	\$1,400	\$0	0%
Travel & Training	\$32,496	\$20,833	\$8,700	\$8,700	\$5,000	57%
Technology	\$8,200	\$9,225	\$9,693	\$9,693	\$5,000	52%
Supplies - Program Delivery	\$22,674	\$17,573	\$18,010	\$18,010	\$7,000	39%
Audit and Legal Fees	\$2,183	\$3,463	\$2,582	\$2,582	\$0	0%
Interest and Bank Fees	\$0	\$0	\$0	\$0	\$0	0%
Direct Program Services	\$4,137	\$1,335	\$100	\$100	\$0	0%
Administration Oversight	\$57,854	\$69,303	\$42,272	\$42,272	\$23,049	55%
Subtotal Operating Expenses	\$196,971	\$182,901	\$138,244	\$138,244	\$40,049	29%
Total Expenditures	\$499,133	\$502,530	\$337,800	\$337,800	\$155,000	46%
Net Revenues	-\$107,635	\$20,005	-\$60,000	\$0		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$5,950	\$8,412	\$8,000	\$8,000
City Funding (financial partner or otherwise)	\$90,000	\$90,000	\$90,000	\$150,000
Mecklenburg County Funding	\$109,014	\$108,766	\$0	\$0
Foundation Grants & Funding	\$50,000	\$60,010	\$90,000	\$90,000
Donor Contributions	\$4,729	\$12,738	\$13,000	\$13,000
Service Fees	\$1,877	\$1,950	\$1,800	\$1,800
Cash Reserves and Interest Revenue	\$129,928	\$240,659	\$75,000	\$75,000
Total Revenues	\$391,498	\$522,535	\$277,800	\$337,800

Current Board of Directors

Anthony Stradford, Chair	Taylor Barbour	Katie Creighton
John DeMicco	Stephanie Jones	Lisa Marshall
Kim Langstaff	Rasheda Sanders	
Jorge Manjarres, Treasurer	Brittany Robinson	
Ronda K. Williams	David Elias	

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FY 2027 Financial Partner Agency Summary

Charlotte Center for the Arts

Agency Description

Charlotte Center for the Arts (CCA) is working to address a critical gap in South Charlotte’s cultural infrastructure. This area is one of the fastest-growing parts of the region and is continuing to expand rapidly, yet it lacks dedicated arts facilities, forcing residents and artists to travel long distances or go without cultural experiences. City and County studies, including the Charlotte Arts & Culture Plan, Charlotte Future 2040 Community Area Plans, and Charlotte State of Culture Report, have identified the urgent need for accessible, affordable arts spaces outside Uptown. Community feedback reinforces this, citing limited rehearsal, performance, and exhibition venues as a barrier to participation. We are responding by activating underutilized spaces to meet immediate needs for creative programming and affordable venues, and then opening a Community Arts Hub to provide a more permanent solution. Long term, we are advancing plans for a 100,000 sq. ft. flagship building and campus that will serve as a cultural destination and provide performance halls, studios, galleries, and gathering spaces, ensuring South Charlotte has the cultural infrastructure necessary to match its growth and deliver equitable access to the arts for all residents: artists, students, and patrons, alike.

Current Financial Partner?

No

Agency Established

2025

FY 2027 Funding Request

\$140,450

FY27 Projected Overall Agency Budget	FY2027 Request	
\$447,900	\$140,450	31%

Funding Request Category

Overall Agency Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	N/A	N/A	✓	N/A	✓

Submitted - ✓
 Incomplete - ◇
 Not submitted - ✗

*Items marked N/A were not required due to agency establishment date

Application Scoring

Total Score: 83 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	15	18-20 <i>Direct, compelling alignment</i>	14-17 <i>Clear alignment</i>	9-13 <i>General/indirect alignment</i>	0-8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	13	13-15 <i>Well-defined; outcome-connected</i>	10-12 <i>Clear; minor gaps</i>	6-9 <i>Underdeveloped</i>	0-5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	17	18-20 <i>Measurable outcomes; realistic targets</i>	14-17 <i>Adequate; mostly outcome-focused</i>	9-13 <i>Output-focused; limited detail</i>	0-8 <i>Unclear/missing</i>
Financial Health & Budget	15	13	13-15 <i>Complete; strong controls</i>	10-12 <i>Generally sound</i>	6-9 <i>Budget unclear</i>	0-5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	13	13-15 <i>Strong leadership & policies</i>	10-12 <i>Adequate; minor gaps</i>	6-9 <i>Capacity concerns</i>	0-5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	7	9-10 <i>Clear need; underserved focus</i>	6-8 <i>Need defined; limited data</i>	3-5 <i>Broad; limited justification</i>	0-2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3-4 <i>Partial diversification</i>	1-2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Specifically using this grant funding, our partnerships with property owners and organizations to sustain multidisciplinary spaces support our goal of collaborative efforts with local arts groups. These partnerships allow us to serve a diverse population of artists, cultural organizations, and residents in South Charlotte who currently lack access to affordable, purpose-built arts spaces. Charlotte's broader anti-displacement policies recognize the importance of providing affordable commercial space for small, locally owned businesses, this need extends to arts nonprofits and cultural organizations that cannot afford market-rate rents. By activating underutilized spaces and creating a Community Arts Hub, we will provide rehearsal rooms, performance venues, and exhibition spaces for local theater companies, dance troupes, visual artists, and multidisciplinary creators who have been searching for decades for accessible facilities. Our programming also serves residents of all ages and backgrounds by bringing arts experiences closer to home, reducing geographic and financial barriers, and fostering inclusive cultural participation in one of the fastest-growing areas of the region where dedicated arts spaces hardly exist today.

Describe the activities that will be supported through requested city funding

Charlotte Center for the Arts plans to utilize program funding to strengthen South Charlotte's arts ecosystem to rent and activate available, underutilized spaces and provide arts programming through partnerships with arts organizations, thereby increasing the volume and accessibility of arts programming for residents and artists in South Charlotte. "South Charlotte" is defined as areas "South Middle" and "South Outer" as identified in the Charlotte Future 2040 Community Area Plans. Some examples of the arts programming include performances, visual and performing arts master classes, space for rehearsals, art galleries, and cultural exhibitions.

The funding will support the hiring of a 1099 employee who will contract with property owners to secure and rent underutilized spaces, make arrangements with artists for programming, and provide marketing for the programming. Additionally, the funding will cover costs related to publishing and promotional activities to ensure broad community awareness of events and opportunities. Insurance coverage will be secured to protect staff, participants, and venues during programming. Essential office supplies and technology, such as computers, software, and communications equipment, will be purchased to facilitate day-to-day operations and program management. The funding will allow for equipment rental as needed for performances, exhibitions, and workshops, and will provide program supplies for both visual and performing arts activities. Training and professional development for staff and volunteers will be supported to enhance the quality and impact of programming, ensuring a well-equipped and knowledgeable team. Overall, these resources will strengthen the infrastructure and sustainability of CCA's arts initiatives, maximizing their reach and effectiveness throughout South Charlotte.

Collectively, through these programs CCA ensures that South Charlotte neighborhoods have stronger cultural infrastructure, more equitable access to community amenities, greater opportunities for local artists, and enriched public life. By increasing the availability, accessibility, and diversity of arts programming, the project enhances the cultural vibrancy and social cohesion of South Charlotte directly supporting the City of Charlotte's "Great Neighborhoods" priority to build thriving, connected, and inclusive communities.

Strategies agency plans to implement to sustain the agency or program(s) in future years

Charlotte Center for the Arts plans to finance future operations through both earned and contributed revenues. In addition to city funding, we are pursuing grant opportunities at the local, county, state and federal levels. We have a robust and multi-pronged fundraising plan for 2026, which includes a Founders private dinner in February, community launch events and online campaigns, with additional events to be added in the 2nd half of the year. Grants offset our programming costs, allowing us to offer opportunities for artists to showcase their work. This engages new audiences and expands the opportunity to experience culture in underserved areas of the Charlotte community.

Earned revenue will come through arts education programming and leasing facilities to artists. Our mission is aimed at providing space. While we aim to subsidize rental fees, they are also an important factor in our growth strategy, and we already have a list of parties interested in our spaces as soon as they become available.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Increased number of spaces rented/activated for arts programming	Facility rental logs Partnership agreements with property owners Internal program- tracking database	Year 1: Activate 3 spaces Year 2: Increase to 5 spaces
Increased access to arts programming (performances, classes, and events) for S. Charlotte residents	Program calendars and scheduling records Registrations and attendance logs collected at each event Program partner reports	Enable 15 programs in Year 1 Grow to 30 programs in Year 2
Expanded opportunities in S. Charlotte for artists to secure space for arts programming	Artist applications and intake forms Post-program artist surveys	Provide space access to 5 artists or artist groups in Year 1 At least 75% of supported artists report improved access to space
Increased participation in arts programming by patrons who live in S. Charlotte	Ticketing and registration systems with zip code capture On-site sign-in sheets including residency information	Reach 500 South Charlotte resident participants in Year 1 Achieve 60% local residency representation at events held in South Charlotte
Increased sense of importance of arts and culture to S. Charlotte residents	Pre/post community surveys Event-based satisfaction surveys Surveys at community events	Baseline: Establish in first 6 months through initial community survey Year 2: Achieve a 15% increase in residents reporting that arts/culture is more important than baseline

Overall Program Budget

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$0	\$0	\$20,000	\$130,000	\$45,000	35%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$0	\$0	\$0	\$29,900	\$10,450	35%
Subtotal Personnel Expenses	\$0	\$0	\$20,000	\$159,900	\$55,450	35%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$5,000	\$25,000	\$5,000	20%
Communications (e.g. publishing, marketing)	\$0	\$0	\$20,000	\$45,000	\$5,000	11%
Facilities (e.g. rent, utilities)	\$0	\$0	\$35,000	\$135,000	\$75,000	56%
Office Supplies	\$0	\$0	\$2,500	\$8,000	\$0	0%
Travel & Training	\$0	\$0	\$5,000	\$10,000	\$0	0%
Technology	\$0	\$0	\$4,500	\$15,000	\$0	0%
Equipment Rental	\$0	\$0	\$10,000	\$20,000	\$0	0%
Program Supplies (specific program supplies, paint, easels, etc.)	\$0	\$0	\$10,000	\$30,000	\$0	0%
Subtotal Operating Expenses	\$0	\$0	\$92,000	\$288,000	\$85,000	30%
Total Expenditures	\$0	\$0	\$112,000	\$447,900	\$140,450	31%
Net Revenues	\$0	\$0	\$43,000	\$152,550		

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$15,000	\$15,000
City Funding (financial partner and otherwise)	\$0	\$0	\$15,000	\$140,450
Mecklenburg County Funding	\$0	\$0	\$10,000	\$10,000
Foundation Grants & Funding	\$0	\$0	\$25,000	\$25,000
Donor Contributions	\$0	\$0	\$75,000	\$325,000
Service Fees	\$0	\$0	\$0	\$0

Other Revenue	\$0	\$0	\$15,000	\$85,000
Total Revenues	\$0	\$0	\$155,000	\$600,450

Current Board of Directors

- Julie Zilke
- Mitchell Dudas
- Colleen LeBleu
- Jeanine Qasim
- Hannah Kay Herdlinger

FY 2027 Financial Partner Agency Summary

Crisis Assistance Ministry

Agency Description

Housing stability is essential to the well-being of Charlotte-Mecklenburg families, yet many households are just one unexpected expense away from losing the security of their home. Crisis Assistance Ministry serves as the community's safety net, helping families overcome financial crises and maintain stable housing. Last fiscal year, due to high demand, more than 43,000 individuals received \$5.7 million in emergency housing assistance, keeping households stably housed with essential services connected. The agency plays a unique role in making it possible for residents who lack access to affordable housing to keep a safe, stable roof over their heads, especially when even a small setback threatens their housing.

The agency serves as a trusted steward of public investment, ensuring that City funding is applied directly to rent and utility assistance for families facing housing instability. Each contribution delivers an immediate, individualized, and tangible impact. The agency distributes \$20,000 to \$30,000 per day in emergency financial aid, which includes a budget conversation and support beyond the crisis. Even at this scale, requests for help exceed available resources, underscoring the depth of community need and the importance of sustained City support.

Crisis Assistance Ministry is honored to serve much like an administrative arm for the City of Charlotte's efforts to prevent housing loss and support vulnerable residents in moments of financial crisis. When families face eviction, unsafe living conditions, or mass displacement, the City of Charlotte has a partner that can rapidly deploy services to meet the goals of City leaders. This partnership enables coordinated and compassionate intervention. This decades-long relationship between the City and Crisis Assistance Ministry is unique in Charlotte-Mecklenburg and reflects a shared commitment to neighborhood safety and housing stability.

For example, when the city sought agency services to deploy ERA2 dollars last summer to provide emergency housing support, Crisis Assistance Ministry mobilized quickly to deliver deep and equitable relief. Between June and September 2025, this partnership stabilized over 800 Charlotte households, with nearly four in five families earning below the basic cost-of-living threshold. The agency continues to serve as a rapid-response partner during emerging crises, including recent situations in which vulnerable immigrant neighbors were unable to work because of ICE-related safety concerns. In each instance, the agency activates immediately to deliver coordinated, compassionate support that keeps families safe and housed, carrying out mission-driven work that strengthens neighborhoods.

The agency also extends the reach of public dollars through its Partner Agency Network, which allows caseworkers from grassroots and neighborhood-based organizations to submit online referrals for rent and utility assistance on behalf of families they serve directly from their location. This reduces barriers, ensures equitable access countywide, and brings aid directly to those in communities most burdened by rising housing costs. Beyond emergency financial aid, Crisis

Assistance Ministry supports longer-term financial well-being through one-on-one coaching designed to reduce debt, strengthen financial literacy, and reinforce stability.

Current Financial Partner?

Yes

Agency Established

1975

FY 2027 Funding Request

\$515,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$16,339,895	\$515,000	3%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

38

Funding History

FY2024	FY2025	FY2026
\$425,000	\$550,000	\$825,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓
 Incomplete - ◇
 Not submitted - ✗

Application Scoring

Total Score: 92 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	20	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	14	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	17	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	12	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	14	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Last year, 43,927 individuals benefited from services at Crisis Assistance Ministry. Of those receiving assistance, 41 percent were female and 59 percent were male. Among customers served, 60 percent identified as African American or Black, 4 percent as White, and 31 percent as Hispanic, Latino, or multiracial. Children and youth made up 40 percent of those served, and approximately 4 percent were seniors aged 65 or older.

Most households served reside in the City of Charlotte’s Corridors of Opportunity, where housing cost burden remains high. On average, the families Crisis Assistance Ministry serves spend 65 percent of their income on housing, more than double the nationally recognized threshold for affordability.

Most customers live at or below 200 percent of the Federal Poverty Level. In addition to assisting thousands of families who fall well below this threshold, the agency is directly connected to dozens of partners serving households with very limited or no income, ensuring equitable access to support for those most in need. All individuals assisted with Financial Partner funds must be residents of the City of Charlotte.

Describe the activities that will be supported through requested city funding

Requested City of Charlotte funding will provide direct rent and utility assistance to residents facing an immediate risk of eviction or disconnection. This support helps families remain safely housed, maintain essential utilities, and avoid the destabilizing consequences of homelessness. It also aligns with the City's Great Neighborhoods goal by advancing work that promotes housing affordability, stability, and access to opportunity. Together, the City and Crisis Assistance Ministry deliver coordinated and compassionate support that keeps residents connected to their homes and communities during moments of financial hardship.

Charlotte's affordable housing crisis is well documented, but what often receives less attention is the immediate support required to help families remain housed when they cannot access affordable options. Crisis Assistance Ministry provides this critical safety net, delivering the direct support that makes housing stability possible for families with limited options. Because City dollars are restricted to rent and utility assistance, the level of City investment directly determines how many households can be stabilized.

The scale of the housing crisis is substantial. In 2024, Mecklenburg County recorded a surprisingly high 46,026 eviction filings. Because each filing represents a head of household, the number of people affected is far greater, with enough residents facing eviction to fill the Spectrum Center six times. At Crisis Assistance Ministry, the average amount of assistance requested has risen 114 percent over five years, underscoring both the growing financial strain on households and the essential role of community support. The typical customer earns about \$12 per hour, just one-third of the \$35 per hour Housing Wage needed to afford a modest apartment in Charlotte, illustrating the stark gap between income and stability.

City support not only provides emergency rent and utility assistance; it also connects families to a wider set of Stability Services that promote longer-term financial security. These integrated supports help families preserve their homes, redirect income to other necessities, and avoid the steep decline that often accompanies housing loss.

City Energy Assistance funds are used to make direct payments to utility companies on behalf of eligible low-income households, while City Emergency Rental Assistance funds support residents living at City-designated addresses who cannot meet rent obligations during a crisis. For both rent and utility assistance, each assessment begins with a clear understanding of the customer's available resources, empowering families to be part of the solution while City funding covers the portion they cannot. This personalized approach stretches funds further and stabilizes additional families.

City funding is also leveraged alongside private contributions and Crisis Assistance Ministry's Stability Services, which together provide two essential benefits: direct income support and meaningful income savings, depending on a family's needs. These services serve two purposes:

- Direct financial relief - preventing evictions or utility disconnections through emergency aid
- Cost-saving supports - connecting families with resources that reduce monthly expenses and free up income for immediate needs, including:

- Essential items: Families receive donated clothing and household goods at no cost, allowing many to redirect up to \$200 toward basic needs such as food and transportation. In FY25, more than 1.8 million items valued at \$6.6 million were distributed to over 21,000 unique individuals.
- Financial coaching: Once immediate needs are met, customers may participate in one-on-one coaching to reduce debt, build savings, and work toward longer-term stability.

For FY27, Crisis Assistance Ministry respectfully requests \$205,000 for utility assistance and \$310,000 for rental assistance. This continued partnership will bring dignity, hope, and stability to many Charlotte residents working to avoid eviction and maintain their housing. Although the need has not decreased, Crisis Assistance Ministry is submitting a reduced request out of respect for current public budget pressures and in recognition of one-time federal stimulus dollars that previously expanded local resources.

Strategies agency plans to implement to sustain the agency or program(s) in future years

The Advancement Plan of Crisis Assistance Ministry aligns with and supports the agency's mission, values, and strategies. There are four pillars of success utilized to grow revenue and they ensure agency sustainability:

1. Board of Directors: The Board is active, engaged, and fully committed to advancing agency goals through personal philanthropy, representation at community events, and leveraging their networks to expand awareness. Board members also play a critical role in connecting agency leadership with prospective donors.
2. Integrated Advancement Strategy: Led by a highly skilled Chief Advancement Officer, the Advancement team uses a unified approach grounded in clear KPIs across fundraising, volunteer engagement, marketing, community relations and education, communications, and donor systems. This integration creates a seamless donor experience and ensures customized engagement and stewardship throughout the donor lifecycle.
3. Major Donor Program: With 4 percent of individual donors contributing roughly 70 percent of total revenue, the Major Donor Program remains essential. Under the leadership of the Senior Major Gifts Officer, this program strengthens relationships with individual donors to cultivate, solicit, retain, and steward major gifts. It also includes an expanding Planned Giving component that supports long-term sustainability.
4. Annual Donor Acquisition and Recurring Giving: To support long-term sustainability, the agency is strengthening its annual donor acquisition efforts while deepening engagement with existing supporters to grow recurring giving. This includes investment in modern fundraising tools such as enhanced online giving infrastructure, text-to-give options, QR codes, and strategic use of social media to reach younger supporters and diversify the donor base. These strategies make it easy for donors to give weekly, monthly, or quarterly while expanding the number of first-time contributors who become long-term partners.

Strong oversight and planning protect our mission. Each year, the Executive Team sets goals grounded in past accomplishments and emerging community needs. The Chief Financial Officer oversees a complex monthly cash flow process to ensure resources are in place for both

emergency aid and casework operations. The Board of Directors also maintains a CEO Succession Plan, reviewed regularly, and strengthens sustainability by actively cultivating donor relationships.

Diversified funding remains a cornerstone of sustainability. The agency builds strong community partnerships to reduce duplication, expand coordination, and diversify revenue streams. Even amid external shifts, such as a \$400,000 reduction in County contracts and a federal pause in emergency rent funds, Crisis Assistance Ministry has adapted strategically, engaging donors to close gaps and protect essential services.

Our long history, strong reputation, engaged Board, and experienced leadership team all contribute to financial and organizational sustainability. These foundations ensure that as challenges grow, so does the agency’s ability to help thousands of families move from crisis toward lasting stability.

Performance Measures and Targets

Objective	Measure	FY 2025 Actual	FY2026 Mid-year	FY2027 Target
Provide rental assistance for low-income families through the Rental Assistance Program	Number of client households served	497	188	590
Provide utility assistance for low-income families through the City Energy Assistance Program	Number of client households served	759	119	650

Overall Program Budget

Program Expenditures FY 2025 - FY 2027					Percent city request of overall budget
	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel					
Salaries	\$2,584,561.00	\$2,082,189.00	\$2,082,189.00	\$20,000.00	1%
Merit	\$449,948.00	\$413,873.00	\$413,873.00	\$0.00	0%
Benefits	\$181,102.00	\$150,513.00	\$150,513.00	\$0.00	0%
Subtotal Personnel Expenses	\$3,215,611.00	\$2,646,575.00	\$2,646,575.00	\$20,000.00	1%
Operating					
Capital Equipment (e.g. vehicles, computers)	\$36,865.00	\$31,850.00	\$31,850.00	\$0.00	0%
Communications (e.g. publishing, marketing)	\$34,186.00	\$16,405.00	\$16,405.00	\$0.00	0%

Program Expenditures FY 2025 - FY 2027					Percent city request of overall budget
	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Facilities (e.g. rent, utilities)	\$65,946.00	\$66,341.00	\$66,341.00	\$0.00	0%
Office Supplies	\$10,119.00	\$14,500.00	\$14,500.00	\$0.00	0%
Travel & Training	\$4,796.00	\$7,700.00	\$7,700.00	\$0.00	0%
Technology	\$148,460.00	\$124,606.00	\$124,606.00	\$0.00	0%
Fees and Services	\$25,357.00	\$23,560.00	\$23,560.00	\$0.00	0%
Insurance	\$21,062.00	\$15,400.00	\$15,400.00	\$0.00	0%
Staff/Volunteers Appreciation	\$14,308.00	\$9,460.00	\$9,460.00	\$0.00	0%
Meeting Expenses	\$2,339.00	\$3,300.00	\$3,300.00	\$0.00	0%
Misc. Admin Expenses	\$13,006.00	\$0.00	\$0.00	\$0.00	0%
Subtotal Operating Expenses	\$376,444.00	\$313,122.00	\$313,122.00	\$0.00	0%
Client Aid					
Direct Client Aid	\$5,330,851.00	\$5,656,560.00	\$4,273,649.00	\$495,000.00	12%
Client Aid - Materials	\$0.00	\$0.00	\$0.00	\$0.00	0%
Subtotal Client Aid Expenses	\$5,330,851.00	\$5,656,560.00	\$4,273,649.00	\$495,000.00	12%
Total Expenditures	\$8,922,906.00	\$8,616,257.00	\$7,233,346.00	\$515,000.00	7%
Net Revenues	-\$377,344.40	-\$550,000.00	-\$550,000.00		

Program Revenues (do not include city funding)			
	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$823,340.60	\$850,000.00	\$0.00
Mecklenburg County Funding	\$3,086,592.00	\$2,496,143.00	\$2,099,896.00
Foundation Grants & Funding	\$576,355.00	\$734,400.00	\$714,000.00
Donor Contributions	\$3,626,756.00	\$3,773,113.00	\$3,666,849.00
Donor Contributions - In-Kind	\$62,601.00	\$62,601.00	\$62,601.00
Service Fees	\$0.00	\$0.00	\$0.00
Other Revenue	\$369,917.00	\$150,000.00	\$140,000.00
Total Revenues	\$8,545,561.60	\$8,066,257.00	\$6,683,346.00

Current Board of Directors

Kerry-ann Archer
Chasity Boyce
Liz Escobar-Fernandes
Debra Foster
Ed Holland
Janette Kinard
Raj Merchant
Stuart Proffitt

Lucina Blue
Deborah Brewer
Gina Esquivel
Tamera Green
Melia James
John Magnuson
Annie Moyer
Ken Szymanski

Brian Boone
Keith Brunnemer
Kati Everett
Yog Hari
Deidre John
Alexis McDaniels
Anne Poole
Cameron Wagner

FY 2027 Financial Partner Agency Summary

Dream Key Partners

Agency Description

DreamKey Partners, Inc. (DKP) is a Charlotte-based nonprofit affordable housing development and financial partner organization focused on expanding access to high-quality, sustainable housing opportunities for low- and moderate-income households. DKP serves as a mission-driven real estate developer, financial intermediary, and long-term steward of public and private investment, leveraging City resources alongside state, federal, and philanthropic funding to deliver housing that advances equitable neighborhood development.

Unlike direct service providers, DKP operates as a financial and development partner, structuring, underwriting, and managing complex housing transactions that would not otherwise be feasible in the private market. Our role is to maximize public impact per dollar invested by aligning capital, compliance, and community outcomes over the long term. DreamKey has developed significant and durable relationships with lenders and affordable housing investors. These sources of capital are combined in the capital stack needed to finance our new communities and/or preserve existing properties.

Since its establishment, DKP has played a critical role in advancing Charlotte's affordable housing goals by delivering both rental and homeownership opportunities, strengthening neighborhood stability, and ensuring long-term affordability through responsible asset management and compliance oversight. DreamKey's developments have also served as a catalyst of growth for Charlotte neighborhoods such as the Statesville Avenue Corridor and other West Charlotte neighborhoods. DreamKey is now focused on supporting the growth of the Beatties Ford corridor and the Grier Heights neighborhood.

Dream Key has learned many lessons over the past 35 years of working in Charlotte. We have developed an Impact Model that captures the lessons learned. The Impact Model is built to translate public investment into measurable long-term outcomes for residents and neighborhoods. Guided by our mission and vision, we prioritize community-centric development that supports economic mobility and the social determinants of health, pairing housing production with comprehensive, whole-person solutions.

We apply a disciplined decision framework that standardizes the data needed to evaluate each opportunity, scores alignment to strategic priorities, and uses impact assessments, key performance indicators, and post-project evaluation to ensure we are maximizing impact per dollar over time. In practice, this includes a replicable community development model in which DreamKey serves as a backbone partner, convening strategic partners to help bring supportive services and pathways into our communities, including workforce connections, financial literacy, access to health-related supports, and other quality-of-life enhancements. We also invest in data and learning infrastructure to continuously improve performance and share insights that help scale what works.

DKP advances access by ensuring that affordable housing units are located in neighborhoods with proximity to employment centers, transportation, and community amenities, and by structuring developments that serve households across a range of income levels consistent with City policy.

DKP also promotes equitable access through transparent eligibility criteria, compliance monitoring, and coordination with partner organizations responsible for tenant selection and buyer qualification. Where appropriate, DKP supports access through clear program materials and partner-led outreach that reduces barriers to participation, including language access and accessible formats, consistent with City requirements.

Current Financial Partner?

Yes

Agency Established

1988

FY 2027 Funding Request

\$250,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$24,964,105	\$250,000	1%

Funding Request Category

Agency Budget

Total years financial partner with City of Charlotte

37

Funding History

	FY2024	FY2025	FY2026
Federal Grant	\$1,417,953	\$1,300,000	\$1,300,000
General Fund	\$231,000	\$231,000	\$0

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓
 Incomplete - ◇
 Not submitted - ✗

Application Scoring

Total Score: 92 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	20	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	14	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	14	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	14	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	15	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

DKP’s work directly benefits low- and moderate-income households across the City of Charlotte, including individuals and families earning at or below established Area Median Income (AMI) thresholds. Through both rental and homeownership developments, DKP serves households at varying income levels, with particular emphasis on households most impacted by housing cost burden and displacement pressures.

While DKP does not provide case management or direct social services, the households served directly occupy, purchase, or benefit from housing units developed, financed, or preserved through DKP-led projects. These households gain access to stable, high-quality housing located in opportunity-rich neighborhoods, supporting long-term economic mobility and community stability.

In addition to our rental communities, DreamKey has long held the belief that attainable homeownership is a powerful wealth-building tool. Through City-aligned homeownership development and financing programs, DKP expands pathways for first-time homebuyers and working households to purchase safe, energy-efficient homes while meeting eligibility, affordability, and compliance requirements established by the City and applicable funding sources.

DKP primarily advances the City of Charlotte's Great Neighborhoods strategic priority by delivering affordable housing as foundational infrastructure for healthy, stable, and inclusive communities. Housing stability enables positive outcomes across education, workforce participation, health, and neighborhood vitality, making affordable housing a necessary precondition for broader community success.

In line with the Great Neighborhoods focus, DKP has extensive experience creating sustainable stability across multiple neighborhoods in Charlotte. This experience spans the organization's history and includes numerous communities in the Statesville Avenue corridor, including Greenville, Genesis Park, Druid Hills, and Brightwalk. DreamKey also led to the revitalization of the Seversville neighborhood. Now DreamKey brings the same focus to the Beatties Ford corridor and Grier Heights.

In the Beatties Ford corridor, DreamKey is relying on experience regarding the value of homeownership in building a great neighborhood. To this aim, DreamKey is building Aveline at LaSalle (AKA, Phoenix Rising). The development will consist of 26 townhome units across six buildings, with each townhome featuring three bedrooms, 2.5 bathrooms, approximately 1,300 square feet of living space, and a one-car garage. The community is 100% affordable, targeting households with incomes up to 80% of Area Median Income, with projected sale prices in the mid-to high-\$200,000s. The City of Charlotte donated the land for the project. This development, when completed, will bring long-term investment to the corridor and catalyze further development, including 26 opportunities for homeownership.

DreamKey also plans to continue bringing homeownership to the corridor with another mixed-income development, Old Point Comfort, to be built on an assemblage of parcels across from the McCrory YMCA. A four-acre portion of the property will be developed into up to 38 townhomes, and an adjacent parcel is now under contract, allowing construction of townhomes, single-family homes, and duplexes. Combined, the parcels may accommodate a mixed-income community of approximately 100 homes.

In addition to our work in the Beatties Ford corridor, DreamKey is also working to bring affordable and mixed-income housing to the Grier Heights neighborhood. DreamKey was selected as the preferred developer by Mecklenburg County after a competitive request for proposals (RFP). Before being chosen as the preferred developer, DreamKey's involvement in the community began with the acquisition of Wendover Walk, a 90-unit Naturally Occurring Affordable Housing (NOAH) multifamily apartment located less than a half mile from the proposed development. Even before the RFP, DreamKey and our community partner, CrossRoads Community Development Corporation (CrossRoads), hosted a series of community engagement events. These "Indabas," a Zulu tribal term meaning a gathering of local leaders to discuss matters of concern, were held to engage residents, educate them, and provide an opportunity for Grier Heights residents to help shape their neighborhood's redevelopment. Community engagement and participation from the residents

helped shape the proposed development by incorporating their feedback into the master plan. DreamKey plans to develop a 14-acre site owned by Mecklenburg County into a mixed-income, multi-generational community.

The proposed development will comprise various residential product types, including multifamily and single-family Low Income Housing Tax Credit (LIHTC) rental developments and single-family attached and detached for-sale homes, totaling approximately 289 residential units. The units will target individuals and families with income levels between 30% and 80% of the Area Median Income (AMI).

Finally, DreamKey is furthering the City's faith-based housing initiative by continuing to build on land owned by the Charlotte faith community. The next development will be on land currently owned by Newell Presbyterian Church. The development is located at 1500 Rocky River Road West in Charlotte, North Carolina, and will consist of 54 for-sale townhomes configured as triplex buildings. All units will feature 3-bedroom floor plans and are targeted at households earning up to 80% of Area Median Income. Site control is currently secured through a Memorandum of Understanding.

DreamKey's stewardship-oriented approach also aligns with the City's emphasis on well-managed government by protecting public investment through compliance oversight and transparent reporting.

Describe the activities that will be supported through requested city funding

City of Charlotte funding supports DKP's core financial partner functions across the full lifecycle of affordable housing development, from pre-development and financing through construction, stabilization, and long-term affordability stewardship. These activities ensure that City funds are deployed efficiently, compliantly, and in direct support of delivering completed, occupied housing units aligned with adopted housing policies.

Specifically, City funding allows DKP to:

- Structure, underwrite, and close affordable housing transactions that leverage City funds with state, federal, and private capital, enabling projects to advance from concept through financial close.
- Provide construction-phase financial oversight, including coordination with lenders and development partners, review of construction budgets and draws, and monitoring of financial performance to reduce delivery risk and cost overruns.
- Administer regulatory and program compliance throughout development and construction, including affordability requirements, income targeting, labor standards, and contract-specific reporting obligations.
- Coordinate across City departments, developers, lenders, and service providers to resolve financing, compliance, or execution issues that could delay or jeopardize unit delivery.
- Provide ongoing asset management and long-term monitoring to ensure completed units remain affordable, well-maintained, and in compliance throughout required affordability periods.

- Maintain systems, internal controls, and documentation necessary for timely City reporting, audit readiness, performance measurement, equity and access tracking, and MWBE utilization reporting, as required by contract.

These activities directly expand the City’s capacity to deliver affordable housing units without increasing internal staffing, while reducing financial, compliance, and delivery risk. Funds requested support program delivery capacity and one-time or program-specific expenses tied to these functions, consistent with Financial Partner requirements. Together, these functions ensure that City-funded projects move efficiently from award to completion, resulting in completed, occupied units that remain affordable over the long term and directly supporting DKP’s ability to meet the access and performance measures outlined in this partner request.

DKP is requesting \$250,000 in City of Charlotte Financial Partner funding to support these core program delivery and financial partner functions. The requested funding will support organizational capacity and program-specific expenses necessary to underwrite, finance, oversee construction, ensure compliance, and steward City-assisted affordable housing projects through completion and long-term affordability, as further detailed in the attached budget.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Advance project execution	Number of townhome projects advancing at least one development stage during the fiscal year: (1) site control, (2) entitlement/design, (3) financing, (4) vertical construction, (5) completion.	≥ 3 projects
Maintain active construction activity	Total number of townhome units under vertical construction at any point during the fiscal year	≥ 15 units
Deliver completed townhome units	Total number of townhome units receiving a Certificate of Occupancy during the fiscal year	≥ 30 units
Maintain financial control over development projects	Percentage of active townhome projects eligible for HouseCharlotte Downpayment Assistance.	≥ 90%

Overall Agency Budget

	Expenditures FY 2024- FY 2027					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$4,369,160	\$4,837,578	\$5,319,475	\$5,471,007	\$167,500	3%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$922,312	\$1,011,907	\$1,235,880	\$1,327,968	\$40,000	3%

Expenditures FY 2024- FY 2027						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Subtotal Personnel Expenses	\$5,291,472	\$5,849,485	\$6,555,355	\$6,798,975	\$207,500	3%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$1,470,000	\$1,470,000	\$6,900,000	\$6,450,000	\$0	0%
Communications (e.g. publishing, marketing)	\$293,000	\$148,000	\$159,690	\$170,000	\$0	0%
Facilities (e.g. rent, utilities)	\$209,880	\$207,480	\$209,940	\$268,600	\$13,500	5%
Office Supplies	\$22,500	\$22,500	\$21,300	\$19,800	\$0	0%
Travel & Training	\$128,960	\$135,020	\$113,100	\$165,300	\$0	0%
Technology	\$88,200	\$88,200	\$93,200	\$82,200	\$0	0%
Other: Professional Fees	\$0	\$0	\$436,400	\$581,800	\$29,000	5%
Other: Program Expenses	\$0	\$0	\$308,980	\$253,580	\$0	0%
Other: Property Operating Exp	\$0	\$0	\$473,150	\$534,060	\$0	0%
Other: Cost of Sales (homes)	\$0	\$0	\$9,985,000	\$8,543,650	\$0	0%
Other:	\$20,255,555	\$5,264,122	\$695,460	\$1,096,140	\$0	0%
Subtotal Operating Expenses	\$22,468,095	\$7,335,322	\$19,396,220	\$18,165,130	\$42,500	0%
Total Expenditures	\$27,759,567	\$13,184,807	\$25,951,575	\$24,964,105	\$250,000	1%
Net Revenues	-\$760,863	\$2,196,854	-\$2,866,464	-\$7,096,440		

	Revenues			
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$480,000	\$4,944,500	\$3,850,000	\$3,060,000

	Revenues			
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
City Funding (financial partner and otherwise)	\$0	\$0	\$0	\$1,950,000
Mecklenburg County Funding	\$0	\$0	\$3,500,000	\$2,500,000
Foundation Grants & Funding	\$122,500	\$117,500	\$105,000	\$150,000
Donor Contributions	\$75,000	\$0	\$40,000	\$40,000
Service Fees	\$24,909,900	\$8,162,855	\$13,794,500	\$8,605,000
Other Revenue	\$1,411,304	\$2,156,806	\$1,795,611	\$1,562,665
Total Revenues	\$26,998,704	\$15,381,661	\$23,085,111	\$17,867,665

Current Board of Directors

- | | | | |
|---------------------|---------------------|----------------------|---------------------|
| Andrew Bodary | Dr. Stacey Brown | AJ Calhoun | Atty. Ticora Davis |
| Jennifer De La Jara | Jennifer Deutsch | LaTyoa Faustin | Judge Linwood Foust |
| Brenda Hayden | Jessica Hindman | Dave Kautter | Min. Beverly Knox |
| Elizabeth McMillan | Jacqueline O’Garrow | Sheldon Osborne | Winston Robinson |
| Kristine Rutter | Joaquin Soria | Rode Thomas-Stoddard | Stephen Windell |

FY 2027 Financial Partner Agency Summary

Groundwater Solutions

Agency Description

Groundwater Solutions, Inc. is a community-based nonprofit providing integrated housing stabilization, mental and behavioral health services, reentry support, crisis assistance, and family-centered programming to vulnerable residents in North Carolina. Our mission is to reduce barriers created by poverty, trauma, homelessness, and justice involvement by providing holistic programming that meets people where they are.

Current Financial Partner?

No

Agency Established

2019

FY 2027 Funding Request

\$99,832

FY27 Projected Overall Agency Budget	FY2027 Request	
\$99,832	\$99,832	100%

Funding Request Category

Overall agency budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Financial Statements	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum	
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	Submitted - ✓
										Incomplete - ◇
										Not submitted - ✗

Application Scoring

Total Score: 79 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	18	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	10	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	17	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	10	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	12	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	9	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	3	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

- Individuals and families experiencing homelessness
- Justice-involved residents returning to the community
- Low-income households facing housing, food, transportation, or employment barriers
- Individuals with mental health needs
- Families requiring crisis assistance

Describe the activities that will be supported through requested city funding

City funding will support the Family Promise Transitional Housing & Returning Citizens Transitional Housing Programs, including emergency housing, transportation assistance, peer support, case management, crisis distribution (beds, food, clothing), and community partnership expansion.

Strategies agency plans to implement to sustain the agency or program(s) in future years

Groundwater Solutions plans to sustain programming through CRA-aligned banking partnerships, foundation grants, corporate sponsorships, individual giving campaigns, annual fundraising events including the Juneteenth Freedom Through Healing Gala, program-based billing, and a structured volunteer program.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Reduce homelessness through housing stability.	Percentage of households remaining housed during participation.	85% housing stability
Reduce justice involvement among returning citizens.	Percentage with no new justice involvement during participation.	85% with no new justice involvement
Minimize disruption for children during housing transitions.	Percentage of children maintaining school continuity.	100% school continuity
Transition households to permanent housing.	Percentage exiting to permanent affordable housing.	70% permanent exits within 9 months
Promote neighborhood engagement and reduce crisis reliance.	Reduction in emergency or crisis interventions post-housing.	30% reduction in crisis interventions

Overall Agency Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$0	\$0	\$54,691	\$56,879	\$56,879	100%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$0	\$0	\$6,971	\$7,250	\$7,250	100%
Subtotal Personnel Expenses	\$0	\$0	\$61,662	\$64,129	\$64,129	100%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)	\$0	\$0	\$1,465	\$1,524	\$1,524	100%
Facilities (e.g. rent, utilities)	\$0	\$0	\$27,191	\$28,279	\$28,279	100%
Office Supplies	\$0	\$0	\$1,172	\$1,219	\$1,219	100%
Travel & Training	\$0	\$0	\$0	\$0	\$0	0%
Technology	\$0	\$0	\$0	\$0	\$0	0%
Other: Community Programming & Education	\$0	\$0	\$2,344	\$2,438	\$2,438	100%
Other: Insurance	\$0	\$0	\$1,916	\$1,993	\$1,993	100%
Other: Legal & Professional	\$250	\$250	\$250	\$250	\$250	100%
Subtotal Operating Expenses	\$250	\$250	\$34,338	\$35,703	\$35,703	100%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Total Expenditures	\$250	\$250	\$96,000	\$99,832	\$99,832	100%
Net Revenues	\$1,291	\$1,750	-\$24,000	-\$12,832		

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner and otherwise)	\$0	\$0	\$0	\$0
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding	\$0	\$0	\$0	\$0
Donor Contributions	\$1,541	\$2,000	\$2,000	\$2,000
Service Fees	\$0	\$0	\$70,000	\$85,000
Other Revenue	\$0	\$0	\$0	\$0
Total Revenues	\$1,541	\$2,000	\$72,000	\$87,000

Current Board of Directors

Donna McKoy Lisa McLamb
 Bryant Dozier Darrykl Frost
 Desmond Miller

FY 2027 Financial Partner Agency Summary

Hearts for the Invisible Charlotte Coalition

Agency Description

Hearts for the Invisible Charlotte Coalition (HFTICC) is a community-driven nonprofit dedicated to reducing homelessness and improving the well-being of individuals and families experiencing homelessness in Charlotte and Mecklenburg County. Founded in 2020 by Jessica Lefkowitz as a grassroots response to the urgent needs amplified by the COVID-19 pandemic, HFTICC has grown from direct outreach efforts into a coordinated initiative that provides sustainable pathways out of homelessness.

HFTICC delivers trauma-informed, holistic services focusing on housing stability, mental health, economic mobility, and overall quality of life. The organization addresses immediate needs, such as food, hygiene, and shelter, and long-term solutions to foster independence and stability. Through partnerships with local organizations, government agencies, businesses, and healthcare providers, HFTICC ensures individuals have access to comprehensive support.

Core Values

- Equity: Ensuring that everyone has equal access to resources and opportunities regardless of their background or circumstances.
- Compassion: Providing care and support with empathy and understanding.
- Collaboration: Working together with community partners and grassroots organizations to amplify impact.
- Integrity: Upholding transparency and accountability in all our efforts.
- Advocacy: Championing the rights and needs of those experiencing homelessness to influence systemic change.

Current Financial Partner?

Yes

Agency Established

2020

FY 2027 Funding Request

\$350,000

FY27 Projected Overall Agency Budget	FY2027 Request	
\$1,517,400	\$350,000	23%

Funding Request Category

Overall Agency Budget

Total years financial partner with City of Charlotte

2

FY2025	FY2026
\$100,000	\$100,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 89 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	13	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	18	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	12	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	13	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	4	5	3–4	1–2	0

Category	Max Points	Score	Excellent	Good	Fair	Poor
			<i>Diversified; strong sustainability</i>	<i>Partial diversification</i>	<i>Minimal planning</i>	<i>None described</i>

Population Served

The population for this grant includes individuals and families experiencing unsheltered homelessness in Charlotte-Mecklenburg, particularly those with the most significant barriers to housing stability. We engage people living in places not meant for human habitation; streets, encampments, vehicles, and abandoned buildings, many of whom face chronic health conditions, mental illness, substance use disorders, and disabilities.

Our clients are racially and ethnically diverse, with a large portion identifying as Black or African American, reflecting systemic disparities in housing access and economic mobility. Many live well below the poverty line, with populations including unaccompanied youth, older adults, and veterans. We also serve people recently released from incarceration, LGBTQ+ individuals experiencing housing discrimination, and families with children in need of childcare, education, and stable housing options.

HFTICC centers equity and cultural responsiveness in all programming to ensure access across lines of race, gender, age, national origin, and life circumstance. Outreach and services are tailored to the needs of these diverse populations, reducing systemic barriers and creating pathways to long-term stability, dignity, and self-sufficiency.

Describe the activities that will be supported through requested city funding

Hearts for the Invisible Charlotte Coalition (HFTICC) respectfully requests \$350,000 in funding from the City of Charlotte to sustain and expand our impact in addressing homelessness across Charlotte and Mecklenburg County. This investment will support core activities in three strategic areas: culturally competent street outreach, organizational capacity building, and long-term sustainability and financial development.

1. Culturally Competent Street Outreach Services

The majority of requested funding will support salaries for two dedicated outreach workers focused on the Uptown Charlotte area. This team, currently funded through HOME ARP, plays a critical role in engaging individuals experiencing unsheltered homelessness in a high-need zone. With the expiration of HOME ARP funding, continued City support is vital to avoid service disruptions and maintain a consistent, trauma-informed presence in Uptown.

Outreach staff will engage directly with individuals experiencing homelessness, meeting them where they are, building trust, and connecting them to resources such as mental health and substance use, identification services, emergency shelter, permanent supportive housing options, and more. These services are guided by a data-informed approach using insights from the Mecklenburg County Homeless and Housing Dashboard to ensure outreach is targeted, responsive, and aligned with real-time community needs.

City funding will enable HFTICC to:

- Retain and train two full-time outreach workers for Uptown Charlotte.
- Increase presence in high-need areas and expand reach to underserved populations.
- Deliver culturally and linguistically responsive outreach tailored to the diverse experiences of those living unsheltered.

2. Organizational Capacity Building

To support the effectiveness and scalability of our outreach and supportive services, HFTICC will invest in internal infrastructure, staff development, and essential tools. Capacity-building activities include:

- Technology and software upgrades (e.g., donor and grants management platforms, Microsoft Office) to improve operational efficiency and communications.
- Professional development and training in trauma-informed care, crisis intervention, and evidence-based service models.
- A contracted Human Resources specialist to support compliance, staff wellness, and organizational growth.

These enhancements will strengthen our ability to deliver high-quality services, attract new partners, and increase public awareness of our work.

3. Organizational Sustainability and Financial Development

To support long-term organizational growth and financial resilience, HFTICC will allocate a portion of funding toward the salary of the Director of Impact and Development. This role is essential to strengthening our fundraising infrastructure and advancing a sustainable funding strategy.

Additional sustainability-focused activities include an annual third-party financial audit to reinforce transparency, donor confidence, and fiscal accountability.

Together, these investments will position HFTICC to meet increasing demand for services while enhancing long-term impact and sustainability.

Strategies agency plans to implement to sustain the agency or program(s) in future years

Hearts for the Invisible Charlotte Coalition (HFTICC) is committed to building a robust and diversified financial foundation to ensure the long-term sustainability of our outreach programs and organizational growth, reducing dependency on any single funding source. Should City Council approve our funding request, we are prepared to implement a comprehensive sustainability plan that leverages diversified revenue streams, strategic partnerships, and strengthened internal capacity.

1. Diversified Funding Portfolio

We will expand and enhance our grant-seeking efforts by actively pursuing federal, state, and private foundation grants aligned with our mission. A key role in this effort will be the Director of Impact and Development, whose position is partially supported by this request. This role will lead strategic fundraising initiatives, including:

- Identifying and applying for competitive funding opportunities across sectors.
- Cultivating new relationships with philanthropic and corporate funders.
- Tracking and measuring outcomes to support compelling grant reporting and renewals.

Additionally, we aim to grow our base of recurring individual donors through a comprehensive engagement strategy that includes personalized appeals, regular impact updates, donor recognition, and storytelling that highlights the real-world outcomes of their support.

2. Corporate Sponsorships and Strategic Partnerships

We will actively cultivate partnerships with local and national businesses that align with our mission and values. These partnerships will provide financial support, in-kind contributions, and sponsorship opportunities for events and initiatives. We recognize the importance of aligning our programs with corporate social responsibility (CSR) goals and will provide visibility and community engagement opportunities that deliver mutual value.

3. Fundraising Events and Community Engagement

In 2026 we will host our first major annual fundraising event that will allow us to increase public awareness, attract new supporters, and strengthen community investment in our mission. We will also host several smaller events that will serve as both fundraising and relationship-building opportunities, creating space for long-term donor engagement.

4. Operational Efficiency and Capacity Building

Sustainability also requires efficient and scalable operations. To that end, we will invest in technology that improves service delivery, streamlines internal processes, and enhances data management and reporting. This includes donor management software, grant tracking tools, and business operations software. By increasing our organizational efficiency, we can maximize the impact of every dollar received.

Through this strategic combination of diversified revenue generation, enhanced development capacity, corporate and community partnerships, and operational efficiency, HFTICC is positioned to sustain and grow our programs well beyond the current fiscal year of City funding.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Culturally Competent Street Outreach Services: HFTIC will continue to provide culturally component street outreach services as they connect those experiencing homelessness w/ es	Fund positions for street outreach uptown	1 staff member	Fund two positions
Create pathways out of homelessness through direct outreach	Number of individuals serviced through funding	New Measure	250 individuals annually
Strengthen community well-being through responsive services	Number of individuals connected to wraparound services (e.g., ID recovery, behavioral health, income support)	New Measure	100 individuals annually
To ensure the success of its expanded outreach efforts, HFTIC will strengthen its internal operations and organizational capacity through increased administrative support	The number of additional Administrative Support staff and contractors	New Measure	HFTIC will secure the services of a Human Resource professional by the end of the grant period.

Overall Program Budget

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$394,535	\$492,871	\$612,000	\$777,000	\$229,000	29%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Taxes & Benefits	\$52,819	\$81,936	\$113,840	\$146,400	\$50,000	34%
Subtotal Personnel Expenses	\$447,354	\$574,807	\$725,840	\$923,400	\$279,000	30%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$120,000	\$0	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)		\$3,023	\$5,500	\$13,000	\$0	0%
Facilities (e.g. rent, utilities)	\$18,035	\$10,000	\$0	\$0	\$0	0%
Office Supplies	\$7,118	\$12,531	\$15,000	\$17,000	\$0	0%
Travel & Training	\$9,778	\$10,000	\$12,000	\$14,000	\$0	0%
Technology		\$16,128	\$20,000	\$25,000	\$15,000	60%
Other: Professional Services (e.g., Audit, HR)	\$50,342	\$143,117	\$95,000	\$95,000	\$50,000	53%
Other: Operations (e.g. bank fees, depreciation)	\$9,929	\$24,000	\$35,000	\$30,000	\$0	0%
Other: Insurance	\$10,114	\$20,000	\$30,000	\$35,000	\$0	0%
Other: Program-Client Direct	\$134,589	\$150,000	\$150,000	\$230,000	\$0	0%
Other: Gas, Maintenance and Mileage	\$0	\$14,193	\$15,000	\$20,000	\$6,000	30%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Other: Contract Staff	\$0	\$102,000	\$102,000	\$75,000	\$0	0%
Other: Fundraising		\$185	\$5,000	\$20,000	\$0	0%
Other: Special Events	\$154	\$1,000	\$1,000	\$20,000	\$0	0%
Subtotal Operating Expenses	\$360,059	\$506,177	\$485,500	\$594,000	\$71,000	12%
Total Expenditures	\$807,413	\$1,080,984	\$1,211,340	\$1,517,400	\$350,000	23%
Net Revenues	\$45,936	\$71,516	\$167,910	\$6,600		

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State			\$34,500	\$69,000
City Funding (financial partner and otherwise)	\$124,750	\$349,500	\$224,750	\$350,000
Mecklenburg County Funding	\$672,591	\$723,000	\$942,000	\$750,000
Foundation Grants & Funding	\$25,000	\$50,000	\$130,000	\$250,000
Donor Contributions	\$24,620	\$25,000	\$33,000	\$40,000
Service Fees				
Other Revenue	\$6,389	\$5,000	\$15,000	\$65,000
Total Revenues	\$853,350	\$1,152,500	\$1,379,250	\$1,524,000

Current Board of Directors

Laura Gorecki
Ken Griffin

Heidi Wilson
Meeka Clark

Ezio J. Palomeque

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FY 2027 Financial Partner Agency Summary

Housing Collaborative

Agency Description

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 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 2000 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 350 housing providers. These staff recruit housing providers willing to work with households we help place; assist households experiencing or at risk of homelessness who are referred to us by agency partners and City staff to find and secure housing; and check-in with property providers monthly to support housing retention.

Currently, the following local agencies refer clients to Housing Collaborative for housing placement assistance: City of Charlotte, Mecklenburg County, Salvation Army, Roof Above, Florence Crittenton Services, Safe Alliance, Charlotte Family Housing, Ada Jenkins Center, Freedom Fighting Missionaries, Families Forward Charlotte, Freedom Communities, Hearts for the Invisible, Time Out Youth, The Relatives, Supportive Housing Communities, Another Chance House of Refuge*, Erika's Closet*, YWCA*, and Just Do It Movement*.

*New partners added in the last year.

Current Financial Partner?

Yes

Agency Established

1999

FY 2027 Funding Request

\$200,000

FY27 Projected Overall Agency Budget	FY2027 Request	
\$13,383,200	\$200,000	1%

Funding Request Category

Overall Agency Budget

Total years financial partner with City of Charlotte

2

Funding History

FY2025	FY2026
\$200,000	\$200,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum	
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	Submitted - ✓
										Incomplete - ◇
										Not submitted - ✗

Application Scoring

Total Score: 92 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18-20 <i>Direct, compelling alignment</i>	14-17 <i>Clear alignment</i>	9-13 <i>General/indirect alignment</i>	0-8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	14	13-15 <i>Well-defined; outcome-connected</i>	10-12 <i>Clear; minor gaps</i>	6-9 <i>Underdeveloped</i>	0-5 <i>Vague/unrealistic</i>

Category	Max Points	Score	Excellent	Good	Fair	Poor
Impact & Performance Measures	20	18	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	14	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	13	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	4	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

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 the justice system, and/or previous housing instability including evictions or displacement. Currently, we are also assisting households displaced from Baymont Inn, to help them find permanent, stable, affordable rental housing.

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 such as past evictions, criminal justice system involvement, and/or use of a housing subsidy. Housing Collab places over 300 households in permanent rental housing each year.

Relocation Services - housing placement assistance specifically for people who are being displaced from housing due to hotel or property closures or sales, or mass property damage. To date, Housing Collaborative has helped over 200 households displaced from the Sterling community, Econo Lodge, JT Williams Apartments, Economy/Budget Inn, Magnolia Apartments, Speedway Inn, Tanglewood Apartments, and Lamplighter Inn to secure permanent housing, and we are actively assisting former guests of Baymont 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. In the past 12 months, we have been able to recruit 112 properties with over 1500 available and affordable units across Mecklenburg County.

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. In calendar year 2025 to date, Housing Collab has administered almost \$2.8M in housing-related financial assistance to help Charlotte-Mecklenburg residents access and retain housing. 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 183 households in units set-aside via the City- and County-funded Naturally Occurring Affordable Housing (NOAH) program at 10 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.

Strategies agency plans to implement to sustain the agency or program(s) in future years

We hope to use City funding to fill in the gaps not covered by the numerous grants that we administer, such as administrative positions, staff time spent in training, rent, office supplies, HR and finance services provided by Ascend Nonprofit Solutions (formerly Children & Family Services Center), and regular and federal annual audits. Prior to City Financial Partner funding, we have always had to fundraise to cover these costs. If we do not receive City funding this year or beyond one year, we would have to cover the expenses through a combination of fundraising and, if necessary, cost reduction. If fundraising is unsuccessful, the costs that would be reduced might include eliminating office space (going fully remote) or admin positions (answering direct calls from those searching for housing), or reducing the organization's contribution to employee benefits.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Increase access to housing for households that are homeless or at-risk.	Number of households we assisted to obtain a lease.	198 households placed into housing	300 households placed into housing.
Increase number of housing providers willing to accept households referred by Housing Collab.	Number of landlords signing their first leases with households referred by Housing Collab.	82 new housing providers	60 new housing providers.

Expedite the housing placement process.	Average days from referral to lease start date.	40% reduction	Reduce the average days from referral to lease start date by 5%.
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Overall Agency Budget

Expenditures FY 2024- FY 2026						Percent city request of overall budget
FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST		
Personnel						
Salaries	\$2,294,221	\$2,160,066	\$2,460,000	\$2,400,000	\$35,000	1%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$0	\$381,604	\$399,600	\$400,000	\$0	0%
Subtotal Personnel Expenses	\$2,294,221	\$2,541,670	\$2,859,600	\$2,800,000	\$35,000	1%
Operating						
Capital Equipment (computers)	\$0	\$14,400	\$14,400	\$15,000	\$3,750	25%
Communications (marketing to landlords)	\$53,366	\$72,000	\$90,000	\$66,000	\$18,000	27%
Facilities (rent)	\$155,648	\$106,595	\$116,011	\$120,000	\$39,000	33%
Office Supplies	\$19,263	\$18,380	\$18,380	\$20,000	\$0	0%
Travel & Training (mostly mileage to properties)	\$16,647	\$32,780	\$26,400	\$20,000	\$0	0%
Technology (50% is salesforce licenses)	\$73,115	\$89,815	\$95,091	\$100,000	\$30,000	30%
Other: Organizational Insurance	\$14,846	\$14,985	\$14,985	\$30,000	\$10,000	33%
Other: External Financial & HR Services including audits	\$213,844	\$178,351	\$187,700	\$144,000	\$64,000	44%
Other: Memberships & Fees	\$2,753	\$6,576	\$2,256	\$2,500	\$0	0%
Other: Licenses - Charitable Solicitation, Sec of State, etc.	\$657	\$700	\$700	\$700	\$250	36%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Other: Events	\$0	\$5,040	\$5,040	\$5,000	\$0	0%
Other: Depreciation	\$69,842	\$60,000	\$60,000	\$60,000	\$0	0%
Other:	\$0	\$0	\$0	\$0	\$0	0%
Subtotal Operating Expenses	\$619,981	\$599,622	\$630,963	\$583,200	\$165,000	28%
Financial Assistance (passthrough for clients)						
Arrears; upfront & ongoing housing costs; landlord incentives	\$3,287,661	\$3,296,004	\$10,749,372	\$10,000,000	\$0	0%
Subtotal Financial Assistance Expenses	\$3,287,661	\$3,296,004	\$10,749,372	\$10,000,000	\$0	\$0
Total Expenditures	\$6,201,863	\$6,437,296	\$14,239,935	\$13,383,200	\$200,000	1%
Net Revenues	-\$1,062,215	\$27,613	\$8,980	\$21,800		

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$1,026,674	\$3,650,000	\$11,155,200	\$11,000,000
City Funding (financial partner and otherwise)	\$0	\$200,000	\$200,000	\$200,000
Mecklenburg County Funding	\$546,956	\$1,129,533	\$1,499,928	\$1,500,000
Foundation Grants & Funding	\$3,265,050	\$1,275,476	\$1,090,787	\$500,000
Donor Contributions	\$6,263	\$3,000	\$3,000	\$5,000
Service Fees	\$273,487	\$194,400	\$300,000	\$200,000
Other Revenue	\$21,218	\$12,500	\$0	\$0
Total Revenues	\$5,139,648	\$6,464,909	\$14,248,915	\$13,405,000

Current Board of Directors

Bill Bolstad	Ivan Diaz-Campos	Alassane Diouf
Miriam Espallat	Mark Ethridge	Nicola Grant
Lonnie Harris	LaShonda Hart	Courtney Lundquist

Nic Mathais
Christina Metheney

Beverly McCluney
Megan Sadler

Tashika McKnight

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FY 2027 Financial Partner Agency Summary

Just Do It Movement! Inc.

Agency Description

The mission of Just Do It Movement!, Inc. is to educate, provide resources, and provide skills to individuals that will help them become self-sufficient while empowering them beyond their circumstances. Just Do It Movement! Inc. was founded in August 2020 by our Executive Director, Jessica Gibson, who has an extensive background in management and banking, so she knows how to lead a successful organization. Coupled with her experience, her willingness to serve on the front line makes her the right person to lead these efforts. She is a focused and principle-driven individual. Character and integrity are the hallmarks of all her personal and business relationships. She believes compassion, discipline, and organization cannot be compromised in building anything of substance. These are the very principles upon which Just Do It Movement! Inc. has been formed. Ms. Gibson was the primary wisdom behind launching our signature program, Housing Connect. We are committed to creating great neighborhoods and making a sustainable impact toward the self-sufficiency of Mecklenburg County, NC, residents, especially those experiencing housing insecurity.

Current Financial Partner?

Yes

Agency Established

2020

FY 2027 Funding Request

\$58,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$116,900	\$58,000	49%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

1

Funding History

FY2026
\$32,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 80 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	11	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	17	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	10	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	10	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	3	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

As of April 30, 2025, there were 2,415 people experiencing homelessness in Charlotte-Mecklenburg, an increase from the previous year. According to the City of Charlotte report (2024), the state of affordable housing in Mecklenburg County, NC, is characterized by a significant gap between housing costs and what low-to-moderate income households can afford. As a result, over 55,000 people in Charlotte need a place to live. Adding to that, the homeless population has difficulty locating apartments and housing they can afford. The Section 8 programs have extensive waitlists, and other landlords are private. These individuals are our target audience. The above conditions are why we do what we do through the Housing Connect Program.

Describe the activities that will be supported through requested city funding

In the Housing Connect Program, our wrap-around services components spearhead the preparation process for our constituents to connect to affordable housing, maintain independence, and become self-sufficient. Each component plays an integral role in making this project a success. The components we use are ID replacement, which includes obtaining vital documents, state IDs, birth certificates, and other government documentation needed to identify them appropriately when seeking housing; gainful employment, which includes job skills development; and financial literacy, including banking and household budgeting. Each component is used to ensure that participants are “housing-ready.”

If Just Do It Movement is granted the grant opportunity, we will assist ten families.

Our primary goals will be to assist five families with obtaining two forms of identifying documents to get them moved into housing. This will include the entire family size. Everyone in a household, including children, must have two forms of identifying documents to get approved for housing. Secondly, we will use our landlord pipeline to connect five additional families to permanent housing. We will also ensure that all five families' security deposits and first month's rent are covered for their affordable permanent housing opportunity.

With the remaining funds, we will maintain staff to expand our reach and increase the number of clients we serve year over year.

Strategies agency plans to implement to sustain the agency or program(s) in future years

Our sustainability plans include fee-for-service when providing this service to other organizations, fundraisers, community sponsors, and individual donations. We will round out our diverse revenue stream by seeking additional grant funding opportunities from local government agencies and foundations that align with our program objectives. Our board members are also required to “give or get” a gift each year that they are on the board.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Strengthen organizational capacity to deliver ID Replacement and Housing Connect services	Number of staff and contractors supported by grant funding	New Measure	2 employees and 2 contractors retained or hired
	Percentage of program staff retained for full grant year	New Measure	100% retention of key staff positions

Increase access to identification and vital documentation for individuals experiencing homelessness or reentry	Number of clients who receive state IDs, birth certificates, or Social Security cards	80 clients obtained necessary ID	375 individuals served annually
	Number of clients using documentation to secure housing or employment	30 clients secured employment	80% of participants
Expand housing navigation and support services through Housing Connect	Number of households assisted with housing navigation, deposits, or rent	80 clients served	20 households per year

Overall Program Budget

Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 BUDGET	FY 2026 PROJECTED BUDGET	FY 2026 CITY REQUEST	
Personnel					
Salaries	\$50,000	\$60,000	\$66,000	\$19,800	30%
Merit	\$0	\$0	\$0	\$0	0%
Benefits	\$0	\$0	\$0	\$0	0%
Subtotal Personnel Expenses	\$50,000	\$60,000	\$66,000	\$19,800	30%
Operating					
Capital Equipment (e.g. vehicles, computers)	\$13,000	\$4,500	\$4,600	\$860	19%
Communications (cellphone hotspots)	\$1,616	\$3,000	\$3,800	\$1,380	36%
Facilities (e.g. rent, utilities)	\$5,586	\$7,000	\$8,000	\$1,600	20%
Office Supplies	\$609	\$1,000	\$1,200	\$200	17%
Travel & Training	\$7,152	\$8,000	\$8,300	\$1,630	20%
Technology	\$500	\$1,000	\$1,500	\$1,000	67%
Insurance	\$1,578	\$1,600	\$1,850	\$1,500	81%
Copy / Printing	\$600	\$600	\$650	\$500	77%
Transporation	\$4,212	\$5,000	\$5,200	\$1,500	29%
marketing	\$4,259	\$5,000	\$5,500	\$1,500	27%
Website	\$2,000	\$2,500	\$3,000	\$300	10%
Accounting	\$7,155	\$6,000	\$6,500	\$650	10%
Bank fees	\$617	\$700	\$800	\$80	10%

Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 BUDGET	FY 2026 PROJECTED BUDGET	FY 2026 CITY REQUEST	
Subtotal Operating Expenses	\$48,884	\$45,900	\$50,900	\$12,700	25%
Total Expenditures	\$98,884	\$105,900	\$116,900	\$32,500	28%
Net Revenues	\$80,151	\$247,100	\$262,600		

Revenues			
	FY2024 Actual	FY 2025 Current Budget	FY2026 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0
Mecklenburg County Funding	\$15,000	\$20,000	\$25,000
Foundation Grants & Funding	\$55,000	\$60,000	\$65,000
Donor Contributions	\$3,929	\$5,000	\$5,500
Service Fees	\$48,699	\$115,000	\$120,000
Other Revenue	\$56,407	\$153,000	\$164,000
Total Revenues	\$179,035	\$353,000	\$379,500

Current Board of Directors

Isa Moore
Tiffany Barthelmy

Candace Canada
Tremika Woodley

Seddrick McCallum
Heb Wallace

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FY 2027 Financial Partner Agency Summary

Roof Above

Agency Description

Roof Above is North Carolina's most comprehensive homeless service provider. Serving more than 1,400 people every day across nine campuses, we provide for basic human needs when someone is in a housing crisis (three emergency shelters and a Day Services Center) and hundreds of units of supportive housing, primarily targeted towards our most vulnerable residents.

Current Financial Partner?

Yes

Agency Established

1994

FY 2027 Funding Request

\$127,182

FY27 Projected Overall Agency Budget	FY2027 Request	
\$23,306,175	\$127,182	1%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

1

Funding History

FY2026
\$100,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 100 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	20	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	15	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	20	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	15	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	15	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Roof Above serves people experiencing homelessness in the Charlotte-Mecklenburg community. Last year, we served more than 5,000 people and saw a more than 20% increase in the number of people served.

Describe the activities that will be supported through requested city funding

We are requesting funding to support our Day Services Center (DSC), a space specifically designed for people who are unsheltered to meet their basic needs outside of overnight shelter. Our DSC is open 365 days a year and provides regular meals, access to showers and laundry facilities, a mailing address and mail services to people without a stable address, access to telephones and nursing services, and supportive services that help people connect with identifying documents, emergency shelter, behavioral healthcare, and housing solutions. We serve on average more than 300 people daily, who are welcome on our site, providing a place for people who are unsheltered to go 7 days a week, along with critical services to meet human needs.

Strategies agency plans to implement to sustain the agency or program(s) in future years

Roof Above has a long history of impactful private fundraising. In fact, our Day Services Center, the focus of this grant application, has historically been completely supported through private philanthropy until in recent years through COVID funding we have received limited public funding. We have strategies around both planned giving and major gifts cultivation to grow our private fundraising goals. That being said, we believe our Day Services Center provides a tremendous public good, particularly for the Uptown community, and there is a place for public infrastructure funding.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Ensure people in housing crisis have access to meet basic human needed	Number of emergency shelter beds offered daily on average	540 beds	515 emergency shelter beds
	number of days Day Services Center open to our residents who are unsheltered	184 days	365 days
	Number of people served through three campuses of homeless services	1,556 people served	4,000 unique individuals
Connect people in a housing crisis to a housing solution	Number of people moved from homelessness to housing	225 people	475 people
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	564 served, 89% retention rate	600 people; 85% of tenants retain housing a year or longer

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$1,053,437	\$1,081,220	\$981,109	\$1,047,385	\$103,400	10%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$248,953	\$277,829	\$245,277	\$236,622	\$23,782	10%
Subtotal Personnel Expenses	\$1,302,389	\$1,359,049	\$1,226,386	\$1,284,007	\$127,182	10%
Operating						

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Capital Equipment (e.g. vehicles, computers)	\$20,910	\$18,000	\$21,000	\$21,630	\$0	0%
Communications (e.g. publishing, marketing)	\$7,036	\$5,900	\$6,500	\$6,695	\$0	0%
Facilities (e.g. rent, utilities)	\$123,780	\$159,620	\$167,945	\$172,983	\$0	0%
Office Supplies	\$20,234	\$3,450	\$6,000	\$6,180	\$0	0%
Travel & Training	\$0	\$0	\$0	\$0	\$0	0%
Technology	\$0	\$0	\$0	\$0	\$0	0%
Housing Assistance	\$113,552	\$120,000	\$48,540	\$49,996	\$0	0%
Client Services	\$30,073	\$32,170	\$28,385	\$29,236	\$0	0%
Professional Services (including contract staff)	\$34,247	\$45,838	\$138,997	\$143,167	\$0	0%
Food & Supplies	\$95,582	\$65,700	\$50,000	\$51,500	\$0	0%
Insurance	\$22,916	\$33,481	\$44,500	\$45,835	\$0	0%
Miscellaneous			\$103,041	\$106,132	\$0	0%
Subtotal Operating Expenses	\$468,330	\$484,159	\$614,908	\$633,355	\$0	0%
Total Expenditures	\$1,770,719	\$1,843,208	\$1,841,294	\$1,917,362	\$127,182	7%
Net Revenues	\$0	\$0	\$0	\$0		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner or otherwise)	\$0	\$0	\$100,000	\$125,000
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding	\$0	\$0	\$0	\$0
Donor Contributions	\$1,262,719	\$1,327,948	\$1,183,668	\$1,218,007
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$508,000	\$515,260	\$557,626	\$574,355

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Total Revenues	\$1,770,719	\$1,843,208	\$1,841,294	\$1,917,362

Current Board of Directors

- | | | |
|-------------------|--------------------|----------------|
| Rosie Krneta | Gray Dyer | Matt Miller |
| Greg Lewis | Elena Airapetian | Paula Bird |
| Ron Clark | Randy Franklin | David Goldberg |
| Reed Kracke | Deems May | Ellen Mark |
| Brent Martin | Joy Patterson | Mile Pranjic |
| Ashley Rogers | Chinette Stevenson | Glenn Stewart |
| Brent Torstrick | John Scott Trotter | Rufus Williams |
| Caroline Yingling | | |

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FY 2027 Financial Partner Agency Summary

Supportive Housing Communities

Agency Description

Our mission at Supportive Housing Communities (SHC) is to provide affordable housing to alleviate homelessness and human suffering. We accomplish this through a supportive housing model that combines affordable housing and wraparound services, such as case management, life skills education, and digital literacy training, to help our most vulnerable neighbors achieve stability, improve their health, and create pathways toward long-term independence.

SHC’s supportive housing programs advance the goals prioritized by the City of Charlotte’s Financial Partner program: creating great neighborhoods by expanding access to affordable housing; fostering safe communities by improving resident well-being and reducing crises; and promoting equitable opportunities by ensuring our most vulnerable neighbors can access the resources needed to thrive.

Current Financial Partner?

No

Agency Established

1993

FY 2027 Funding Request

\$1,000,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$5,218,996	\$1,000,000	19%

Funding Request Category

Overall Agency Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 86 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	20	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	13	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	15	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	11	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	14	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	3	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

SHC serves our neighbors in Charlotte experiencing chronic homelessness, those who have been unhoused for more than a year and who have at least one disabling condition, such as a serious mental illness, substance use disorder, a chronic disease, or a physical disability. These conditions make it nearly impossible for individuals to secure or maintain stable housing without assistance.

As of October 31st, 2025, 705 people were experiencing chronic homelessness in Charlotte. Individuals who identify as Black or African American account for 72% of the homeless population despite only comprising 33% of the city's total population. Our service population reflects this disparity, with 77% of our residents identifying as Black or African American, 11% as White (non-Hispanic), 8% as multi-racial, 2% as American Indian or Indigenous, 1% as Hispanic or Latino, and 1% as Asian.

Fifty percent of our residents identify as male, 49% as female, and 1% as Transgender or Non-Binary. Thirty-two percent are under the age of 18, 53% are between the ages of 18 and 64, and 6% are 65 and older.

For most of our residents, SHC is the last hope, every other option has been exhausted. These are people who have cycled through shelters, hospitals, and emergency rooms, or survived for years on the streets with no place to call home. Our approach creates a reliable support system, prevents repeated crises, reduces the strain on public services like emergency healthcare and law enforcement, and restores dignity to our neighbors who are too often overlooked.

Describe the activities that will be supported through requested city funding

A financial partnership with the City of Charlotte would sustain and strengthen SHC's supportive housing programs that enable our most vulnerable neighbors to overcome homelessness, achieve long-term stability, and build independence. City funding would directly provide affordable housing, case management, life skills education, digital literacy training, and community connections to approximately 500 individuals (264 households) each year.

Affordable Housing | A safe, affordable, and stable home allows our residents to focus on improving their health, reconnecting with family, and working toward goals. SHC provides affordable housing at McCreesh Place, our 91-unit abstinence focused, peer-supported community, and in scattered-site homes across Charlotte. Our properties team cultivates relationships with private landlords, prepares units for incoming residents, and ensures homes remain well-maintained. To make housing affordable, resident rent contributions are limited to 30% of household income, and SHC covers the remainder through public and private funds.

Case Management | Each household is paired with a case manager who provides consistent support and accountability through bi-weekly home visits. Case managers help residents work toward self-determined goals, navigate employment resources, and access educational opportunities, transportation assistance, and healthcare. These trusted relationships empower residents to rebuild confidence, follow treatment plans, and integrate with the community.

Life Skills Education | Many residents are living in a permanent home for the first time and benefit from support in budgeting, organization, communication, and conflict resolution. These foundational skills help residents manage their homes, build financial resilience, succeed in school or the workforce, and overcome everyday barriers that would otherwise threaten their stability.

Digital Literacy Training | Today, nearly every facet of life, from housing to employment, requires digital skills. Our Digital Literacy program teaches residents how to navigate online systems, apply for jobs, use email, and manage benefits. Through structured curriculum and laptop provision, we remove a major barrier to housing stability and economic mobility.

Community Engagement | Resident stability is strengthened through meaningful community engagement that mobilizes volunteers to address unmet needs and provide practical supports. SHC partners with dozens of corporate, civic, and faith-based organizations that contribute time, skills, and resources through hands-on service projects such as meal service, skill-building workshops, and financial literacy education. These volunteer-led efforts fill critical gaps, expand the circle of support around our residents, and foster meaningful connections that reinforce housing stability and overall well-being.

SHC is actively involved with the Charlotte-Mecklenburg Continuum of Care (CoC). Our staff serve on key CoC committees, including Coordinated Entry, Ranking, and the Homeless Management Information System Data Advisory Subcommittee, and cofacilitate weekly case conferencing to match families with appropriate housing programs. This active participation ensures SHC's programs complement, rather than duplicate, the broader network of services available to our neighbors experiencing homelessness.

SHC is deeply grateful for its partnership with Mecklenburg County, which covers a portion of rent and utilities for our residents, but all other supportive services and specialized interventions are solely funded by our agency. Funding from the City of Charlotte will directly sustain vital services by covering any remaining rental and utility costs, providing recovery and mental health support, offering job placement and transportation assistance, and leasing-related services such as landlord mediation and light property maintenance. These supports are often the difference between a family maintaining housing and slipping back into crisis.

Our programs strengthen the overall health and resilience of Charlotte and provide pathways of support to those who need them the most. An investment in SHC is an investment in stronger neighborhoods, places where residents have access to safe, affordable housing and the resources needed to remain housed. It is also an investment in a safer, healthier community, where preventable crises are reduced, emergency systems are less strained, and residents are connected to care before challenges escalate. SHC helps neighbors who face the greatest barriers find safety, rebuild their lives, and fully participate in the community.

Strategies agency plans to implement to sustain the agency or program(s) in future years

We recognize that sustaining the impact of our work beyond any one grant period requires diverse funding streams and partnerships. Our funding comes from a stable mix of revenue sources, including:

- Paid Rents: Residents are expected to contribute up to 30% of their income toward rent, which fosters a sense of responsibility and provides reliable revenue for SHC.
- Government Contracts: Subsidies from Mecklenburg County cover portions of rent that families cannot.
- Foundation and Corporate Grants: A robust pipeline of philanthropic support ensures the longevity of our programs and the organization.
- Corporate Sponsorships: Recruiting local businesses as sponsors helps to expand our operating reserve and deepen community engagement.
- Fundraising Events: Annual events such as Chefs of Charlotte, Warm Soles Night Walk, Neighbor of the Year, and the Brewers Ball raise unrestricted funds and increase awareness of our programs.

In recent years, SHC has taken deliberate steps to further strengthen its financial sustainability and operational efficiency. We have diversified revenue sources, expanded fundraising efforts, and invested in modernizing our data systems, staff training, and organizational infrastructure. Under the leadership of our CEO and management team, SHC is continuing to grow recurring donor programs, cause-marketing campaigns, and community partnerships. At the program level, we are also increasing the number of households who contribute a full 30% of their income to rent through targeted financial literacy supports.

Our Board of Directors and staff remain committed to cultivating new partnerships sources of support, ensuring that our programs remain strong and responsive to the needs of our community.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Housing Stability: Enable residents to remain stable housing through placement support, landlord mediation, and financial assistance.	Percentage of residents served who remain stably housed each year.	95% of 500 households
Mental Health Stability: Strengthen residents' mental health stability through consistent case management, access to behavioral health services, and individualized support plans.	Percentage of residents who have a diagnosed serious mental illness who do not use the emergency room for a mental health crisis for a full year.	95% of 500 households
Recovery from Substance Use: Support residents in maintaining recovery and reducing behaviors that place housing, health, or safety at risk.	Percentage of residents in recovery from substance use who do not relapse for a full year.	95% of 500 households

Overall Agency Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$1,588,320	\$1,676,914	\$1,633,882	\$1,682,898	\$320,000	19%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$267,718	\$344,256	\$276,350	\$284,641	\$48,500	17%
Subtotal Personnel Expenses	\$1,856,038	\$2,021,170	\$1,910,232	\$1,967,539	\$368,500	19%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$24,595	\$22,417	\$25,000	\$25,750	\$7,500	29%
Communications (e.g. publishing, marketing)	\$50,619	\$4,412	\$20,750	\$21,373	\$0	0%
Facilities (e.g. rent, utilities)	\$103,267	\$106,874	\$115,000	\$118,450	\$0	0%
Office Supplies	\$19,080	\$15,892	\$16,000	\$16,480	\$0	0%
Travel & Training	\$70,376	\$26,150	\$53,500	\$55,105	\$12,000	22%

Technology	\$10,471	\$7,303	\$7,700	\$7,931	\$0	0%
Other: Employee Expenses	\$29,085	\$31,970	\$52,864	\$54,450	\$12,000	22%
Other: Professional Fees	\$313,035	\$292,874	\$193,300	\$199,099	\$0	0%
Other: Admin & Office Fees	\$16,253	\$27,225	\$27,000	\$27,810	\$0	0%
Other: Insurance	\$44,285	\$47,481	\$54,500	\$56,135	\$0	0%
Other: Program Expenses	\$1,940,533	\$2,307,727	\$2,481,140	\$2,555,574	\$600,000	23%
Other: Interest, Therapy/Resident Adjustments	\$73,543	\$65,609	\$40,000	\$41,200	\$0	0%
Other: Special Events	\$16,179	\$43,808	\$70,000	\$72,100	\$0	0%
Subtotal Operating Expenses	\$2,711,321	\$2,999,741	\$3,156,754	\$3,251,457	\$631,500	19%
Total Expenditures	\$4,567,359	\$5,020,911	\$5,066,986	\$5,218,996	\$1,000,000	19%
Net Revenues	-\$147,620	-\$482,784	\$253,148	\$86,888		

	Revenues			
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY 2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner and otherwise)	\$10,000	\$0	\$0	\$1,000,000
Mecklenburg County Funding	\$2,616,925	\$2,781,339	\$3,333,134	\$2,333,134
Foundation Grants & Funding	\$620,668	\$608,634	\$715,000	\$807,750
Donor Contributions	\$154,267	\$74,184	\$100,000	\$105,000
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$1,017,879	\$1,073,970	\$1,172,000	\$1,060,000
Total Revenues	\$4,419,739	\$4,538,127	\$5,320,134	\$5,305,884

Current Board of Directors

Ryan Borg
 Ryan Ballew
 Fred Dodson
 Kimberly Kicklighter
 Lauren Spegal

Sherreka Tharps
 A. Carter Arey
 Duane Gregg
 Dennis LaCaria

Melissa Dunn
 Lakeyshia Davis
 Daniel Handel, MD
 Scott McMahon

FY 2027 Financial Partner Agency Summary

Frankie Mae Foundation

Agency Description

The Frankie Mae Foundation (FMF) is a Charlotte-based nonprofit dedicated to enriching communities by strengthening the well-being of family caregivers. The nonprofit was founded by Venitra White-Dean in memory of her mother, Frankie Mae Allen White. Venitra cared for her mother for almost 10 years while her mother lived with an Alzheimer's diagnosis. The organization was created to ensure that no caregiver navigates this journey feeling overwhelmed, isolated, or invisible.

Caregivers are the backbone of healthy and resilient communities. Their support allows many older adults to safely age in place, reduces strain on already overburdened healthcare systems, and preserves stability within families. Yet the demands of caregiving often lead to burnout, mental and physical exhaustion, financial hardship, and social isolation. FMF addresses this critical community need by providing free, accessible, and culturally responsive supports that uplift caregivers, strengthen households, and build connected, thriving neighborhoods.

FMF enriches the community through a comprehensive array of programs designed to reduce caregiver stress, increase access to resources, and create a strong sense of belonging. Our Monthly Meetups bring together more than 100 participants for fellowship, wellness activities, educational workshops, and on-site resource fairs featuring trusted community partners. The average attendance at these gatherings has more than tripled in three years, reflecting both the growing need and the deep sense of connection our programs foster.

To remove barriers to attending the Monthly Meetups, FMF pays for professional respite care so caregivers can safely leave their loved ones and take time for themselves. Since March 2023, we have funded 1,714 hours of respite, giving caregivers the opportunity to recharge and participate in community engagement.

We further enrich the community through additional wrap-around services, including:

- Mental health support through partnerships with licensed therapists.
- Grocery delivery through our community partner, Nourish Up, for households experiencing food insecurity.
- A Caregiver Store that provides essential supplies at no cost.
- Quarterly caregiver outings that promote joy, social connection, and cultural engagement.
- Male-only events that cultivate safe spaces for underserved male caregivers.
- Holiday and community service initiatives that support older adults and homebound residents across the City of Charlotte.

FMF's work creates a ripple effect of community enrichment. When caregivers are supported, families are stronger, older adults can often remain in their homes, and community networks deepen. Caregivers repeatedly tell us that FMF has given them hope, reduced their stress, and

restored meaningful social connections. Many continue participating even after their loved ones have passed away, showing the lasting impact of community belonging.

Our approach is intentionally collaborative. We partner with Mecklenburg County, local hospitals, home-care agencies, pharmacies, nonprofits, churches, and neighborhood organizations to ensure caregivers receive coordinated, high-quality support. These partnerships expand access to essential resources while fostering a more connected and resilient Charlotte.

The Frankie Mae Foundation exists to enrich our community by caring for the people who care for others. By emotionally, socially, and practically investing in caregivers, we strengthen families, neighborhoods, and the entire Charlotte region.

Current Financial Partner?

No

Agency Established

2021

FY 2027 Funding Request

\$29,860

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$225,375	\$29,860	13%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Financial Review	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 74 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	18	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	10	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	14	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	13	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	9	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	7	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	3	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

The Frankie Mae Foundation (FMF) directly serves unpaid family caregivers across Charlotte and the surrounding areas. These individuals provide essential care to aging adults, loved ones with disabilities, and family members with chronic or life-limiting conditions. In North Carolina, the scale of this population is significant. There are approximately 1.3 million North Carolinians who serve as unpaid family caregivers, providing more than 1.2 billion hours of care each year, with an estimated economic value of over \$13 billion annually. These caregivers form the backbone of the state’s long-term care system, often allowing older adults to remain in their homes and communities rather than entering institutional care.

Despite their critical contributions, caregivers in North Carolina face high levels of stress, burnout, and unmet needs. State data consistently show that unpaid caregivers experience higher rates of depression, financial strain, food insecurity, and physical health decline compared to non-caregivers. Nearly 60% of NC caregivers report at least one chronic health condition themselves, and many provide care for 20 or more hours per week, in addition to working full- or part-time jobs. FMF’s work is designed to meet these pressing needs at the community level, addressing the social, emotional, and economic challenges that caregivers in Charlotte navigate daily.

The caregivers who participate in FMF programs reflect the diverse range of caregiving experiences found across the city. They include adult daughters and sons caring for parents, spouses supporting partners, parents or grandparents caring for adult children, and kinship caregivers, who are extended family members or friends.

By serving unpaid caregivers, our work ensures that caregivers who give so much to others finally receive the support, community, and recognition they deserve.

Describe the activities that will be supported through requested city funding

With support from the City of Charlotte, the Frankie Mae Foundation (FMF) will expand two critical components of our caregiver engagement model. These two components are the quarterly social outings and the male-only caregiver outings. These activities are offered in addition to our well-established Monthly Meetups and are designed to further reduce caregiver stress, strengthen community connections, and provide meaningful, restorative experiences for our caregivers.

The quarterly social outings offer caregivers a chance to enjoy joy-filled, culturally enriching activities that are intentionally planned to restore emotional well-being. Family caregivers often spend their days caring solely for their loved one. As a result, leisure time is very limited. These outings give them structured, accessible opportunities to reconnect with themselves and the world around them.

City of Charlotte funding will allow FMF to host four social outings next year. The funding will cover admission or any associated fees, meals, supplies, respite, and staff support for the outings. These outings create space for relaxation and connection, but they also stimulate Charlotte's cultural and small business sectors, reinforcing the city's vision for a vibrant and inclusive community.

In addition to the quarterly social outings, City funding will also support a dedicated series of male-only caregiver outings. Male caregivers are a rapidly growing but under-recognized group in Charlotte and throughout North Carolina. Many male caregivers report feeling overlooked by traditional caregiver programs that are often female-focused or not designed to meet their needs.

FMF's male-only outings create safe, affirming environments where men can build community with peers who understand the unique pressures they face. These outings may include barbershop-style conversation circles, sporting events, game nights, group meals, outdoor recreation, or skill-based activities that foster connection without stigma. The goal is to provide a comfortable setting where men can talk openly, share coping strategies, and find camaraderie. Many male caregivers tell us this is the first time they've had a space where they feel seen, respected, and supported.

Strategies agency plans to implement to sustain the agency or program(s) in future years

The Frankie Mae Foundation (FMF) is committed to ensuring that our quarterly social outings and male-only caregiver outings continue well beyond the City of Charlotte's funding period. These programs have proven to be powerful tools for reducing caregiver stress, promoting social connection, and strengthening the overall well-being of unpaid caregivers. To maintain these offerings in the future, FMF will implement a comprehensive sustainability plan that combines diversified fundraising, strong community partnerships, operational efficiencies, and intentional involvement of our Fundraising Committee.

One of the primary strategies for sustaining these outings is expanding FMF’s revenue streams beyond city funding. We will continue to pursue private and family foundation grants as well as target regional and national foundations that prioritize aging-in-place, caregiver support, mental health, social isolation reduction, and community enrichment. Some of these funders include the Duke Endowment, AARP, Humana Foundation, and the Alzheimer’s Association to secure multi-year support for caregiver engagement activities. We will resume sponsorship opportunities for local businesses, such as local banks, healthcare systems, senior-care agencies, restaurants, and entertainment venues, to underwrite individual outings or become annual partners. Sponsorships include recognition opportunities, cross-promotional visibility, and participation opportunities for corporate volunteers. Every November, during National Family Caregivers Month, we launch our annual end-of-year fundraising campaign to secure funds for the upcoming year. This campaign highlights caregiver stories, celebrates our community’s resilience, and invites donors and partners to invest in sustaining programs such as our quarterly outings and male-only events. We will grow our monthly donor circle, allowing supporters to “sponsor a caregiver outing” each season will create a structured giving pathway.

We will also strengthen our in-kind and community partnerships by leveraging them to reduce program costs and increase sustainability. Restaurants, cultural venues, museums, theaters, bowling centers, and sports organizations may provide reduced rates or complimentary admission in exchange for community engagement exposure. Partnerships with senior-care agencies, hospitals, and therapy groups may include sponsoring meals or providing respite at a non-profit rate.

The Fundraising Committee plays a strategic role in creating and fostering long-term sustainability efforts. They will continue to identify potential sponsors and initiate outreach to businesses aligned with caregiver support, develop fundraising events, assist in drafting and reviewing grant proposals, create targeted donor communication and track donor engagement data, and maintain stewardship practices to encourage repeat giving.

We will continue collecting data on caregiver participation, stress reduction, satisfaction, and long-term engagement. These metrics will strengthen future grant applications, provide compelling material for donor campaigns, and validate the outcomes achieved through City-supported outings.

Through diversified funding, community partnerships, and active leadership from the Fundraising Committee, we will ensure that quarterly social and male-only outings remain a long-standing, sustainable part of our caregiver support programming.

Performance Measures and Targets

Objective	Measure	FY2027 Target
By the end of the grant period, caregivers participating in social outings will report reduced feelings of isolation and increased sense of belonging within the Charlotte community.	We will conduct pre and post-event surveys with the caregivers. We will also track attendance, as there is a direct correlation with high attendance rates and reduced feelings of isolation as well as	Our goal is that at least 85% of the caregivers will report reduced feelings of isolation and increased sense of belonging after the events.

Objective	Measure	FY2027 Target
	Increased sense of belonging	
Caregivers will report that the social outings allowed them to engage in Charlotte's cultural, recreational, or social spaces in ways they would not otherwise access due to caregiving responsibilities and/or financial constraints	We will conduct surveys with the caregivers	Our goal is that at least 85% of the caregivers will report they were able to attend events they would not otherwise be able to attend
Caregivers will report improved overall quality of life, including increased joy, stress relief and emotional well-being, as a direct result of participation in the social events	We will conduct pre and post-event survey with the caregivers. We will also track attendance. Regular attendance allows for relationship building, social interaction and sense of connection, thereby improving the quality of life	Our goal is that at least 85% of the caregivers report improved quality of life
We will deliver one community-based social outing per quarter (for all caregivers) and one community-based outing per quarter (for men only), ensuring year-round opportunities for the caregivers	We will create a social events calendar and track attendance	Our goal is an average of 35 caregivers attending each outing (for all caregivers) and an average of 20 men caregivers attending each outing specified for them

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$36,000	\$34,875	\$42,500	\$42,500	\$0	0%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$0	\$0	\$0	\$0	\$0	0%
Subtotal Personnel Expenses	\$36,000	\$34,875	\$42,500	\$42,500	\$0	0%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)	\$876	\$688	\$4,500	\$4,725	\$0	0%
Facilities (e.g. rent, utilities)	\$11,616	\$13,223	\$15,250	\$16,013	\$360	2%
Office/Program Supplies	\$1,502	\$1,509	\$6,900	\$7,245	\$700	10%
Travel & Training	\$910	\$2,356	\$5,200	\$5,460	\$0	0%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Reserves	\$0	\$0	\$30,000	\$31,500	\$0	0%
Other: Respite during Meetups	\$14,943	\$22,375	\$36,300	\$39,239	\$13,500	34%
Other: Food during Meetups	\$17,196	\$15,074	\$18,000	\$18,900	\$4,000	21%
Other: Caregiver Store/Bereavement Gifts	\$31,177	\$14,555	\$18,250	\$19,163	\$0	0%
Other: Professional Fees (Accounting, Marketing, Facilitators)	\$25,053	\$26,687	\$27,200	\$28,560	\$5,500	19%
Other: Insurance & Taxes	\$4,844	\$4,738	\$6,230	\$6,542	\$0	0%
Other: Dues & Subscriptions	\$4,112	\$4,409	\$5,266	\$5,529	\$0	0%
Other: Activity Fees (Admission to events)	\$0	\$0	\$0	\$0	\$5,800	0%
Subtotal Operating Expenses	\$112,229	\$105,614	\$173,096	\$182,875	\$29,860	16%
Total Expenditures	\$148,229	\$140,489	\$215,596	\$225,375	\$29,860	13%
Net Revenues	\$19,048	\$59,892	\$0	\$0		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner or otherwise)	\$0	\$0	\$0	\$29,860
Mecklenburg County Funding	\$0	\$0	\$0	\$43,515
Foundation Grants & Funding	\$87,460	\$144,348	\$130,596	\$72,000
Donor Contributions	\$26,057	\$26,634	\$30,000	\$30,000
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$53,760	\$29,399	\$55,000	\$50,000
Total Revenues	\$167,277	\$200,381	\$215,596	\$225,375

Current Board of Directors

Ardise White-Black
Elizabeth Hardin

Allan Azali
Henrico White

Brian Rann
Tara Chance

Dee Jetton

Melinda Henderson

Mikel Brown

Safe Communities

OUTCOME

Ensuring neighborhoods are safe, healthy, and inclusive with a focus on policing, fire protection and community relations.

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FY 2027 Financial Partner Agency Summary

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 multiple 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 and the MLB Players Alliance. 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.

Current Financial Partner?

Yes

Agency Established

2011

FY 2027 Funding Request

\$50,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$179,000	\$50,000	28%

Funding Request Category

Overall Agency Budget

Total years financial partner with City of Charlotte

3

Funding History

FY2024	FY2025	FY2026
\$50,000	\$50,000	\$50,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
✓	✓	✓	✓	◇	✓	✗	✗	✗	✓

Submitted - ✓
 Incomplete - ◇
 Not submitted - ✗

*2024 Audit not provided

Application Scoring

Total Score: 83 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	18	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	13	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	15	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	12	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	12	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	8	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

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 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 (tBall thru age 12).

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 last three Fiscal Years. For this 2027 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 on teams and using baseball as a vehicle to advance educationally, particularly in reading literacy for elementary school students) and growing life skills in youth, so the orientation of the organization and deployment of incremental funds is intended to be in support of people from minority communities representing the organization and engaging with families and the community, on and off the field, and their impact on players and families. In earlier years, our ability to invest in people (after covering required operational cost) had 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 and have continued to significantly leverage volunteer resources over the last few years, 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 three years 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 recognize that long-term sustainability (without reliance on the City of Charlotte or any short-list of donors) is very important. 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 age group, 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 process, and implementing tools/systems that will improve the scale and durability of the funding model.

Strategies agency plans to implement to sustain the agency or program(s) in future years

Here are two major sources of revenue that offset operating expenses: 1. Player Participation Fees (10%), this is intentionally kept low to avoid creating a barrier to entering and sustaining participation; 2. Benevolent contributions, grants and sponsorships (90%), this includes some recurring contributions (annually for multiple years) and other one-time donations. To date, we have focused development efforts on building relationships with local businesses and benevolent families/individuals and have avoided the expense related to costly fund-raising events. As the number of participants increase, the participation fees will naturally increase but since they are intentionally targeted to be low and below market, will not offset full cost to serve. As we prepared

budgets for 2027 we did not assume the funding as a financial partner would be received for another year, and we will therefore continue to focus on increasing the level of benevolent contributions (through individuals and corporations/organizations) and corporate sponsorships of teams (we have exceeded \$100,000 in contributions/sponsorships each of the last five years, and will strive to sustain and elevate that in the coming year(s)). We will gratefully receive and effectively deploy funds at the same or increased level if received for another year but will have contingency plans to sustain programming impact if we are not retained as a financial partner.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Growth	Growth in the number of players as a measure of reach and impact	256	350
Reading Levels	% of K-5 students reading at Grade Level as measured by internal assessment and/or school EOG	Year-end Measure	90% Vocabulary 80% Comprehension 90% HF Words 80% Fluency
Family Engagement	% of families engaged (consistent participation in practices, games, and community/family events)	Year-end Measure	80%
Career Pathways	% of seniors graduating from high school and progressing to college (2yr/4 yr) or vocation (i.e. construction; military)	Year-end Measure	95%
Minority Participation	% of players from African American and Hispanic communities	98%	90%

Overall Agency Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$76,937	\$91,802	\$110,750	\$115,000	\$50,000	43%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$0	\$0	\$0	\$0	\$0	0%
Subtotal Personnel Expenses	\$76,937	\$91,802	\$110,750	\$115,000	\$50,000	43%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)	\$3,400	\$3,656	\$1,000	\$1,000	\$0	0%
Facilities (e.g. rent, utilities)	\$0	\$5,000	\$5,000	\$5,000	\$0	0%
Office Supplies	\$2,385	\$5,764	\$5,699	\$5,000	\$0	0%
Travel & Training	\$0	\$30,043	\$20,000	\$10,000	\$0	0%
Technology	\$0	\$350	\$0	\$0	\$0	0%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Auto/Travel	\$29,339	\$1,590	\$1,000	\$1,000	\$0	0%
Accounting/Audit	\$11,070	\$7,751	\$7,700	\$8,000	\$0	0%
Uniforms/Equipment	\$13,708	\$19,188	\$13,000	\$7,500	\$0	0%
League Fees/Umpires	\$8,405	\$7,284	\$8,000	\$9,000	\$0	0%
Insurance (GL, Auto, Player, D&O)	\$4,050	\$8,284	\$8,388	\$7,000	\$0	0%
Charitable Contributions	\$6,500	\$2,658	\$0	\$0	\$0	0%
Meals/Entertainment/Family Events	\$3,579	\$11,521	\$11,000	\$7,500	\$0	0%
Miscellaneous	\$5,950	\$10,652	\$3,300	\$3,000	\$0	0%
Subtotal Operating Expenses	\$88,386	\$113,741	\$84,088	\$64,000	\$0	0%
Total Expenditures	\$165,322	\$205,544	\$194,838	\$179,000	\$50,000	28%
Net Revenues	-\$4,191	-\$15,076	-\$49,838	\$46,000		

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner and otherwise)	\$0	\$49,637	\$50,000	\$50,000
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding	\$92,564	\$22,813	\$25,000	\$50,000
Donor Contributions	\$18,568	\$100,000	\$50,000	\$100,000
Service Fees	\$50,000	\$18,018	\$20,000	\$25,000
Total Revenues	\$161,131	\$190,468	\$145,000	\$225,000

Current Board of Directors

Bob Szymkiewicz
 Pepper Pounds
 Joel Matthews

Alan Barnes
 Jamall Kinard

Dee White
 Morris Madden

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FY 2027 Financial Partner Agency Summary

For The Struggle

Agency Description

For The Struggle, Inc. (FTS) is a community driven non-profit organization located in Charlotte, NC that focuses on fighting systemic issues of racial and social injustice with and for Black communities. FTS was founded in 2019 with the following three focus areas: (1) Community Response Team that houses FTS's annual Juneteenth Celebration on Charlotte's historically black corridor and FTS's Elder Response Initiative that offers free resources and services to protect senior citizens and their families to create and maintain generational wealth, economic mobility and affordable housing; (2) The Eatmon Project that focuses on educating and engaging black voters; and (3) SaluteU Program that offers free services and resources to youth involved in the criminal system or engaging in activities that tend to lead to involvement with the criminal system.

Current Financial Partner?

Yes

Agency Established

2019

FY 2027 Funding Request

\$150,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$1,161,700	\$150,000	13%

Funding Request Category

Overall Agency Budget

Total years financial partner with City of Charlotte

3

Funding History

FY2024	FY2025	FY2026
\$100,000	\$100,000	\$100,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 82 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	18	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	13	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	16	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	9	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	13	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	3	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

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 an equitable focus on seniors in historically and predominately black neighborhoods to provide equitable solutions to housing and food insecurity issues. In 2024, FTS served more than 300 seniors and delivered a variety of free services through its Elder Response Initiative.

Second, the SaluteU Project serves youth involved with the criminal system or engaging in activities that tend to lead to involvement with the criminal system.

Note: FTS also serves black voters through its Eatmon Project.

Describe the activities that will be supported through requested city funding

Your funding will support the free services offered to senior citizens, which include, but are not limited to (1) future planning (e.g. wills, trusts, Powers of Attorney, financial education to families); (2) assistance with applying for property tax relief; (3) critical home repairs and/or ADA modifications; (4) access to legal representation for property-related issues; (5) healthy cooked meals and groceries for seniors living on the Beatties Ford Road and West Blvd Corridors; (6) environmental friendly upgrades to seniors' homes to reduce utility costs; and (7) assistance with Activities of Daily Living such as taking medication, taking out trash, yard work and more.

Your funding will also support the SaluteU Program, which is an all-encompassing program that provides resources to youth ages 14 to 18 who are involved in the criminal system or engaging in activities that tend to lead to involvement in the criminal system. In response to needs identified by the youth engaged thus far, the SaluteU Program offers the following services:

- 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.
- Weekly courses on conflict management, financial planning and career readiness.
- Exposure to careers and trades available upon graduation.
- Free weekly boxing classes and conflict management sessions at Stokes Boxing Academy.
- Weekly employment and workforce development opportunities paying \$20.00 per hour.
- Academic support and tutoring; and
- Therapy and mental health services as needed

Finally, your funding will also support the management, and general oversight, and financial management and oversight of these programs via support for the Executive Director and Deputy Director salaries.

Strategies agency plans to implement to sustain the agency or program(s) in future years

FTS's sustainability plan has proven successful throughout the years. FTS intends to continue to:

1. Host annual fundraisers. Such fundraisers include, but are not limited to, FTS's Annual Benefit Gala and Silent Auction and other annual fundraisers such as FTS's Giving Circle that generates recurring dollars every month from private donors.
2. Continue to apply for contracts with governmental entities such as the County, State and Federal Government (e.g. HUD);

3. Market FTS's program to local businesses such restaurants and churches to receive in-kind donations (e.g. food for the children and for Senior Feeding Program); and

4. FTS recognizes that partnerships and meaningful relationships are imperative to continue to support its programming. As such, FTS will continue to sustain its work moving forward by continuing to foster partnerships and meaningful relationships with funders and other local organizations to ensure we have the resources necessary to continue to maintain and build upon each program. FTS will also sustain by maintaining and pursuing diverse revenue streams in general.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
It is FTS's objective to combat displacement and decrease the racial disparities in economic mobility/opportunity and generational wealth between black and white residents in Charlotte-Mecklenburg by helping preserve existing affordable housing in historically and predominately black communities via free home repairs, environmental-friendly upgrades, property tax relief and future planning (e.g. wills and trusts).	FTS measures its outcomes and impact by utilizing its current secure electronic system that tracks all seniors it serves in any capacity. FTS will also continue to obtain written and recorded testimonials from seniors served to have even more meaningful feedback regarding the Elder Response Initiative from the people directly impacted by the program.	63 repairs completed	(1) Complete critical home repairs for 30 seniors
		36 future planning documents completed	Complete 50 future planning documents for seniors, including at least 15 trusts that will ensure homes are passed down through generations
		75 seniors assisted saving \$72,557 in property tax	Assist 50 seniors with property tax relief
		203 seniors fed 2 times per week	Maintain FTS's senior feeding program that feeds 203 seniors twice a week on the Beatties Ford Road, West Boulevard and South Hoskins corridors

Overall Agency Budget

Expenditures FY 2024- FY 2027						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$210,111	\$267,958	\$365,000	\$365,000	\$75,000	21%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$31,244	\$58,114	\$75,000	\$75,000	\$0	0%
Subtotal Personnel Expenses	\$241,355	\$326,073	\$440,000	\$440,000	\$75,000	17%
Operating						
Contractors	\$27,622	\$39,726	\$75,000	\$75,000	\$25,700	34%

Expenditures FY 2024- FY 2027						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Legal and Professional Fees	\$0	\$7,275	\$8,000	\$8,000	\$0	0%
Furniture and Equipment	\$513	\$1,838	\$1,500	\$1,500	\$0	0%
Advertising and Marketing	\$985	\$4,062	\$10,000	\$10,000	\$0	0%
Bank Charges and Fees	\$193	\$585	\$500	\$500	\$0	0%
Mortgage		\$6,200	\$20,000	\$20,000	\$0	0%
Truck and Car	\$1,687	\$2,919	\$20,000	\$20,000	\$0	0%
Insurance	\$11,536	\$23,367	\$30,000	\$30,000	\$0	0%
Copy and Printing	\$79	\$418	\$500	\$500	\$0	0%
Memberships/Dues/ Subscriptions		\$7,028	\$4,000	\$4,000	\$10,000	0%
Office Supplies	\$36	\$6,075	\$10,000	\$10,000	\$0	0%
Safety and Security Services		\$769	\$1,000	\$1,000	\$0	0%
License and Permits	\$60	\$371	\$500	\$500	\$0	0%
Program Expenses	\$454,256	\$502,409	\$500,000	\$500,000	\$30,000	6%
Rent/Mortgage	\$13,950	\$10,131	\$20,000	\$20,000	\$9,300	47%
Repairs & Maint	\$189	\$16,461	\$2,500	\$2,500	\$0	0%
Shipping and Delivery	\$88	\$1,089	\$1,200	\$1,200	\$0	0%
Internet and Telephone	\$4,282	\$6,425	\$7,000	\$7,000	\$0	0%
Staff Training and Development	\$600	\$684	\$1,000	\$1,000	\$0	0%
Utilities	\$1,854	\$3,519	\$5,000	\$5,000	\$0	0%
Technology/Websites		\$288	\$500	\$500	\$0	0%
Travel	\$1,961	\$802	\$3,500	\$3,500	\$0	0%
Subtotal Operating Expenses	\$519,890	\$642,443	\$721,700	\$721,700	\$75,000	10%
Total Expenditures	\$761,245	\$968,515	\$1,161,700	\$1,161,700	\$150,000	13%
Net Revenues	\$867,579	\$531,485	\$338,300	\$338,300		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget

Government Grants & Funding - Federal/State	\$0	\$229,992	\$0	\$0
City Funding (financial partner or otherwise)	\$148,250	\$180,984	\$0	\$0
Mecklenburg County Funding	\$151,437	\$25,961	\$0	\$0
Foundation Grants & Funding	\$1,001,167	\$1,293,967	\$1,500,000	\$1,500,000
Donor Contributions	\$308,639	\$280,524	\$0	\$0
Product Sales	\$1,493	\$1,405	\$0	\$0
Other Revenue	\$17,838	\$33,755	\$0	\$0
Total Revenues	\$1,628,824	\$2,046,589	\$1,500,000	\$1,500,000

Current Board of Directors

Kayla Loney	Rayon Boxx	Dr. Austrai Bradley
Brittany Hillman	Reginald Swann	Ricky Watson, Esq.
Elliot Dolby-Shields, Esq.	Charles Hands, III. Esq.	Derrick Walker

FY 2027 Financial Partner Agency Summary

My Brother's Keeper Charlotte-Mecklenburg

Agency Description

My Brother's Keeper Charlotte-Mecklenburg is a specialized nonprofit organization dedicated to improving life outcomes for boys and young men of color between the ages of 12 and 24. The agency operates as a backbone organization, utilizing a collective impact model to coordinate a network of cross-sector partners throughout the Charlotte-Mecklenburg community.

The agency's work is organized around three central "Portfolios" driven by comprehensive data to ensure targeted intervention and support. Their primary goal is to dismantle barriers to success and enhance economic mobility, social capital, and career opportunities for historically marginalized youth.

Current Financial Partner?

Yes

Agency Established

2021

FY 2027 Funding Request

\$115,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$443,900	\$115,000	26%

Funding Request Category

Overall Agency Budget

Total years financial partner with City of Charlotte

4 years

Funding History

FY2024	FY2025	FY2026
\$50,000	\$50,000	\$50,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
X	✓	✓	✓	X	X	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - X

Application Scoring

Total Score: 80 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	15	18-20 <i>Direct, compelling alignment</i>	14-17 <i>Clear alignment</i>	9-13 <i>General/indirect alignment</i>	0-8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	15	13-15 <i>Well-defined; outcome-connected</i>	10-12 <i>Clear; minor gaps</i>	6-9 <i>Underdeveloped</i>	0-5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	15	18-20 <i>Measurable outcomes; realistic targets</i>	14-17 <i>Adequate; mostly outcome-focused</i>	9-13 <i>Output-focused; limited detail</i>	0-8 <i>Unclear/missing</i>
Financial Health & Budget	15	9	13-15 <i>Complete; strong controls</i>	10-12 <i>Generally sound</i>	6-9 <i>Budget unclear</i>	0-5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	11	13-15 <i>Strong leadership & policies</i>	10-12 <i>Adequate; minor gaps</i>	6-9 <i>Capacity concerns</i>	0-5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9-10 <i>Clear need; underserved focus</i>	6-8 <i>Need defined; limited data</i>	3-5 <i>Broad; limited justification</i>	0-2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3-4 <i>Partial diversification</i>	1-2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

My Brother's Keeper Charlotte-Mecklenburg serves a critical and specific demographic: boys and young men of color, between the ages of 12 and 24, who reside within the City of Charlotte and Mecklenburg County.

While the agency's reach is county-wide, its strategic focus is hyper-localized toward the City of Charlotte's six Corridors of Opportunity. These areas, which include Beatties Ford/Rozzelles Ferry, West Boulevard, Freedom/Wilkinson, North Tryon/Graham, Sugar Creek/I-85, and Central/Albemarle, represent communities that have historically faced systemic disinvestment and barriers to upward mobility.

Describe the activities that will be supported through requested city funding

The requested city funding enables My Brother's Keeper Charlotte-Mecklenburg to provide critical experiential opportunities that bridge the gap between academic learning and career success for young men of color. Central to this activity is the agency's "Real World Engagement" portfolio, which coordinates career-readiness initiatives designed to build social capital and professional skills. Through these funds, the agency facilitates access to diverse pathways such as the Harvey B. Gantt Center's youth residencies and local business internships, offering students hands-on exposure to industries like technology, business development, and the arts.

The agency utilizes its extensive database of 25,000 students to identify and place youth in these high-impact roles, ensuring that those living in the Corridors of Opportunity have priority access to professional mentorship and local workforce networks. These opportunities are not limited to traditional corporate settings but include vocational shadowing, community-based projects, and leadership workshops that empower youth to envision themselves as future leaders within their own neighborhoods. By funding the administrative and coordination costs of these placements, the city ensures that MBK can maintain its commitment to providing 1000 direct experiential opportunities annually, effectively creating a sustainable pipeline from school to meaningful employment.

Strategies agency plans to implement to sustain the agency or program(s) in future years

My Brother's Keeper Charlotte-Mecklenburg maintains a robust sustainability strategy centered on diversifying revenue streams to ensure the long-term continuation of its youth-focused portfolios and the Youth Services Connection Hotline. The agency is beginning to actively pursue a multi-year grant commitments from prominent philanthropic organizations like the Foundation For The Carolinas and the United Way of Greater Charlotte, aligning its mission with regional economic mobility goals to secure consistent funding. To support the experiential opportunities and internships provided to young men of color, the agency cultivates deep corporate partnerships that include both financial sponsorships and in-kind professional support from Charlotte's business sector.

Beyond local support, the agency is expanding its reach by seeking federal and state funding opportunities specifically dedicated to workforce development and social capital initiatives for marginalized populations. The agency also implements a recurring individual giving program that leverages its high performance metrics and community impact data to attract sustainable private donations. By positioning itself as a backbone organization within a collective impact model, the agency is exploring fee-for-service opportunities where it can provide technical assistance and data-driven consulting to other regional partners. This multifaceted approach ensures that the vital

social infrastructure and the network of over 6,000 partners remain operational regardless of fluctuations in any single funding source.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Support the development of youth programming in neighborhoods in the city of Charlotte.	By June of 2027, we will have grown our partnership database to 60 entities served by My Brother's Keeper Charlotte-Mecklenburg.	54 entities	60 entities
Support the development of youth programming in neighborhoods in the city of Charlotte.	By June of 2027, we will have at least a 92% satisfaction rate from our entities served by My Brother's Keeper Charlotte-Mecklenburg.	90% satisfaction rate	92% satisfaction rate
Support the development of youth programming in neighborhoods in the city of Charlotte.	By June of 2027, we will have grown our youth database to 2,500 students within Charlotte-Mecklenburg county.	2,378 students	2,500 students
Increase Hotline Utilization	Number of calls received by the Youth Services Connection Hotline	1,430 calls	2,000 calls
Enhance Referral Effectiveness	Percentage of calls resulting in successful referrals	87% referral success rate	85% referral success rate

Overall Agency Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$225,000	\$225,000	\$285,000	\$300,000	\$65,000	22%
Merit	\$0	\$2,000	\$3,000	\$3,200	\$0	0%
Benefits	\$36,250	\$42,500	45,000	\$46,500	\$2,000	4%
Subtotal Personnel Expenses	\$261,250	\$269,500	\$333,000	\$349,700	\$67,000	19%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$3,000	\$8,000	\$15,000	\$15,000	\$0	0%
Communications (e.g. publishing, marketing)	\$5,000	\$6,000	\$15,000	\$19,500	\$12,500	64%
Facilities (e.g. rent, utilities)	\$0	\$0	\$25,000	\$25,000	\$14,500	58%
Office Supplies	\$500	\$500	\$4,000	\$6,700	\$3,000	45%
Travel & Training	\$3,000	\$4,500	\$15,500	\$15,500	\$11,200	72%
Technology	\$500	\$1,500	\$5,000	\$12,500	\$6,800	54%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Subtotal Operating Expenses	\$12,000	\$20,500	\$79,500	\$94,200	\$48,000	51%
Total Expenditures	\$273,250	\$290,000	\$412,500	\$443,900	\$115,000	26%
Net Revenues	\$6,250	\$65,000	\$72,500	\$41,100		

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$50,000	\$50,000	\$75,000	\$75,000
City Funding (financial partner and otherwise)	\$50,000	\$50,000	\$115,000	\$115,000
Mecklenburg County Funding	\$0	\$0	\$35,000	\$35,000
Foundation Grants & Funding	\$25,000	\$35,000	\$25,000	\$25,000
Donor Contributions	\$2,500	\$10,000	\$15,000	\$15,000
Service Fees	\$152,000	\$210,000	\$220,000	\$220,000
Total Revenues	\$279,500	\$355,000	\$485,000	\$485,000

Current Board of Directors

- | | | |
|---------------|----------------|-----------------|
| Ricky Jones | Jorge Millares | Kenneth Burton |
| Eric Lewis | Keith Cockrell | Braxton Winston |
| Mark Jerrell | Frank Barnes | Anthony Trotman |
| Raki McGregor | Reginald Bean | |

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FY 2027 Financial Partner Agency Summary

Parent Child+

Agency Description

A child born today has just 1,800 days to prepare for kindergarten. According to recent U.S. Census Bureau data, approximately 4 million children ages five and under in the United States live below the federal poverty line¹, placing them at greater risk of lacking the resources and opportunities needed to enter school prepared for success. Students who start behind often struggle to catch up and face significantly higher risks of ongoing academic challenges or dropping out altogether.

ParentChild+ is an internationally recognized early childhood organization founded in 1965 and incorporated as a 501(c)3 in 1979, dedicated to ensuring that all children, regardless of race, socio-economic status, language, or zip code, have equal possibilities from the start. We partner with families, caregivers, and communities to build early literacy, strengthen parent-child interaction, and lay the foundation for long-term school readiness and academic success.

ParentChild+ delivers two evidence-based/supported home visiting models that reach families with and home based child care providers caring for children during the critical ages of 18 months to 4 years old. Our trained Early Learning Specialists (many of whom are former program participants and culturally and linguistically representative of the communities in which they work) visit families and providers twice weekly, modeling high-quality verbal interaction, play-based learning, and early literacy practices. Each week includes a new, culturally relevant book or educational toy that is a gift to the family or provider for the child care setting.

Nationally, ParentChild+ operates 142 sites (123 U.S. sites and 19 international) in historically marginalized, under-resourced communities. In each community, we partner with a local implementation agency, such as community-based organizations, social service agencies, health centers, and school districts, to deliver the program. The ParentChild+ National Center provides training, technical assistance, and quality assurance to ensure faithful replication, consistent high-quality services, and strong outcomes. The National Center also expands the program's reach by cultivating new partners, enhancing curriculum, and strengthening wraparound supports that address poverty-related stressors including food insecurity, health needs, trauma response, counseling, respite care, and housing. Local partners receive continuous training and updated curriculum via a robust learning management system with online training, webinars, updated program forms, and family resources.

Since launching in Charlotte in 2020, ParentChild+ has partnered with Inlivan and Charlotte Bilingual Preschool in Mecklenburg County, and with Families First in Cabarrus County. While partnerships with Inlivan and Charlotte Bilingual Preschool have concluded, Families First remains a core partner, and in 2024 we expanded through a new partnership with Alliance for Children in Mecklenburg County. This evolution enables us to serve neighborhoods where school readiness gaps and economic mobility barriers are greatest.

To date, 166 Charlotte-area families have graduated from the program. In FY23 alone, we served 220 families and nine home-based child care providers across Mecklenburg and Cabarrus counties, and last year we worked with 100 families across both models.

ParentChild+ aligns with the City of Charlotte’s Safe Communities, while also strengthening and Workforce & Business Development:

Safe Communities: Reducing early educational disparities that contribute to later inequities and youth vulnerabilities.

Workforce & Business Development: Creating career pathways by hiring former program participants and supporting parents to become home-based child care providers, expanding both economic opportunity and Charlotte’s child care capacity.

Longitudinal studies show ParentChild+ participants enter school 10 months ahead, are 50% less likely to need special education, and graduate at rates 30% higher than socio-economic peers.

While ParentChild+ does not conduct full SROI analyses, we apply cost-effectiveness principles and draw on external research, including the Hevesi ROI Study (up to \$210,000 in long-term educational savings per child) and economist James Heckman’s findings showing 13% annual return on investment for high-quality early childhood programs.

Recognized by the North Carolina Partnership for Children/Smart Start as an evidence-based model, ParentChild+ is well positioned to continue leveraging public and private funding to expand services across the region.

As Charlotte continues to face low early literacy rates and persistent opportunity gaps, ParentChild+ addresses these challenges at their earliest root by empowering parents and early childhood caregivers, often overlooked by traditional systems, in their vital role as a child’s first and most important teachers. With continued support from the City and our partners, the program will expand access to high-quality early learning opportunities in historically under-resourced neighborhoods, ensuring every Charlotte child enters kindergarten ready to thrive. These efforts are especially critical given that 18.3% of children in Mecklenburg County live in food-insecure households and only 46.3% of third graders are reading at grade level, a rate 1.5 percentage points below the state average.

Current Financial Partner?

No

Agency Established

1965

FY 2027 Funding Request

\$190,000

FY27 Projected Overall Agency Budget	FY2027 Request	
\$7,012,613	\$190,000	3%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 95 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	14	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	18	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	14	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	15	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5	3–4	1–2	0

			<i>Diversified; strong sustainability</i>	<i>Partial diversification</i>	<i>Minimal planning</i>	<i>None described</i>
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Population Served

ParentChild+ Charlotte works with families primarily from historically under-resourced communities, with 93% identifying as African American and 7% as Hispanic. The vast majority of households (96%) are led by single mothers, and nearly all families report living below the federal poverty level. 71% of the providers with whom we work are African American, and 29% are Hispanic. These demographics reflect the program’s focus on supporting families who face significant economic and social barriers, ensuring children have access to high-quality early learning opportunities from the very start.

Describe the activities that will be supported through requested city funding

If awarded, the requested funding will primarily support the ParentChild+ National Center’s Charlotte-specific work, with a portion potentially passed through to local Charlotte sites to support their direct program operations if needed.

Funding passed through to Charlotte sites will cover:

- Site-level staff salaries and benefits, including Site Coordinators and Early Learning Specialists (home visitors).
- Program materials - culturally relevant books, educational toys, and art supplies.
- Operational expenses - travel, communication, printing, office supplies, and indirect costs.

City funding will also support Charlotte-specific National Center infrastructure, including:

- Personnel time dedicated to Charlotte (state director and National Center staff involved in development, communications, program support, research, etc.)
- Curriculum development and staff training for Charlotte sites
- Quality assurance, evaluation, and technical assistance systems support for Charlotte sites
- Fidelity monitoring to ensure consistent, high-quality implementation for Charlotte sites

Charlotte-specific indirect costs

These infrastructure investments ensure that both local Charlotte partners and all ParentChild+ sites can deliver the program with fidelity, achieve strong outcomes, and maintain high-quality service delivery.

ParentChild+ delivers two evidence-based/supported home visiting models:

Family Home Visiting (FHV): supports individual families with personalized, twice-weekly 30-minute home visits (total 92) to strengthen parent-child interaction, early literacy, social-emotional skills, and school readiness. The first visit of the week introduces the week’s curricular material, either a book or an educational toy (such as a puzzle, threading beads, blocks, or magnetic letters). The second/review visit builds on the family’s familiarity with the material and introduces extension activities, using art, music and movement, or materials previously brought in. The curricular materials are extended by Guide Sheets outlining additional literacy and play activities for the family to enjoy together.

Home-Based Child Care (HBCC): works with home-based providers (including Family Friend & Neighbor, Family Child Care etc.) through intensive twice-weekly visits (48 total) while children are present. These visits promote high-quality adult-child interaction, school readiness, and family engagement. As in the Family Home Visiting model, each provider receives a culturally relevant book or educational toy during the first weekly visit, with the second visit building on that learning. Additionally, every child in care receives their own copy of the books to take home.

ParentChild+ helps level the playing field before children enter their first classroom, ensuring all children have access to equal opportunities from the start. This grant will strengthen ParentChild+ Charlotte’s network by enhancing staff support, training, curriculum, data systems, and technical assistance, ensuring all local sites deliver consistent, high-quality programming that produces meaningful outcomes for families and children.

Strategies agency plans to implement to sustain the agency or program(s) in future years

Objective	Measure	FY2027 Target
Family Model: Support children’s developmental progress so they exit on track for school readiness, strengthening families and contributing to thriving neighborhoods.	Children exit the program with their developmental progress on track.	At least 75%
Family Model: Build parents’ and caregivers’ capacity to support children’s social-emotional growth, helping children exit ready for school and contributing to stronger, thriving neighborhoods.	Children exit the program with their social-emotional development on track.	at least 85%
Family Model: Strengthen parents’ and caregivers’ supportive parenting skills, helping children enter school ready and fostering stronger, thriving neighborhoods.	Parents/caregivers exit the program meeting our target for supportive parenting behaviors associated with school readiness (PICCOLO).	at least 80%
HBCC Model: Strengthen providers’ practices and learning environments, ensuring quality care that supports children’s development, allows parents to work, and benefits all future children in care setting.	Child care providers exit the program meeting our target for quality home-based child care environments.	at least 80%

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$95,874	\$97,698	\$282,804	\$296,944	\$90,500	30%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$19,768	\$21,493	\$65,017	\$68,268	\$20,500	30%
Subtotal Personnel Expenses	\$115,642	\$119,191	\$347,821	\$365,212	\$111,000	30%
Operating						
Capital Equipment	\$0	\$0	\$15,605	\$16,385	\$4,900	30%
Operating Fees	\$343	\$408	\$1,243	\$1,305	\$390	30%
Other Expenses	\$0	\$0	\$2,916	\$3,062	\$905	30%
Outreach	\$0	\$0	\$2,195	\$2,305	\$700	30%
Program Expenses	\$63,166	\$135,362	\$254,734	\$267,471	\$79,000	30%
Subtotal Operating Expenses	\$63,509	\$135,770	\$276,693	\$290,528	\$85,895	30%
Total Expenditures	\$179,151	\$254,961	\$624,514	\$655,740	\$196,895	30%
Net Revenues	-\$34,151	\$63,039	-\$172,175	-\$203,401		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner or otherwise)	\$0	\$0	\$0	\$0
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding	\$145,000	\$212,500	\$318,000	\$452,339
Donor Contributions	\$0	\$0	\$0	\$0
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0
Total Revenues	\$145,000	\$212,500	\$318,000	\$452,339

Current Board of Directors

Barry Berman
Christine Choi
Blake Hallinan

Stanley Butterfass
Brenda DiLeo
Sonia Hamstra

Charles Butts
Julian Gomez
Edward Kimotho

Howard Landsberg
James Molloy
Danielle Sirianni
Kristian Whalen

Alex Lentz
Thomas Powers
Jane Spencer
Tanya Zaben

Marlene Motyka
Joshua Schwartz
Tai Chang Terry

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FY 2027 Financial Partner Agency Summary

Safe Alliance

Agency Description

Domestic violence, sexual assault, and human trafficking remain pervasive issues across the United States. According to the National Coalition Against Domestic Violence, more than 1 in 3 women and 1 in 4 men in the U.S. have experienced rape, physical violence, or stalking by an intimate partner during their lives. In Mecklenburg County, home to nearly 1.2 million people, this translates to more than 300,000 individuals who have endured such trauma. Domestic violence service calls are among the most dangerous for law enforcement, with the Charlotte Mecklenburg Police Department (CMPD) receiving nearly 26,000 calls for service in the first 8 months of the year, which is up 3% compared to 2024. On average, CMPD receives 40,000 domestic violence calls annually. Additionally, North Carolina ranks 9th in the nation for human trafficking with Charlotte emerging as a central hub for these crimes.

On average, North Carolina sees a domestic violence homicide case every 5.5 days. In 2024, Mecklenburg County experienced a 125% increase in domestic violence related homicides compared to the previous year, totaling nine lives lost. Research from the Jamie Kimble Foundation for Courage estimates that the policing cost of domestic violence in Mecklenburg County exceeded \$2 million in 2018, which is now over \$2.5 million when adjusted for inflation.

Safe Alliance is a nonprofit agency with over 100 years of service to individuals and families in Mecklenburg County. As the region's recognized provider of critical, lifesaving, wrap-around services for victims of domestic violence, sexual assault, and human trafficking, we are committed to building safer communities through prevention, intervention, and advocacy. Our goal is to help survivors feel physically, emotionally, mentally, and financially safe. We achieve this through a trauma-informed continuum of care that includes:

- The Greater Charlotte Hope Line, a free, confidential, 24/7 hotline offering intervention and prevention services for domestic violence, sexual assault, human trafficking, and parenting support.
- The Clyde & Ethel Dickson Domestic Violence Shelter is a safe haven for adult victims of domestic violence who are in imminent danger and their dependent children. While guests stay with us, we provide for their basic needs such as food and toiletries, as well as safety planning, counseling, substance abuse counseling, support groups, individual advocacy, respite childcare, life skills, and career planning services.
- The Sexual Trauma Resource Center (STRC) provides hospital accompaniment, safety planning, advocacy, support groups, and individual counseling for victims of sexual assault.
- The Victim Assistance Court Program (VACP) offers crisis intervention, safety planning, court advocacy, court accompaniment, and free legal representation for victims seeking or renewing a Domestic Violence Protective Order.
- The Lake Norman office serves victims of domestic violence, sexual assault, and human trafficking that reside in Cornelius, Davidson, or Huntersville. This location provides similar services to those offered at VACP and STRC including assisting with drafting a protective

order, legal representation, hospital accompaniment, support groups, and individual counseling for victims of sexual assault.

- The Survivor Resource Center is a collaborative hub designed to streamline access to services for survivors facing the highest lethality risks from domestic violence, sexual assault, and child maltreatment. Key partners include Mecklenburg County, Pat’s Place Child Advocacy Center, the Charlotte-Mecklenburg Police Department, and Safe Alliance. The SRC serves as a precursor for The Umbrella Center (TUC), an 88,000 square foot facility that will unite more than 250 service providers under one roof. Once operational, TUC is projected to serve more than 10,000 victims and their children annually, offering holistic, trauma-informed care in a centralized and accessible location. As the administrative lead, Safe Alliance will provide intake, advocacy, navigation services, and the coordination of multidisciplinary teams to ensure survivors of domestic violence, sexual assault, child abuse, elder abuse, and human trafficking receive comprehensive support and can pursue justice for themselves and their families.

Current Financial Partner?

Yes

Agency Established

1909

FY 2027 Funding Request

\$438,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$9,426,776	\$438,000	5%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

+10 years

Funding History

FY2024	FY2025	FY2026
\$397,038	\$397,038	\$397,038

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 85 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	14	18-20 <i>Direct, compelling alignment</i>	14-17 <i>Clear alignment</i>	9-13 <i>General/indirect alignment</i>	0-8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	12	13-15 <i>Well-defined; outcome-connected</i>	10-12 <i>Clear; minor gaps</i>	6-9 <i>Underdeveloped</i>	0-5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	14	18-20 <i>Measurable outcomes; realistic targets</i>	14-17 <i>Adequate; mostly outcome-focused</i>	9-13 <i>Output-focused; limited detail</i>	0-8 <i>Unclear/missing</i>
Financial Health & Budget	15	15	13-15 <i>Complete; strong controls</i>	10-12 <i>Generally sound</i>	6-9 <i>Budget unclear</i>	0-5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	15	13-15 <i>Strong leadership & policies</i>	10-12 <i>Adequate; minor gaps</i>	6-9 <i>Capacity concerns</i>	0-5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9-10 <i>Clear need; underserved focus</i>	6-8 <i>Need defined; limited data</i>	3-5 <i>Broad; limited justification</i>	0-2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3-4 <i>Partial diversification</i>	1-2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Safe Alliance provides comprehensive support to individuals impacted by domestic violence, sexual assault, and human trafficking in Mecklenburg County. In FY25, we served nearly 8,000

individuals and impacted more than 25,000 through direct services, outreach, and community awareness events.

While domestic violence affects individuals across all socioeconomic backgrounds, our services are primarily accessed by residents in under-resourced neighborhoods. We focus on supporting individuals experiencing financial hardship and those facing barriers to accessing safety and long-term stability.

Domestic violence remains a leading cause of homelessness for women. National data shows that 57% of homeless women cite domestic violence as the immediate cause of their homelessness, and 80% of mothers and children experiencing homelessness have a history of domestic violence. A lack of safe housing options and additional barriers to seeking community services often leads women to stay in or return to violent relationships.

In the last fiscal year, 77% of our clients identified as members of a racial or ethnic minority group and 91% identified as female. Additionally, 85% of Shelter residents reported living below the federal poverty line. These overlapping factors often contribute to limited access to available community resources, critical legal protections, and affordable safe housing, making it more difficult for victims to escape dangerous situations and rebuild violence-free lives.

Describe the activities that will be supported through requested city funding

Domestic violence is a pervasive public safety issue that affects individuals, families, and entire communities. It encompasses physical, emotional, sexual, or economic abuse, isolation, coercion, or abuse of privilege. Victims are at an increased risk of physical and mental health problems, job loss, housing instability, and continued harm through post-separation abuse. Children who witness domestic violence are significantly more likely to become victims or perpetrators themselves, perpetuating a cycle of violence across generations.

The most dangerous time for a victim is often when they leave their abuser. This loss of control for the perpetrator frequently triggers escalated violence. According to Battered Women's Support Services, there is a 75% increase in violence upon separation, lasting for at least two years. The majority of domestic violence homicides and serious injuries occur during this period. A study from the Training Institute on Strangulation Prevention found that a woman who has suffered a nonfatal strangulation by an intimate partner is 750% more likely to be killed by that same perpetrator.

What begins behind closed doors doesn't stay there. Domestic violence ripples outward, impacting friends, neighbors, and the broader community. A 2021 study found that nearly 60% of mass shootings from 2014-2019 were domestic-violence related, and in over two-thirds of those cases, the perpetrator had a history of domestic violence or killed a partner or family member. Another report from 2025 revealed a disturbing link between men who strangle women and those who kill law enforcement officers. 80% of suspects had a prior domestic violence history, and 30% had previously committed non-fatal strangulation. In fact, more officers are shot responding to domestic violence calls than any other type of firearm-related fatality. These statistics highlight the need for intervention and prevention strategies that prioritize survivor safety and community protection.

Safe Alliance is the region's leading recognized provider of free, trauma-informed services for victims of domestic violence, sexual assault, and human trafficking. Our low-barrier model ensures

that all victims can access the help they need. With continued support from the City of Charlotte, we are committed to empowering survivors, increasing community safety, and strengthening partnerships through three core services, the Greater Charlotte Hope Line (Hotline), the Victim Assistance Court Program (VACP) and Legal Representation Program (LRP).

The Hotline is a 24/7 confidential resource offering crisis intervention and prevention services for domestic violence, sexual assault, and human trafficking, and parenting support. It is often the first point of contact for survivors seeking help. In FY25, Hotline Advocates answered 8,994 calls, a 13% increase from the previous year, and completed nearly 7,000 safety plans. Four months into FY26, we are already seeing a continued rise in calls, projecting a 24% increase from FY24. The Hotline also manages an online chat feature, expanding access for those in crisis.

One of the primary goals of the Hotline is to interrupt the cycle of violence. By integrating parenting support and using the Strengthening Families Framework, Hotline Advocates help families build resilience, social connections, and knowledge of child development, reducing the likelihood of future abuse and neglect.

The Hotline has also become an essential partner for law enforcement, particularly as domestic violence related calls continue to rise. Police officers regularly utilize the Hotline during and after high-risk responses to coordinate immediate safety planning for victims, obtain rapid referrals for shelter, counseling, and advocacy services, and ensure families have support long after officers leave the scene.

Just as importantly, the Hotline provides a confidential space for officers themselves, who are not immune to the personal impact of domestic violence. Whether seeking guidance for a family member, navigating their own safety concerns, or needing emotional support after responding to traumatic calls, officers can turn to the Hotline without stigma or fear. This access strengthens both officer well-being and community safety, helping ensure that those on the front lines have the support they need to continue serving effectively.

In 2024, Safe Alliance led the implementation of the updated Lethality Assessment Protocol (LAP) 2.0 in partnership with the Charlotte Mecklenburg Police Department and six town police departments. This screening tool helps law enforcement identify domestic violence victims at the highest risk of being killed and immediately connects them with a Hotline Advocate. In FY25, we received 443 LAP calls, and we expect similar numbers in FY26.

The VACP and LRP program provide free legal services, court accompaniment, and advocacy for survivors seeking a protective order and navigating complex legal systems. Access to civil legal representation is critical, as protective orders are granted in 83% of cases when a victim has an attorney, compared to just 32% without one. In FY25, VACP and LRP staff served 2,890 individuals, reflecting an 11% increase from FY24 and a 65% increase from FY23. Our attorneys reviewed and/or drafted 591 sets of pleadings and provided legal representation and/or extensive legal advice 583 times. Advocates and attorneys work together to ensure clients receive comprehensive, holistic support.

VACP and LRP staff often work with clients facing the highest lethality in domestic violence situations. Many clients endure extreme violence, including strangulation, being shot at, stabbing,

severe beatings, and sexual assault. As previously mentioned, research shows that a woman who survives a nonfatal strangulation by an intimate partner is 750% more likely to be killed by that same perpetrator. To prevent the next domestic violence homicide, staff refer victims to the High-Risk Team for comprehensive case review. The multidisciplinary team collaborates to identify strategies that enhance victim safety and ensure offender accountability. Partners include CMPD, the District Attorney's Office, Safe Alliance, Atrium Health's Domestic Violence Healthcare Program, Community Support Services, Child, Family, and Adult Services, the Department of Social Services, Pats Place Child Advocacy Center, and other agencies as needed to provide a holistic review. Recognizing the critical nature of these cases, Safe Alliance prioritizes ongoing training on strangulation. Last year, Safe Alliance staff, a District Court Judge, an Assistant District Attorney, and a CMPD Officer attended specialized strangulation training as a team to increase collaboration to serve survivors of strangulation. VACP and LRP continue to ensure all staff receive training on strangulation and its life-long impact on victims.

Court accompaniment plays a vital role in keeping survivors engaged in the justice system, which is critical for both their personal safety and community protection. Navigating the legal process can be overwhelming and intimidating, especially for victims who are already experiencing trauma. A 2024 report found that victims with advocacy support are 49% less likely to withdraw from the criminal justice process compared to those without support. This aid is invaluable in encouraging them to stay engaged in the system and to help empower victims to heal and move forward.

VACP Advocates provide court accompaniment to civil protective order court, misdemeanor, and felony court, ensuring survivors are not alone during one of the most challenging times in their lives. In FY25, VACP saw a more than 10% increase in court accompaniment services, reflecting the growing demand for this type of assistance. By providing support for survivors through the civil and criminal court process, we aim to increase survivor safety and empower victims to testify against their abusers, ultimately increasing offender accountability and making our community safer.

A common misconception is that abuse ends when a victim leaves an abusive situation. In reality, many victims continue to face harm through post-separation abuse, placing a prolonged financial and emotional burden on survivors. Legal abuse is a tactic used by abusers to harass and exhaust victims through frivolous lawsuits, strategic delays, and excessive discovery requests. Alarming, 90% of victims report experiencing post-separation abuse for years or even decades.

The financial toll of domestic violence is staggering. Survivors may lose thousands, sometimes totaling over \$100,000, including lost wages, reduced productivity, and long-term mental health costs. In North Carolina, the average hourly rate for a family law attorney is \$310, and many family law cases can last years. For survivors, these prolonged legal battles are not only emotionally taxing but financially prohibitive. In 2018, the total cost of domestic violence in North Carolina was estimated at over \$500 million, with Mecklenburg County accounting for nearly \$49 million. Adjusted for inflation, that figure now exceeds \$64 million, with over \$6 million in court-related expenses alone. These ongoing legal battles drain not only the survivors involved, but also the systems intended to protect them, diverting community resources away from prevention, intervention, and long-term safety efforts, weakening the community's ability to keep families safe.

To address these challenges, Safe Alliance has built partnerships and developed a robust pro bono network. In FY25, volunteer attorneys provided 1,901 hours of free legal support, a drastic increase

from 131 hours in FY22. In response to post-separation abuse, LRP attorneys continue to assist clients beyond the protective order hearings, offering support with family court matters. In FY25 alone, LRP provided family law services nearly 300 times. On a weekly basis, at minimum, VACP works with a client who has children. When a custody issue arises, advocates document this in the legal referral to LRP. LRP attorneys offer advice, prepare custody pleadings, and in rare cases, provide representation in custody court. Oftentimes, abusers file pleadings that are frivolous and create undue hardship for victims rebuilding their lives. Throughout these proceedings, advocates provide critical emotional support, ensuring clients remain engaged and empowered in the legal process.

Looking ahead, LRP will continue to grow its pro bono network, engaging new attorneys who hope to expand their involvement with pro bono work and philanthropic service. Rather than pay exorbitant attorney fees and spend excessive time in court responding to superfluous legal matters raised by their abusers, victims can utilize LRP staff attorneys and pro bono volunteer attorneys and legal professionals for limited representation and advice. LRP attorneys are committed to continuing their support with family law pleadings and will provide this crucial service. By expanding this support, we can better protect survivors from ongoing legal abuse and its financial and emotional toll, while ensuring that community resources are directed toward more meaningful safety initiatives rather than frivolous litigation, ultimately creating a safer, more resilient community.

For years, VACP has partnered with the City of Charlotte, local law enforcement, and numerous community organizations to support victims of violence. Historically, VACP referred clients to Legal Aid of North Carolina (LA) and Charlotte Center for Legal Advocacy (CCLA) for legal advice or representation in obtaining protective orders. However, recent economic challenges have changed this landscape. CCLA no longer accepts referrals for domestic violence protective orders, and LA now limits intake to cases where an emergency order has already been granted. As a result, more complex cases are falling to LRP attorneys, significantly increasing our caseload and demand for services. Unfortunately, victims whose emergency orders are denied often face additional barriers, such as language access, that hinder their ability to convey the severity of their situation to the courts. While these partnerships may look different moving forward, VACP and LRP remain steadfast in our commitment to ensuring every client receives the support they need to feel safe and secure.

Looking ahead, the opening of The Umbrella Center in 2026 will significantly increase demand for services. With continued City funding, we will provide life-saving support to survivors in imminent danger, strengthen community partnerships, and promote safety and healing across Mecklenburg County. By empowering victims to testify against their abusers, we aim to increase offender accountability, reduce the number of abusers on our streets, and create a safer community for everyone, including law enforcement.

Strategies agency plans to implement to sustain the agency or program(s) in future years

We are grateful to have a network of steadfast donors who provide financial support to Safe Alliance and additional services annually. Safe Alliance's Board of Directors and staff leadership work diligently to identify and secure continued and diversified funding streams to ensure our future financial stability. We receive funding from a variety of sources, including government grants,

foundations, and individuals. Our top advancement goal is to increase individual unrestricted gifts to the agency. Our Advancement Plan focuses on growing our annual giving programs by increasing multi-channel campaigns, including digital, print, and in-person requests. We have streamlined our signature events to maximize revenue and are focusing on growing our donor groups. Just this fiscal year, we surpassed our \$300,000 Breakfast of Hope fundraising goal, securing over \$420,000 in support. Gifts from our top philanthropic donors allow Safe Alliance to operate in a sustainable manner while continuing to provide our vital services. The agency and board are committed to non-event and major gift fundraising, successfully growing our donor revenue by 54% since fiscal year 2018. The Board Finance and Executive committees evaluate our success regularly, comparing results to previous years and budgeted goals, and present analyses and recommendations to the Board.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Improve the overall safety of victims.	Develop personalized safety plans with victims of domestic violence, sexual assault, and human trafficking.	6,542 safety plans completed	VACP and GCHL staff will complete 12,500 safety plans with survivors.
Improve the overall safety of victims and increase offender accountability.	Accompany victims to civil, misdemeanor, and felony court as they seek a domestic violence protective order and/or testify against the abuser in the criminal case.	New Measure	VACP will provide court accompaniment or court outreach to victims 3,000 times.
Improve the overall safety of victims through community relations.	Staff will provide indirect advocacy through community collaboration to ensure victims receive holistic care.	New Measure	VACP and LRP will provide indirect advocacy 1,500 times.
Improve the overall safety of victims through community relations.	Through strong community partnerships, provide individualized referrals that connect victims to services supporting their physical, emotional, mental, and financial safety.	New Measure	VACP and LRP staff will provide 4,500 referrals to victims.
Improve the overall safety of victims.	Provide free legal services to victims regarding their civil domestic violence case, custody case, or other post-separation abuse case.	256 clients assisted	LRP staff will provide legal advice to 600 clients.

Program Budget

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2026 CITY REQUEST	
Personnel						
Salaries	\$615,284	\$730,931	\$805,443	\$821,881	\$306,424	37%
Merit	\$18,459	\$22,699	\$16,438	\$24,656	\$9,477	38%
Benefits	\$243,327	\$274,767	\$271,516	\$285,092	\$110,899	39%
Subtotal Personnel Expenses	\$877,070	\$1,028,397	\$1,093,397	\$1,131,629	\$426,800	38%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$0	\$0	\$0	\$0	\$0	\$0
Facilities (e.g. rent, utilities)	\$2,004	\$273	\$1,300	\$1,352	\$0	0%
Office Supplies	\$8,043	\$12,261	\$11,700	\$12,168	\$1,000	8%
Travel & Training	\$3,304	\$16,908	\$15,000	\$15,600	\$2,000	13%
Technology	\$47,004	\$43,182	\$53,878	\$56,033	\$2,000	4%
Direct Assistance to Clients	\$14,732	\$10,004	\$13,200	\$13,728	\$0	0%
Dues, Licenses, & Subscriptions	\$3,315	\$4,286	\$5,650	\$5,876	\$2,500	43%
Insurance	\$17,042	\$20,501	\$14,016	\$14,577	\$0	0%
Printing & Postage	\$16,822	\$9,377	\$12,257	\$12,747	\$2,500	20%
Professional Services	\$1,762	\$2,951	\$7,167	\$7,454	\$1,200	16%
Program Support	\$10,798	\$5,437	\$8,974	\$9,333	\$0	0%
Subtotal Operating Expenses	\$124,825	\$125,180	\$143,142	\$148,868	\$11,200	8%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2026 CITY REQUEST	
Total Expenditures	\$1,001,895	\$1,153,577	\$1,236,539	\$1,280,497	\$438,000	34%
Net Revenues	-\$426,705	-\$300,486	-\$512,106	-\$546,497		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$558,402	\$701,334	\$555,933	\$550,000
City Funding (financial partner or otherwise)	\$0	\$0	\$0	\$0
Mecklenburg County Funding	\$16,788	\$39,001	\$81,000	\$84,000
Foundation Grants & Funding	\$0	\$112,756	\$87,500	\$100,000
Donor Contributions	\$0	\$0	\$0	\$0
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0
Total Revenues	\$575,190	\$853,091	\$724,433	\$734,000

Current Board of Directors

- | | | |
|------------------|----------------------|------------------------|
| Leslie Wickham | Jamilah Espinosa | Faith Fickling-Alvarez |
| Marcie Shealy | Mark Wilson | Suzy Jackson Akers |
| Scott Harris | Charlis Brock | Terry Brown, Jr |
| Dan Capek | Charles Carpenter | Noelle Clarke |
| Leta Emmanuel | Sarah Firquin | Suzanna Fox |
| Amanda Franklin | Julia Hejazi | Libby Kelligrew |
| Dena King | Spencer Merriweather | Renee Miller |
| Conroy Parchment | Mile Pranjic | Craig Varnum |

FY 2027 Financial Partner Agency Summary

The Co-Parenting Hub

Agency Description

The Co-Parenting Hub is a first-of-its-kind, community-based family support organization designed to replace unsafe parking-lot child exchanges with a dignified, supportive, and child-centered environment, while also connecting families to the resources they need to stabilize and thrive.

Across the nation, thousands of separated parents are forced to exchange children in parking lots, gas stations, or curbside locations due to conflict, court orders, or safety concerns. These moments are often charged with stress, fear, and tension – can leave lasting emotional impacts on children and families. The Co-Parenting Hub was created to transform these moments into safe, structured transitions paired with meaningful family support.

As the nation’s first dedicated co-parenting exchange hub, the organization provides a neutral, supervised, and welcoming space where children can transition between households safely, while parents and caregivers are connected to practical resources, education, and support services that reduce conflict and strengthen family stability.

Current Financial Partner?

No

Agency Established

2025

FY 2027 Funding Request

\$150,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
Not provided	\$150,000	100%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Financial Statement	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
X	X	✓	✓	✓	X*	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - X

*Organization founded in October 2025; therefore, no tax return filings required at time of application

Application Scoring

Total Score: 78 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	17	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	10	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	19	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	10	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	10	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	9	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	3	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

The Co-Parenting Hub serves children and families who are separated, co-parenting, or in foster care, providing a safe place for child exchanges and access to support services.

We serve:

- Children (birth - 17), including those in foster care
- Parents and caregivers who share parenting responsibilities or need support in high-conflict situations
- Foster parents and kinship caregivers responsible for children's transitions
- Families referred by courts, social services, or community partners

The Hub focuses on families who currently exchange children in parking lots, public spaces, or other unsafe settings and need a safe, supportive alternative.

Describe the activities that will be supported through requested city funding

City funding will directly support programs and services that enhance child safety, strengthen co-parenting relationships, and provide underprivileged families with critical resources and opportunities. Key activities include:

Safe Child Exchange Services

- Supervised transitions between households in a neutral, child-centered environment
- Structured schedules to reduce conflict and ensure children's emotional safety
- Support for foster parents, kinship caregivers, and separated parents

Family Support Programs

- The Second Home Project - Provides furniture and household items to create stable, nurturing second homes for children
- Family Counseling Services - Offers mental health support, conflict resolution, and parenting guidance for families navigating separation or custody challenges

Youth Enrichment & Support

- "Wish With Me" Program - Provides underprivileged children with gifts, school supplies, and basic needs to support emotional and physical well-being
- Child-centered spaces and activities to foster a safe, nurturing environment during transitions

Parent Engagement & Reconnection

Reconnecting Dads Program - Helps noncustodial fathers re-establish relationships with their children through mediation, parenting support, and guided visitation plans

Community Education & Outreach

- Workshops and classes that teach co-parenting skills, communication, and conflict resolution

- Partnerships with courts, schools, and social services to strengthen family support networks

Impact of City Funding

Funding will ensure that children experience safer exchanges, families have access to essential support services, and underprivileged children receive gifts and resources that foster stability and well-being. It will also help fathers, caregivers, and parents reconnect and engage meaningfully with their children, promoting stronger, healthier families throughout the community.

Strategies agency plans to implement to sustain the agency or program(s) in future years

While city funding provides critical support for one fiscal year, The Co-Parenting Hub has a comprehensive strategy to sustain its programs and operations in future years through diversified funding sources and community partnerships.

1. Diversified Revenue Streams

- **Foundation Grants:** Actively pursue local, regional, and national grants from family services, child welfare, and community development foundations.
- **Corporate Sponsorships:** Partner with businesses to sponsor programs, events, and family support initiatives.
- **Individual Donors & Fundraising:** Maintain a recurring donor program, host annual fundraising events, and leverage community giving campaigns to supplement revenue.
- **Program Fees & Sliding-Scale Contributions:** Implement affordable participation fees for certain programs, while ensuring accessibility for low-income families.

2. Strategic Partnerships

- Collaborate with schools, courts, social services, and local nonprofits to share resources and extend program reach.
- Leverage in-kind donations, volunteer support, and shared facilities to reduce operating costs and maintain program quality.

3. Demonstrating Impact

- Collect and report measurable outcomes for programs such as Second Home Project, Family Counseling, Wish With Me, and Reconnecting Dads.
- Use data to demonstrate program effectiveness, attract funders, and make the case for multi-year grants and sustainable support.

4. Building Organizational Capacity

- Develop a reserve fund to ensure program continuity during funding gaps.
- Invest in staff development and infrastructure to maintain operational excellence and scalability.

Through these strategies, The Co-Parenting Hub is committed to ensuring that city-funded programs are sustainable, impactful, and continuously available to the children, parents, and families who rely on them, long after a single fiscal year.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Ensure children experience safe, structured transitions between households	Number of co-parenting plans developed or facilitated for separated/divorced families	5 co-parenting plans
Support families in need through material resources	Number of families receiving donated furniture, mattresses, or household items via The Second Home Project	3–5 families
Improve children’s safety, stability, and wellbeing	Number of children benefiting from donations, furniture, or support services	6 children
Increase parent engagement in co-parenting support	Number of parents actively participating in mediation, education, or family support programs	5 parents
Build awareness of available services	Number of families contacted or referred to The Co-Parenting Hub	10 families

Overall Program Budget

Not provided

Current Board of Directors

Nia Brown
Marilyn Smith
Brandy Fullins
Pam Johnson

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FY 2027 Financial Partner Agency Summary

The Knothole Foundation

Agency Description

The Knothole Foundation, Inc. (“Knothole”) is a 501(c) (3) corporation organized in 2018 for public and charitable purposes, including athletic and educational purposes.

Knothole’s mission is to enhance youth’s lives by increasing access, skills and opportunities through participation in ball and bat sports. Knothole personnel dedicate time and energy to teach, encourage and assist the West Charlotte community, the underserved youth in the area, and the schools, community organizations and neighborhood support groups serving the same.

Knothole has raised +/- 9.5M of capital funds and developed the Richard “Stick” Williams Dream Fields & Education Center (the “Project”), a state-of-the-art academic and athletic complex located in the heart of the Tuckaseegee corridor. Knothole offers an unprecedented menu of program services to the underserved youth in the area, including education, life skills/mentoring, health/wellness protocols, community outreach and skills instruction.

Knothole strategically aligns w/the brightest and most diverse group of partners in the community to provide the most comprehensive and responsive academic/career support, and a meaningful path to upward economic mobility to serve social justice and “level the playing field”. The financial, social, & justice impact of the Project is summarized as follows:

- \$9,500,000 in invested capital into a long-term community jewel and centerpiece
- Revitalized neighborhood within the Tuckaseegee corridor in West Charlotte & a hub for community, youth development, education, & softball/baseball
- A highly utilized & visible facility (estimated annual views of 131,000 spectators, 1.5M vehicles via Tuckaseegee Road, 2M air passengers, & 44M vehicles on I-85, w/nearly 16M in direct economic impact)
- Hundreds of female youth participating on teams & in related education programming (thousands touched thru clinics & related place-based programming)
- Playing field leveled (particularly for African American female youth) & benefitting from equal participation in team sports

While Knothole has generally met or exceeded Project goals, a key participation metric-gender equity-lags. In response, Knothole is executing a specific initiative designed to significantly increase the entry and retention of girls in youth sports and related life-skill programming across the crescent, using softball as the conduit, with the overarching purpose of increasing the economic mobility and holistic well-being of marginalized girls in the West Charlotte corridor.

Current Financial Partner?

Yes

Agency Established

2018

FY 2027 Funding Request

\$75,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$800,069	\$75,000	9%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

1 year

Funding History

FY2026
\$75,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✗	✗	✗

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 88 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18-20 <i>Direct, compelling alignment</i>	14-17 <i>Clear alignment</i>	9-13 <i>General/indirect alignment</i>	0-8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	13	13-15 <i>Well-defined; outcome-connected</i>	10-12 <i>Clear; minor gaps</i>	6-9 <i>Underdeveloped</i>	0-5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	16	18-20 <i>Measurable outcomes; realistic targets</i>	14-17 <i>Adequate; mostly outcome-focused</i>	9-13 <i>Output-focused; limited detail</i>	0-8 <i>Unclear/missing</i>

Category	Max Points	Score	Excellent	Good	Fair	Poor
Financial Health & Budget	15	12	13-15 <i>Complete; strong controls</i>	10-12 <i>Generally sound</i>	6-9 <i>Budget unclear</i>	0-5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	13	13-15 <i>Strong leadership & policies</i>	10-12 <i>Adequate; minor gaps</i>	6-9 <i>Capacity concerns</i>	0-5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9-10 <i>Clear need; underserved focus</i>	6-8 <i>Need defined; limited data</i>	3-5 <i>Broad; limited justification</i>	0-2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3-4 <i>Partial diversification</i>	1-2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Knothole reaches nearly 2500 marginalized youth annually, with a particular emphasis on children and families experiencing economic hardship. By design, the Project is positioned in the heart of the challenged West Charlotte community, one of Charlotte's Corridors of Opportunity. Within 4 miles of the complex, there are 15 Title I schools (educating a significantly high percentage of students receiving free and reduced lunch), and over 12,000 youth, many of whom reside in households below the federal poverty level. Youth served by Knothole have a diverse profile, but a large majority (+95%) are African American or Latino and male. Within age ranges of 4-18 years old, the demographic is slanted heavily toward low/moderate income families. Notably, Knothole provides subsidies and/or scholarships to underwrite 90% of the cost of program delivery based on financial need.

The program earmarks girls in grades K-12 coming from socially and economically challenged West Charlotte neighborhoods whose communities have historically been underserved and underrepresented in softball.

The initiative directly benefits girls in multiple ways, including physical health (less risk of obesity, lower blood pressure, reduced cardiovascular disease), mental health (improved psychological well-being, reduced symptoms of depression), academic achievement (higher high school graduation rates, college attendance and retention) and leadership opportunities (greater involvement in extracurricular and learning activities). Moreover, in both single and dual-parent families, family satisfaction increases as children's participation in sport increases-especially for daughters. Family attitudes and accompanying support systems are elevated through girls' participation in sports.

The initiative acknowledges the intersection of race and gender and seeks to meet the unique needs of marginalized girls in the West Charlotte community. When girls are provided with education, support and equitable opportunities, entire communities are uplifted and transformed.

Describe the activities that will be supported through requested city funding

It's all about the girls! Girls who play sports do better in school, suffer fewer health problems, achieve more in areas dominated by men, and hold better jobs as adults. This trend is especially striking among girls from minority groups, who appear to experience greater social/economic mobility, and even more personal safety if they have participated in sports. Access to sports can empower girls and translate educational gains into higher education/employment success.

- Several key programs will be designed, implemented and supported to increase female participation at all ages. The program delivery model includes:
 - Creating developmental teams/leagues (within Park & Rec and/or Knothole) with emphasis on fun, interest, sense-of-belonging, skills instruction, and reading literacy
 - Designing specialized opportunities (showcase, tournament, championship) for existing middle/high school softball players that would also include year-around college/career prep and engagement
 - Implementing a sports management cohort with separate pathway/mobility measurables for middle/high school participants, including data management through an integrated tracking system capturing student profiles and establishing an analytical framework to support decisions/actions. This year-round, weekly cohort combines on-field softball instruction and gameplay with off-field youth development activities, workshops, and mentorship with college-level women athletes. The cohort is a “sports-plus” youth development initiative with the following goals:
 - Exposure: Increase girls' access to physical, mental and emotional benefits of softball.
 - Experiences: Provide meaningful and impactful life skills programming uniquely tailored for girls
 - Relationships: Establish structured college mentoring relationships between girls and college-level women athletes
 - Each goal is aligned with the following 3 priorities of Charlotte-Mecklenburg County and the country:
 - Economic Mobility (Chetty Study: Corridors of Opportunity, Leading on Opportunity)
 - Diversity, Equity, Inclusion, & Belonging (Mayor’s Racial Equity Initiative; Gender Equity, especially in sports)
 - Addressing public health factors associated w/ loneliness, isolation, & low physical activity (U.S. Surgeon General).

For the 2025-2026 Fiscal Year, the City of Charlotte and Knothole have partnered in support of Knothole’s girls in sports program push. The City’s support has been instrumental in the launch of the initiative, including funding staffing costs related to pilot implementation and provision of key program resources. For the 2026-2027 Fiscal Year, Knothole is seeking to continue that impactful partnership, as Knothole intends to scale and extend the scope of the gender equity program delivery model and to utilize incremental City funding to coordinate/accelerate delivery of effective programmatic outcomes. To that end, the requested funding will support a portion of the cost of program delivery, including personnel and staffing costs totaling \$60,000 (program director, part-time staff, coaches, interns, volunteers); program delivery and curriculum costs (training supplies,

material costs, critical resources) totaling \$10,000; and events and community engagement costs (marketing and outreach, meals and transportation, monthly clinics) totaling \$5,000. As highlighted in the program budget, a singular Program Director position would lead activities (supported by part-time staff, volunteers and interns) and critical resources would be dedicated to program delivery and curriculum as well as to planned events and community engagement. The City's funding commitment permits Knothole to make an investment in human capital to properly effect the initiative and to ensure consistent delivery of effective programmatic deliverables. Girls will receive impactful mobility-themed services on-site at the Project, at place-based clinics in partnership with community organizations, and via off-site programming.

The requested grant will permit Knothole to make a signature statement about "leveling the playing field" in West Charlotte and will facilitate sustainable improvement to the overall health/development of girls in underserved communities thru leadership training and capacity building. The requested funding will facilitate program goals in several respects:

- The grant will permit Knothole to provide a safe place for girls to play, funding programs to encourage them to play, and initiatives that will change attitudes toward their participation in sports/ life.
- Grant funding will support the cost to deliver life-skill programming across the board, setting the stage for execution of key financial literacy and STEM modules
- Grant funding will help Knothole eliminate barriers to participation by offering girls equal access to facilities, equipment and mentors, and will accelerate/amplify mission-specific programming, facilitate the revitalization of the Tuckaseegee corridor, and enhance college/career pathways thru collaborative community efforts.
- Grant funding will promote workforce development efforts by exposing rising youth to career advancement opportunities and creating mentorship programs that leverage assessment technology and provide additional oversight accountability

The gender equity program model ties together complimentary elements to create a pipeline of female youth participation and development which, in turn, promotes volunteerism at the highest level, draws strength from diversity, fosters economic mobility, and teaches financial well-being

Strategies agency plans to implement to sustain the agency or program(s) in future years

The estimated cost to execute and deliver the gender equity program model over the 2026-2027 Fiscal Year is \$250,000, as more fully set forth in the program budget. Committed financial partners for the initiative include:

- Barnes Family Foundation
- 5M Power
- Harvest Church
- D&A, LLP
- TD Bank
- Opus Foundation
- John F. Smiekel Foundation
- Kathryn McQuade Foundation
- Truist Foundation
- Stinger Sports

To ensure long-term support of the benefits of increased participation beyond the Fiscal Year 2026-2027 funding window, Knothole will establish a robust sustainability plan which will include revenue from key sources (i.e., donations/grants, field utilization fees, tournament income, and sponsorships, including sports marketing/media sponsorships) to offset ongoing operating costs. Knothole intends to leverage existing programming offered by its strategic partners to create marketing synergies to generate additional income; likewise, Knothole has created a marketing/media sponsorship program projected to generate significant revenue, and is exploring billboard advertising, as well as ancillary signage and sponsorship programs, all of which are designed to create multiple pockets of sustainability. Field and related revenue sources will be re-invested into programming activities to ensure affordable access.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Impact on significant number of youth	Number of youth served by this program per year based on registration and completion	15 youth	30
Mentoring for youth	Number of athlete mentors	20 mentors	25
Growth/retention	% girls attending the required GIS kick-off and completion activities	Year End Measure	75%
Mentoring for youth	%of girls receiving 20+ mentorship hours per year through structured activities	Year End Measure	75%
Parent/ Family Engagement	% of parents/guardians will report satisfaction with their child's program experience	Year End Measure	75%

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$0	\$10,304	\$57,750	\$116,250	\$60,000	52%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$0	\$0	\$0	\$0	\$0	0%
Subtotal Personnel Expenses	\$0	\$10,304	\$57,750	\$116,250	\$60,000	52%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$515,400	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)	\$0	\$0	\$0	\$0	\$0	0%
Facilities (e.g. rent, utilities)	\$0	\$5,000	\$0	\$0	\$0	0%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Office Supplies	\$0	\$0	\$0	\$0	\$0	0%
Travel & Training	\$0	\$0	\$0	\$0	\$0	0%
Technology	\$0	\$0	\$0	\$11,625	\$0	0%
Technology, Printing/Reproduction & Admin Support	\$0	\$0	\$31,500	\$0	\$0	0%
Program Evaluation	\$0	\$0	\$15,750	\$0	\$0	0%
Program Delivery and Curriculum	\$0	\$0	\$47,250	\$75,563	\$10,000	13%
Life Skills Workshops Materials	\$0	\$0	\$26,250	\$0	\$0	0%
Participant Swag	\$0	\$0	\$21,000	\$0	\$0	0%
Incentives	\$0	\$0	\$15,750	\$0	\$0	0%
Enrichment Activities	\$0	\$0	\$21,000	\$0	\$0	0%
Parent/Guardian Involvement & Workshops	\$0	\$0	\$21,000	\$0	\$0	0%
Events and Community Engagement	\$0	\$0	\$0	\$40,688	\$5,000	12%
Other:	\$0	\$0	\$0	\$5,874	\$0	0%
Subtotal Operating Expenses	\$0	\$520,400	\$199,500	\$133,750	\$15,000	11%
Total Expenditures	\$0	\$530,704	\$257,250	\$250,000	\$75,000	30%
Net Revenues	\$0	\$34,296	\$75,000	\$0		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner or otherwise)	\$0	\$0	\$75,000	\$0
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding	\$0	\$515,000	\$147,000	\$175,000
Donor Contributions	\$0	\$50,000	\$105,000	\$70,000
Service Fees	\$0	\$0	\$0	\$0

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Other Revenue	\$0	\$0	\$5,250	\$5,000
Total Revenues	\$0	\$565,000	\$332,250	\$250,000

Current Board of Directors

- | | |
|---------------|------------------|
| Patrick Baker | Harold Lloyd |
| Alan Barnes | Morris Madden |
| Jeff Bose | Broadus Roberson |
| Tashia Coe | Jeff Schaefer |
| Harold Grier | Stick Williams |
| TJ Lewis | |



Transportation and Planning

OUTCOME

Anticipating and planning for the change of the community. Addressing change with strategic investments, building and maintaining a comprehensive transportation network, and placemaking strategies that encourage connection between neighborhoods and employment centers.

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FY 2027 Financial Partner Agency Summary

Sustain Charlotte

Agency Description

Sustain Charlotte is a Charlotte-based nonprofit working to create a more equitable, connected, and healthy community by inspiring responsible growth and transportation choices. We advance the City’s Transportation & Planning priorities by helping residents and community partners adopt safer, more reliable mobility options, walking, biking, transit, and micromobility, through public education, neighborhood engagement, and cross-sector collaboration. Our work complements the City’s Strategic Mobility Plan by building community understanding, increasing utilization of transportation options, and elevating resident priorities that can inform implementation and investments

Sustain Charlotte also contributes directly to Charlotte’s traffic safety work through City partnership. Our staff member Meg Fencil serves as co-chair of the City of Charlotte Vision Zero Task Force alongside CDOT Deputy Director Charles Jones, who invited her to apply for this role, reflecting the strong working relationship and trust Sustain Charlotte has built with CDOT.

Through community engagement, Safe Streets education, and on-demand mobility coaching, our work supports these four of the City’s seven Transportation and Planning strategic progress measures: 1) reduce the number of bike/pedestrian fatalities and serious injuries, 2) increase transit ridership, 3) increase micromobility ridership, and 4) reduce the percentage of employed Charlotte residents who drive alone to work.

Current Financial Partner?

No

Agency Established

2010

FY 2027 Funding Request

\$100,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$631,472	\$100,000	16%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓
 Incomplete - ◇
 Not submitted - ✗

Application Scoring

Total Score: 90 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	17	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	14	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	18	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	13	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	14	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	4	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Charlotte residents, with intentional focus on neighborhoods where transportation barriers and traffic safety risks are greatest, including lower-income communities, communities of color, older

adults, youth, and families who rely on walking, biking, and transit for daily needs. We also serve community-based organizations, schools, neighborhood associations, and local institutions that help reach residents who are often underrepresented in transportation planning and safety conversations.

Describe the activities that will be supported through requested city funding

Sustain Charlotte will prioritize engagement in Charlotte’s crescent, with particular focus on the City’s Corridors of Opportunity and Strategic Investment Areas (SIAs). These geographies align with City-identified need and opportunity for impact (including safety priorities such as the High Injury Network and areas with historic underinvestment). Our approach is designed to complement CDOT’s strategic targeting, by pairing City investment priorities with deep, trusted community engagement that helps residents understand mobility options, build safety confidence, and elevate practical barriers and solutions.

This program is designed to support the City’s adopted Transportation & Planning progress measures by increasing safe, informed use of mobility options and elevating actionable safety barriers and solutions. Specifically, our Safe Streets education and experiential guided walks/rides will help reduce the risk factors that contribute to bike and pedestrian fatalities and serious injuries by building resident knowledge of safe behaviors and by documenting location-specific concerns for follow-up.

Our mobility coaching and trip-planning support, delivered at events and on-demand, will help more residents successfully use transit and micromobility for everyday trips, contributing to increased ridership. Finally, by making non-car travel more understandable, practical, and appealing for routine trips, the program supports a shift away from single-occupancy vehicle use, contributing to reduced rates of workers driving alone to work over time. These are leading-indicator strategies that complement City infrastructure investments by increasing adoption and utilization.

In each neighborhood where we engage, we will co-design and co-host activities with local neighborhood and/or community-based organizations so outreach occurs through trusted networks and residents are engaged in places where they already gather. Sustain Charlotte brings 15 years of direct work with residents and community organizations, especially in Charlotte’s crescent, building strong, durable relationships and a proven track record of effective, inclusive engagement.

Over the last 15 years, Sustain Charlotte has partnered with 150+ nonprofit and community organizations, including 25+ neighborhood associations, and 250+ businesses, focused specifically on planning and transportation issues. We are proposing to scale the same core work we have successfully delivered for years, now aligned to the City’s Transportation & Planning objectives and tracked through clear performance and access measures.

The program will be built around two proven engagement formats:

1. Experiential “Safe Streets” Guided Walks and Bike Rides

Sustain Charlotte will host guided, themed walks and rides that make safety education practical, engaging, and memorable. Events will be co-designed with local partners and may include themes such as history, green space, public art, local restaurants, or Black-owned businesses. Along the

route, participants will practice safe walking/biking/scooting behaviors, learn how street design features improve safety (or where gaps exist), and identify and record specific unsafe conditions and barriers to be compiled and shared after each event.

2. Partner-hosted safety and mobility presentations at neighborhood/community organization meetings

To reduce event-planning burden and meet residents where they already gather, Sustain Charlotte will deliver safety and mobility presentations at partner-hosted meetings, followed by time for Q&A and individualized support.

Mobility Coaching & Trip-Planning Support (multi-channel, on-demand):

Sustain Charlotte will provide residents with practical, personalized help planning trips by walking, biking, scooter, and transit through a combination of in-person “micro-clinics” and on-demand support. Coaching will be delivered in four ways:

1. Trip-Planning Clinics after guided walks/rides (10-15 minutes):

At the conclusion of each guided walk/ride, staff and/or trained volunteers will offer a brief trip-planning clinic to help participants map real-life trips (e.g., grocery, work, school), understand basic safety practices, and learn key “how-to” steps such as using trip-planning tools and navigating common barriers.

2. Mobility Help Desk at partner-hosted meetings:

At neighborhood association and community organization meetings, Sustain Charlotte will deliver a short safety/mobility presentation and then remain afterward for a “help desk” period where residents can request 1:1 trip-planning support.

3. Opt-in follow-up for residents who request assistance:

Residents can opt in to receive follow-up support after events (or anytime) via a simple form or reply-based request. Sustain Charlotte will respond with a tailored trip plan and resources based on the resident’s origin/destination, preferred mode, and comfort level.

4. On-demand coaching promoted through existing communications channels:

To expand access beyond in-person events, Sustain Charlotte will invite residents to request trip-planning help through our existing communications platforms (weekly email newsletter, social media, and opt-in text messaging). This allows residents, especially those new to non-car travel, to request individualized support without needing to attend an event.

A “coaching interaction” is counted when a resident submits a request and receives a tailored trip plan and/or direct assistance (in-person or follow-up).

Strategies agency plans to implement to sustain the agency or program(s) in future years

City support will be used to scale a defined set of community engagement and safety education activities during the one-year term and strengthen the partnerships, tools, and measurable outcomes needed to sustain the program beyond FY 2027. Sustain Charlotte will pursue a diversified sustainability strategy that includes individual donors, corporate partners, and

foundation support, using the program’s documented reach and outcomes as evidence for renewed and expanded support. We will also formalize partner relationships (schools, community organizations, neighborhood groups) so components of the program can be replicated and supported through future sponsorships and grants independent of City funding.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Increase micromobility ridership; Decrease bike & pedestrian fatality & serious injury rate	Guided Safe Streets Walks/Rides delivered	8
Increase transit ridership; Decrease bike & pedestrian fatality & serious injury rate	Partner-hosted safety & mobility trainings delivered	12
Decrease bike & pedestrian fatality & serious injury rate	Documented safety findings summaries shared	10
Increase transit and micromobility ridership; Decrease bike & pedestrian fatality & serious injury rate; Decrease the percent of workers driving alone to work	Residents reached (unduplicated)	500
Increase transit and micromobility ridership; Decrease bike & pedestrian fatality & serious injury rate; Decrease the percent of workers driving alone to work	Mobility coaching interactions completed	250

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	n/a - new program	n/a - new program	\$45,000	\$45,000	\$45,000	100%
Merit	n/a - new program	n/a - new program	\$0	\$0	\$0	0%
Benefits	n/a - new program	n/a - new program	\$10,000	\$10,000	\$10,000	100%
Subtotal Personnel Expenses	\$0	\$0	\$55,000	\$55,000	\$55,000	100%
Operating						
Capital Equipment (e.g. vehicles, computers)	n/a - new program	n/a - new program	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)	n/a - new program	n/a - new program	\$12,000	\$12,000	\$12,000	100%
Facilities (e.g. rent, utilities)	n/a - new program	n/a - new program	\$2,000	\$2,000	\$2,000	100%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Office Supplies	n/a - new program	n/a - new program	\$1,000	\$1,000	\$1,000	100%
Travel & Training	n/a - new program	n/a - new program	\$1,000	\$1,000	\$1,000	100%
Technology	n/a - new program	n/a - new program	\$7,000	\$7,000	\$7,000	100%
Contracted services (program support + social media execution)	n/a - new program	n/a - new program	\$10,400	\$10,400	\$10,400	100%
Translation/Interpretation (as requested)	n/a - new program	n/a - new program	\$5,000	\$5,000	\$5,000	100%
Participant supports (refreshments + limited transit passes)	n/a - new program	n/a - new program	\$3,000	\$3,000	\$3,000	100%
Event safety supplies/visibility items/clipboards, etc	n/a - new program	n/a - new program	\$2,000	\$2,000	\$2,000	100%
Permits/insurance/event incidentals	n/a - new program	n/a - new program	\$1,600	\$1,600	\$1,600	100%
Subtotal Operating Expenses	\$0	\$0	\$45,000	\$45,000	\$45,000	100%
Total Expenditures	\$0	\$0	\$100,000	\$100,000	\$100,000	100%
Net Revenues	\$0	\$100,000	\$0	\$0		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2026 Projected Budget
Government Grants & Funding - Federal/State	n/a - new program	n/a - new program	\$0	\$0
City Funding (financial partner or otherwise)	n/a - new program	n/a - new program	\$100,000	\$100,000
Mecklenburg County Funding	n/a - new program	n/a - new program	\$0	\$0
Foundation Grants & Funding	n/a - new program	n/a - new program	\$0	\$0
Donor Contributions	n/a - new program	n/a - new program	\$0	\$0
Service Fees	n/a - new program	n/a - new program	\$0	\$0

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2026 Projected Budget
Other Revenue	n/a - new program	n/a - new program	\$0	\$0
Total Revenues	\$0	\$0	\$100,000	\$100,000

Current Board of Directors

Ray Addison	Betsy Chew Bodien	James Cass
Jolaine Elie	Joni Emry	Michael Gander
Vaama Joshi	Hannah O'Connor	Philip Otienoburu
Nicholas Sanford-Vu	Bill Staton	

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FY 2027 Financial Partner Agency Summary

The NEO Foundation

Agency Description

The NEO Foundation was established by Kenneth Smith, President and Founder of Grace Mar Services Inc., to address community challenges at the macro and strategic level. The Foundation serves as an innovation and systems-change partner, working alongside organizations, public agencies, and national thought leaders to uncover solutions to complex social, economic, and structural problems. Using a systems-thinking approach and methodologies such as RP3 Strategies, NEO focuses on identifying root causes, mapping long-term impacts, and co-designing interventions that create equitable and sustainable change across communities.

Current Financial Partner?

No

Agency Established

2020

FY 2027 Funding Request

\$50,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
Not Provided	\$50,000	100%

Funding Request Category

Overall Agency Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Financial Statements	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✔	✔	✔	✔	✔	✔	✔	✔	✔

Submitted - ✔

Incomplete - ◇

Not submitted - ✘

Application Scoring

Total Score: 72 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	17	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	9	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	13	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	9	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	12	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	9	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	3	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

The NEO Foundation serves communities broadly, focusing on individuals and groups impacted by systemic, structural, or policy-driven inequities. Our work is not limited to a single neighborhood, demographic, or sector; instead, we support anyone affected by gaps in opportunity, access, mobility, or representation. Because systems issues cut across geography, race, income, age, and ability, our population includes residents, families, workers, business owners, institutions, and stakeholders whose outcomes are shaped by the city’s social, economic, and policy environments. Through root-cause analysis, systems mapping, and RP3 Strategies, we work to ensure that equity, inclusion, and shared benefit are built into the design of major initiative, particularly those with citywide impact. Our direct population is, therefore, the full spectrum of communities in Charlotte and surrounding regions whose lives can be improved when systems function more fairly, transparently, and sustainably.

Describe the activities that will be supported through requested city funding

City funding will support the deployment of the NEO Foundation’s proven community-engagement and systems-analysis model first demonstrated in the 2018-2023 Learning From the Future study on race and relationships in Charlotte. That project engaged more than 2,500 residents across five

years, generated deep community-sourced insights, and produced recommendations that helped illuminate structural barriers, hidden feedback loops, and leverage points for equitable change. Using that same RP3 Strategies framework, the NEO Foundation will facilitate a coordinated, citywide engagement and analysis process focused on the recently approved transportation plan. Our activities will include:

- Large-scale community listening sessions across neighborhoods most impacted by mobility, affordability, and displacement pressures
- Story-capture and narrative analysis, enabling residents to describe real lived conditions, transportation challenges, and desired outcomes in their own words, similar to the narrative-based approach that revealed core themes in the 2018-2023 race and relationships study
- Systems mapping and root-cause analysis to identify the drivers of transportation inequity, displacement risks, and misaligned incentives within the current mobility ecosystem
- Cross-sector collaboration with community partners, institutions, and thought leaders to synthesize data, validate patterns, and co-design solutions
- Development of actionable recommendations to ensure that implementation of the transportation plan is inclusive, community-informed, and focused on preventing displacement while expanding access, opportunity, and long-term benefit
- Regular reporting and public-facing briefs that translate community voice into clear insights for policymakers and city leadership
- Engagement of the more than 40,000 Charlotte residents already served by Grace Mar Services and its partners, expanding reach and ensuring inclusion of individuals historically left out of transportation decision-making

This approach mirrors the outcomes of the 2018-2023 study, which demonstrated that when community voice is elevated early, systems-level blind spots are reduced, trust improves, and long-term equity outcomes become measurable and achievable. By applying the same model to Charlotte's transportation referendum, the City will gain a structured, repeatable, and evidence-driven process to ensure that residents are not displaced, and that all communities participate in, shape, and benefit from the city's transportation future.

Strategies agency plans to implement to sustain the agency or program(s) in future years

The NEO Foundation's work is inherently sustainable because our RP3 Strategies process has already been funded, validated, and utilized by major institutions locally, nationally, and globally. The organizations referenced, Foundation For The Carolinas, the Mecklenburg County ABC Board, the North Carolina Department of Health and Human Services, and Duke University, have all funded our work previously. Their investment demonstrates both confidence in our methodology and the ongoing demand for systems-level analysis grounded in community voice.

Our previous customers further reinforce our long-term sustainability. International and national entities such as the Country of Dubai, the U.S. Air Force Thunderbirds, and the New York Federal Reserve have engaged our process to address complex challenges at scale. This global reach shows that our work is not only relevant but highly sought after across diverse sectors and geographies. It positions the NEO Foundation to continually secure new partnerships, multi-year contracts, and philanthropic investments that extend far beyond the scope of a single fiscal year of city funding.

Going forward, we will sustain this program through:

- Continued engagement with philanthropic partners who have already invested in our work
- State and institutional contracts grounded in long-standing partnerships

- Fee-for-service projects applying RP3 Strategies to mobility, equity, and systems change
 - National and international consulting collaborations that generate diversified revenue
- City funding will catalyze and accelerate this next phase of work, but our track record makes it clear: the NEO Foundation has the relationships, reputation, and global demand necessary to secure future funding and sustain this initiative well beyond one fiscal cycle.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Our objective is to ensure the transportation referendum is implemented equitably by elevating community voice, identifying systemic risks, and preventing displacement.	Success will be measured by the number and diversity of residents engaged, the volume of stories collected, and the completion of a clear systems map outlining equity risks.	We will engage 500 residents and capture 200 community narratives to inform a comprehensive systems analysis.

Overall Agency Budget

Not provided

Current Board of Directors

Kenneth Smith
 Richard Ross
 Elaine Blake
 Grace Smith

Workforce and Business Development

OUTCOME

Building and maintaining a successful business climate and workforce talent, including the number of jobs with sustainable wages/benefits; economic opportunity for all residents; and encouraging business development, innovation, and entrepreneurship.

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FY 2027 Financial Partner Agency Summary

Basil Business Group

Agency Description

Basil Business Group (BASIL) is a 501(c)(3) nonprofit empowering families, especially mothers, to increase income and literacy through cosmetology, entrepreneurship, and storytelling.

Program Overview

Program Title: Creative Roots: Incubator for Moms in Beauty & Books

Duration: 12-week program (two cohorts per year)*

Service Area: Charlotte, NC, partnering with community centers, libraries, and MWBE salons.

Program Summary

Creative Roots is a 12-week incubator helping mothers build income through cosmetology, entrepreneurship, and literacy. The program combines salon skills, business education, and family reading engagement. BASIL's approach promotes financial independence, parent-child bonding, and community growth.

Activities

Cosmetology & Retail Skills: Hands-on styling, sanitation, and client care.

Business Basics: Pricing, budgeting, and marketing fundamentals.

Family Literacy: "Stories & Scissors" sessions and take-home reading kits.

Support Services: Childcare stipends and flexible scheduling.

Current Financial Partner?

No

Agency Established

2023

FY 2027 Funding Request

\$6,000

Overall Agency Budget	FY2027 Request Program	
\$21,000	\$6,000	29%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Financial Statements	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 72 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	14	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	10	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	13	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	12	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	10	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	9	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	4	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Mothers and caregivers in under-resourced Charlotte neighborhoods, prioritizing Black and marginalized families seeking workforce and entrepreneurship pathways.

Describe the activities that will be supported through requested city funding

Instructor stipends, childcare stipends, and training supplies for the 12-week Creative Roots incubator program.

Strategies agency plans to implement to sustain the agency or program(s) in future years

The program will sustain through grants, earned revenue from retail demos and pop-ups, and partnerships with MWBE salons and local colleges. BASIL maintains diversified funding including Creative Growth grants, donations, and in-kind contributions.

Performance Measures and Targets

Objective	Measure	FY20267 Target
Objective Measure Target Increase workforce skills for mothers	# of participants completing the 12-week incubator	32 of 40 (80%)
Promote economic mobility	# of graduates earning income from beauty services	24 within 90 day
Improve family literacy	# of parent-child reading minutes logged	1,000+ minutes
Advance MWBE engagement	# of local MWBE vendors/partners	5 active partners

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$0	\$0	\$0	\$0	\$0	0%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$0	\$0	\$0	\$0	\$0	0%
Subtotal Personnel Expenses	\$0	\$0	\$0	\$0	\$0	0%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$500	\$1,000	\$1,000	\$500	50%
Communications (e.g. publishing, marketing)	\$200	\$500	\$1,000	\$1,000	\$500	50%
Facilities (e.g. rent, utilities)	\$300	\$1,000	\$2,000	\$2,000	\$500	25%
Office Supplies	\$500	\$1,000	\$2,000	\$2,000	\$500	25%
Travel & Training	\$0	\$500	\$500	\$500	\$250	50%
Technology	\$0	\$1,000	\$1,500	\$1,500	\$750	50%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Other: Instructor Stipends	\$5,000	\$7,500	\$8,000	\$8,000	\$1,000	13%
Other: Childcare and transportation stipend	\$1,000	\$2,000	\$3,000	\$3,000	\$1,000	33%
Other: program supplies and literacy kits	\$500	\$1,000	\$2,000	\$2,000	\$1,000	50%
Subtotal Operating Expenses	\$7,500	\$15,000	\$21,000	\$21,000	\$6,000	29%
Total Expenditures	\$7,500	\$15,000	\$21,000	\$21,000	\$6,000	29%
Net Revenues	\$0	\$0	\$0	\$0		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2026 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$20,000	\$20,000	\$0
City Funding (financial partner or otherwise)	\$0	\$0	\$0	\$6,000
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding	\$500	\$0	\$1,000	\$21,000
Donor Contributions	\$0	\$0	\$0	\$0
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0
Total Revenues	\$500	\$20,000	\$21,000	\$27,000

Current Board of Directors

Jasmine Pugh
Ivan Rushen

FY 2027 Financial Partner Agency Summary

Cappa, Inc.

Agency Description

Cappa Inc. (The Pouring Project) is a Charlotte nonprofit dedicated to advancing education, wellness, and economic mobility for residents facing disability, health disparities, and financial barriers. We empower individuals and families through inclusive programming, equity-focused supports, and workforce development initiatives that strengthen neighborhoods and create sustainable pathways to stability and self-sufficiency.

Current Financial Partner?

No

Agency Established

2020

FY 2027 Funding Request

\$45,000

Overall Agency Budget	FY2027 Request Program	
\$150,000	\$45,000	30%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Financial Statements	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
X*	✓	X	X	X*	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - X

*FY23 and FY24, organization remained inactive with no programmatic or financial operations

Application Scoring

Total Score: 65 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	14	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	13	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	14	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	9	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	5	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	8	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	2	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Residents of Charlotte who experience economic, health, or developmental barriers, including low-income families, neurodiverse children and their caregivers, young adults seeking workforce opportunities, and individuals facing health disparities or limited access to behavioral health and supportive services.

Describe the activities that will be supported through requested city funding

Requested City funding will directly support the launch and delivery of Cappa Inc.’s Workforce Development Initiative, a no-cost training and employment pipeline designed to prepare Charlotte residents for high-demand careers in behavioral health, developmental services, and community wellness. City support will fund the following activities:

1. Workforce Training & Credential Preparation

City funding will support training activities that prepare participants for credentials such as:

- Registered Behavior Technician (RBT)
- Behavioral Health Technician (BHT)
- Community Health Worker (CHW)
- Family Navigator/Peer Support roles

Activities include:

- Instructor-led training
- Competency-based skill development
- Exam preparation
- Supervised practice hours
- Casework and coaching support

2. Participant Support & Program Accessibility

City funding will ensure the program remains free and accessible, removing the financial barriers that prevent underserved residents from pursuing healthcare careers. Funding will cover:

- Training materials
- Technology access for hybrid/virtual participation
- Printed resources and workbooks
- Translation or accessibility supports
- Childcare-friendly scheduling options
- Assistance for low-income participants who need wraparound support to complete training

3. Workforce Readiness & Job Placement Activities

Funds will support structured workforce readiness modules that help participants secure employment, including:

- Resume development and interview coaching
- Job readiness workshops
- Professional soft-skills training
- Onboarding support for first-time healthcare workers
- Employment matching with local agencies
- Partnership development with Charlotte employers

These activities directly contribute to the City's economic mobility goals.

4. Program Staffing and Facilitation

City funds will partially support the personnel required to deliver the program, such as:

- Program Coordinator / Trainer
- Workforce Readiness Facilitators
- Administrative and compliance support
- Data tracking and performance reporting required by the City

This ensures professional, consistent service delivery and high-quality training outcomes.

5. Community Outreach & Recruitment in Priority Neighborhoods

Funding will allow targeted engagement in neighborhoods disproportionately impacted by:

- Economic instability
- Health disparities
- Developmental service shortages
- Limited access to workforce pathways

Activities include:

- Community info sessions
- Outreach events
- Printed and digital education materials
- Collaborations with local schools, nonprofits, and community centers

6. Data Collection, Reporting & Evaluation

City funds will support required reporting and evaluation activities, including:

- Tracking enrollment, completion, placement, and certification outcomes
- Monitoring access and equity measures
- MWBE utilization tracking
- Mid-year and year-end performance reporting

These activities ensure accountability and alignment with City Council strategic priorities.

Overall, City funding will make it possible for Cappa Inc. to remove financial barriers for residents, expand access to training that leads to meaningful employment, strengthen the behavioral-health workforce, and support families across Charlotte, advancing the City's priorities of Workforce & Business Development, Safe Communities, and Great Neighborhoods.

Strategies agency plans to implement to sustain the agency or program(s) in future years

Cappa Inc. is committed to sustaining the Workforce Development Initiative beyond the initial year of City support. The requested City funding will help launch and stabilize the program in FY27, and over the next 12-24 months, we will diversify revenue and develop long-term financial partnerships to ensure continuity and growth. Our sustainability strategy includes:

1. Employer and Agency Sponsorships

We are establishing fee-based and sponsorship partnerships with Charlotte-area behavioral health agencies, autism centers, early childhood programs, and healthcare employers who directly benefit from a trained workforce.

Future revenue will come from:

- Paid employer partnerships
- Co-funded training cohorts
- Sponsorship of training materials or participant stipends

2. Foundation and Corporate Grant Expansion

Cappa Inc. will pursue multi-year grants from:

- Local and regional foundations
- Corporate philanthropy programs
- Health equity, education, and workforce development funders

These grants will support program staffing, training materials, and participant supports.

3. Diversified Fundraising Through The Pouring Project

As the charitable arm of Cappa Inc., The Pouring Project will expand:

- Individual donor giving
- Annual community fundraising campaigns
- Giving Tuesday initiatives
- Support from faith-based partners

These sources will provide unrestricted funds to sustain program operations.

4. University and Community College Partnerships

We plan to formalize partnerships with:

- UNCC
- CPCC
- Queens University

- Johnson C. Smith University

Cappa Inc. will leverage student interns, practicum placements, and co-developed training modules supported through institutional funding and educational workforce grants.

5. Fee-for-Service Pathways (Long-Term)

While the program will remain free for participants, Cappa Inc. will develop long-term cost-recovery strategies such as:

- Employer-paid onboarding training
- Continuing education modules
- Specialized professional workshops

These options will help generate revenue without creating barriers for low-income residents.

6. Program Integration With The Lemonade Center Ecosystem

The Lemonade Center and its associated behavioral health services expect rising workforce needs. Over time, the Center may:

- Fund participant stipends
- Support instructor costs
- Co-sponsor training cohorts
- Provide in-kind support (space, supervision, technology)

This internal workforce pipeline increases sustainability.

7. Multi-Year Strategic Philanthropy Plan

Cappa Inc. will build a multi-year giving strategy that includes:

- Recurring donors
- Major gift cultivation
- Corporate community investment partnerships

This creates long-term unrestricted support for program stability.

Summary Closing Statement

City funding will provide the foundation needed to launch and stabilize this high-need workforce pipeline. By year two, the program will be supported through a diversified blend of employer partnerships, philanthropic grants, institutional collaborations, donor giving, and cost-sharing strategies. These efforts ensure that the Workforce Development Initiative remains free, accessible, and sustainable well beyond the grant period.

Performance Measures and Targets

Objective	Measure	FY2026 Target
Prepare Charlotte residents for high-demand roles in behavioral health and community support services.	Number of individuals enrolled in the Workforce Development Initiative.	25 Participants enrolled
Ensure successful completion of workforce training.	Number of participants who complete all required training components.	20 Program Completions

Objective	Measure	FY2027 Target
Increase the number of credentialed paraprofessionals serving Charlotte communities.	Number of participants who earn an industry-recognized credential (e.g., RBT, BHT, CHW, Family Navigator).	15 Participants Credentialed
Support job placement and economic mobility for program graduates.	Number of participants placed into employment within 90 days of program completion.	12 Job Placements
Strengthen local service capacity through employer partnerships.	Number of Charlotte-based organizations engaged as training or placement partners.	5 active partnerships
Maintain accountability and compliance with City reporting requirements.	Submission of complete mid-year and year-end performance reports.	100% of required reports submitted on time

Overall Program Budget

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$0	\$0	\$0	\$35,000	\$25,000	71%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$0	\$0	\$0	\$5,000	\$5,000	100%
Subtotal Personnel Expenses	\$0	\$0	\$0	\$40,000	\$30,000	75%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)	\$0	\$0	\$0	\$5,000	\$2,000	40%
Facilities (e.g. rent, utilities)	\$0	\$0	\$0	\$10,000	\$5,000	50%
Office Supplies	\$0	\$0	\$0	\$3,000	\$2,000	67%
Travel & Training	\$0	\$0	\$0	\$5,000	\$3,000	60%
Technology	\$0	\$0	\$0	\$7,000	\$0	0%
Other:	\$0	\$0	\$0	\$10,000	\$3,000	30%
Subtotal Operating Expenses	\$0	\$0	\$0	\$40,000	\$15,000	38%
Total Expenditures	\$0	\$0	\$0	\$80,000	\$45,000	56%
Net Revenues	\$0	\$0	\$80,000	\$0		

Revenues				
	FY2025 Actual	FY2026 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner or otherwise)	\$0	\$0	\$0	\$45,000
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding	\$0	\$0	\$0	\$15,000
Donor Contributions	\$0	\$0	\$0	\$20,000
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0
Total Revenues	\$0	\$0	\$0	\$80,000

Current Board of Directors
Not provided

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FY 2027 Financial Partner Agency Summary

Carolina Youth Coalition

Agency Description

Carolina Youth Coalition (CYC) is a Charlotte-based college access nonprofit dedicated to nurturing and propelling high-achieving, under-resourced students to and through college. Since 2018, CYC has shifted the trajectory of more than 750 high school students, with over 70% attending college debt-free. Through comprehensive curricula and wraparound supports, CYC empowers students (Fellows) with the academic, financial, and social capital tools needed to identify and gain admission to a best-fit choice, navigate higher education, graduate with zero to minimal debt, and enter the workforce as confident, capable, community-minded leaders.

Current Financial Partner?

Yes

Agency Established

2018

FY 2027 Funding Request

\$125,000

FY27 Projected Overall Agency Budget	FY2027 Request Agency	
\$2,676,752	\$125,000	4%

Funding Request Category

Overall Agency Budget

Total years financial partner with City of Charlotte

2 years

Funding History

FY2025	FY2026
\$100,000	\$100,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✔	✔	✔	✔	✔	✔	✔	✔	✔

Submitted - ✔

Incomplete - ◇

Not submitted - ✘

Application Scoring

Total Score: 96 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	15	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	18	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	14	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	15	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

CYC serves high-achieving, under-resourced students in Charlotte, with a focus on first-generation college students and those from families earning \$60,000 or less (Pell Grant eligible). Since 2018, Fellows' median household income has been \$38,000; 80% identify as first-generation and 75% are Pell-eligible. To date, CYC has served 770 high school students and 302 college students from 78 high schools across 57 zip codes, reflecting the geographic breadth of opportunity gaps across Charlotte.

Despite the transformative power of a degree, associated with improved health, higher earnings, and civic engagement, systemic barriers persist:

- Only 14% of low-income students who start college earn a degree.
- Only 11% of low-income, first-generation students graduate within six years.

- First-generation students graduate at 25%, compared to 59% of their peers.
- Just 27% of first-generation students graduate within four years.
- Charlotte-Mecklenburg Schools' 232:1 student-to-college counselor ratio severely limits access to high-quality guidance.

These pervasive challenges are why CYC exists. CYC's scalable, proven model provides multi-year academic, financial, and workforce-aligned supports that promote long-term economic mobility for Charlotte's youth.

Describe the activities that will be supported through requested city funding

CYC requests \$125,000 in general operating support to sustain and expand our continuum of college access and college success programs, which propel Fellows to and through college and into fulfilling, sustainable careers. This investment will directly support our goal of serving 400 Fellows this year and help us reach our strategic objective of serving 500 Fellows annually by FY2028, contributing to Charlotte's long-term talent and workforce pipeline.

CYC delivers two free, research-informed, multi-year curricula designed to remove the academic, financial, and social barriers that prevent high-achieving under-resourced youth from thriving.

The College Access Program (Grades 9-12):

CYC prepares Fellows for postsecondary success through best-in-class college counseling and standardized test prep, intensive academic tutoring and development, writing coaching, 1:1 mentorship, and college tours. Fellows also participate in career exploration and social capital-building experiences through company partner visits, networking events, and immersive learning opportunities.

Impact Stories:

- Honeywell AI App Building Challenge

This fall, 75 Fellows participated in identifying a meaningful real-world problem and designing an app to help solve it using a combination of AI tools and MIT's App Inventor. Teams were tasked with thinking critically about problem-solving, user needs, and how to leverage emerging technologies to drive community impact. Fellows first engaged in an immersive AI workshop led by Honeywell, where Fellows learned foundational AI concepts and explored practical industry applications. Fellows presented their final app to a panel of judges featuring innovative, community-centered solutions in food bank accessibility, youth mental health, financial literacy, and educational access, with the opportunity to win a day shadowing an AI expert at Honeywell.

- ALUMNight at Bank of America

CYC hosted its annual networking and career development event at Bank of America, connecting 80 Fellows, CYC Alumni, mentors, and corporate partners. ALUMNights helps Fellows build early-career networks, demystify professional pathways, gain exposure to them, and expand the social capital needed for long-term mobility.

2024-2025 Impact:

- 344 Fellows served (a 36% increase from last year).

- 77% of Fellows were first-generation college students, and 80% Pell-eligible.
- 5-point average ACT growth among seniors due to intensive test preparation.
- 99% senior best-fit college enrollment rate following graduation.
- 68% of seniors are projected to attend and graduate from debt-free, significantly reducing barriers to postsecondary success.

The College Success Program (Postsecondary):

CYC supports its high school graduates, College Fellows, as they enter college, persist, graduate, and launch their careers. Services include personalized case management, career coaching, emergency financial support, on-campus peer ambassadors, and campus visits. The program ensures Fellows successfully enter the workforce.

Impact Stories:

- Peer Campus Ambassadors

This fall, CYC launched ambassadors at Wake Forest, UNC-Chapel Hill, and A&T. These student leaders provide peer-to-peer support while gaining mentorship, program facilitation, and leadership experience, enhancing our CYC community connection on campuses and strengthening their own workforce readiness.

- College Send-Off with CPI Security

Sixty-five College Fellows engaged in a CPI-led professional panel and networking session, received professional headshots, and connected with career experts from various backgrounds. CYC's annual event boosts Fellows' confidence as they enter college and broadens their network.

2024-2025 Impact

- 209 College Fellows were supported through case management and career coaching.
- CYC Alumni earn 45% more than their parents' household income, demonstrating upward mobility in action.
- 97% of first-year College Fellows and 93% of upperclassmen remained on track to graduate.
- 97% of College Fellows graduate from a best-fit choice, emphasizing the effectiveness of sustained, high-touch support.

CYC's programs intentionally develop a pipeline of talented young people who graduate as well-equipped, skilled professionals prepared to enter and excel in the workforce. Critical elements of our curriculum empower Fellows to identify and pursue career pathways aligned with their strengths and interests. We support Fellows in developing workplace skills and knowledge, provide networking opportunities that connect them with professionals who can expand their networks and expertise, and offer workshops that introduce them to potential careers they may not have considered. Ultimately, alumni of our program emerge as confident, innovative, and empathetic leaders, ready to enter the workforce and make meaningful contributions to their communities.

The City of Charlotte’s investment directly strengthens a diverse, homegrown talent pipeline and advances equitable economic development. By helping Fellows graduate with zero to minimal debt and launch competitive, sustainable careers, CYC contributes to Charlotte’s long-term economic vitality. It ensures that the region’s future workforce reflects the diversity and strengths of the communities it serves.

Strategies agency plans to implement to sustain the agency or program(s) in future years

CYC’s long-term sustainability is grounded in a diversified revenue model, consistent partner retention, and multi-year philanthropic commitments. Our operating portfolio includes corporate contributions, individual donors, private foundations, and local government support. In 2024, CYC successfully completed a \$10 million Flourishing Fund capacity campaign, which strengthened our financial position, expanded individual giving, and secured multi-year pledges that ensure continued program sustainability.

We maintain strong relationships with corporate and foundation partners, including Honeywell International, Albemarle Corporation, Bank of America, CPI Security, the Leon Levine Foundation, and many others, who invest in both financial support and employee engagement to enrich Fellows’ career exposure. These multi-sector partners reinforce CYC’s sustainability by providing recurring contributions, volunteer mentorship, experiential learning, and recruitment opportunities.

CYC will continue to grow its development capacity by expanding its major gifts strategy, strengthening its recurring donor programs, and increasing its grant-writing capacity. Additional sustainability strategies include:

- Strategic Staffing: Transitioning a staff member to the role of Senior Director of Data & Grants Management enables the Development Director to focus on cultivation and stewardship, thereby enhancing donor retention.
- Ongoing Capacity Building: Integration of campaign funds into long-term operations supports program growth toward serving 500 Fellows annually by FY2028.

CYC’s proven effectiveness and valued partnerships position the organization for sustained growth and adaptability. City funding will enable CYC to continue delivering robust academic and career support that shapes Charlotte’s future leaders and helps ensure every student, regardless of income or access, can achieve a thriving career and a flourishing life.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
By May 2027, 70% of CYC college graduates will secure competitive employment or enroll in a postsecondary education program.	The number of college graduates with confirmed employment or postsecondary enrollment divided by the total number of CYC college graduates in the most recent academic year.	0%	70%
By May 2027, 90% of CYC college students will remain on track to complete a degree within 150% of the time.	The number of college students on track for on-time degree completion divided by the total number of enrolled College Fellows.	94%	90%
By May 2027, 96% of CYC high school seniors will submit a completed Free	The number of high school seniors who submit the Free Application for Federal Student Aid	87%	96%

Objective	Measure	FY2026 Mid-year	FY2027 Target
Application for Federal Student Aid.	divided by the total number of enrolled CYC high school seniors.		
By May 2027, 96% of CYC high school seniors will be awarded financial aid and/or scholarships to attend college.	The number of high school seniors awarded financial aid and/ or scholarships to attend college divided by the total number of enrolled CYC high school seniors.	80%	96%
By May 2027, 75% of CYC college students will have borrowed less than the North Carolina state average of \$9,000 or less.	The number of college students attending college and on track toward degree completion divided by the number of enrolled college students in CYC. (Discontinued in FY27).	New Measure	75%

Overall Agency Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$831,275	\$1,149,468	\$1,291,575	\$1,330,322	\$65,000	5%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits, insurance, and other related taxes	\$195,589	\$263,755	\$246,630	\$254,030	\$0	0%
Subtotal Personnel Expenses	\$1,026,864	\$1,413,223	\$1,538,205	\$1,584,352	\$65,000	4%
Operating						
Administrative Expenses	\$102,306	\$161,306	\$107,610	\$110,840	\$0	0%
Office and Occupancy	\$141,312	\$186,581	\$178,860	\$184,230	\$0	0%
Future Fellows Program Expenses		\$4,588	\$12,230	\$12,600	\$0	0%
College Access Program Services and Supplies	\$140,502	\$143,999	\$184,440	\$189,970	\$0	0%
College Success Program Services and Supplies	\$32,365	\$26,708	\$49,150	\$50,630	\$20,000	40%
Financial Habits Program		\$101	\$25,500	\$26,270	\$0	0%
Program Support Expenses	\$22,529	\$44,479	\$47,700	\$49,130	\$15,000	31%
Scholarships		\$89,123	\$125,000	\$128,750	\$0	0%
Community Programs and Special Events	\$69,824	\$56,276	\$46,000	\$47,380	\$15,000	32%
Fundraising Events and Consulting Fees	\$202,279	\$116,845	\$123,000	\$126,690	\$0	0%
Research and Evaluation	\$3,848	\$487	\$1,000	\$1,000	\$0	0%
Marketing	\$30,076	\$23,510	\$35,000	\$36,050	\$0	0%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Technology Expenses	\$16,076	\$33,967	\$62,000	\$63,860	\$5,000	8%
Transportation, fuel, maintenance, and registration	\$23,975	\$25,431	\$32,760	\$33,740	\$5,000	15%
Licensure and Professional Development	\$23,415	\$33,827	\$30,350	\$31,260	\$0	0%
Subtotal Operating Expenses	\$808,507	\$947,228	\$1,060,600	\$1,092,400	\$60,000	5%
Total Expenditures	\$1,835,371	\$2,360,451	\$2,598,805	\$2,676,752	\$125,000	5%
Net Revenues	\$7,431,281	\$596,356	-\$1,049,205	-\$1,083,664		

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (Financial Partner and Otherwise)	\$10,000	\$100,000	\$100,000	\$100,000
Mecklenburg County Funding	\$89,469	\$25,000	\$0	\$0
Foundation Grants & Funding	\$1,435,550	\$404,780	\$255,000	\$262,650
Donor Contributions	\$2,883,003	\$628,347	\$489,600	\$504,288
Service Fees	\$0	\$0	\$0	\$0
Other Revenue/Corporate	\$4,848,630	\$1,798,680	\$705,000	\$726,150
Total Revenues	\$9,266,652	\$2,956,807	\$1,549,600	\$1,593,088

Current Board of Directors

Kathryn Kissam
 Steve Boland, II
 Mark Mealy
 Malinda Gill

Katie Ross Austin
 Natalie Alston
 Matt Magan
 Melissa Anderson

Danielle Nisbet
 LaShonda Fuselier
 Molly Shaw

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FY 2027 Financial Partner Agency Summary

Carolinas Asian American Chamber of Commerce

Agency Description

In 1999, the Carolinas Asian-American Chamber of Commerce (CAACC) was founded from a growing need for unity, visibility, and support within Charlotte’s expanding Asian community. At a time when Asian representation was limited, CAACC took shape as a hub for entrepreneurs and professionals, helping them connect, collaborate across a broad spectrum of industries.

Today, CAACC continues to serve as the region’s leading advocate for Asian-American business and community development. Our work spans support for entrepreneurs, small and medium-sized enterprises, nonprofits, cultural and educational organizations, and corporations committed to strengthening their supplier diversity efforts. Central to our mission is advancing economic opportunity, preserving cultural identity, and enriching community engagement throughout Charlotte and the Carolinas.

By fostering dialogue, building partnerships, and creating shared platforms, CAACC continues to expand economic pathways, promote cultural understanding, and deepen community connections. Through this work, we ensure that Asian-American voices are not only included but actively shape the future of our broader community.

Current Financial Partner?

Yes

Agency Established

1999

FY 2027 Funding Request

\$100,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$186,500	\$100,000	53.62%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

2 years

Funding History

FY2025	FY2026
\$100,000	\$100,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Financial Statements	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✗	✓	✓	✗	◇	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 73 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	15	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	10	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	14	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	10	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	12	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	9	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	3	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

60,000 plus in the city of Charlotte, and the surrounding towns.

Describe the activities that will be supported through requested city funding

Our primary focus remains workforce development, specifically Asian business support and skilled-trade training for young adults from the most underserved Asian communities. Building on our existing efforts, we plan to expand our scope to include the following activities:

1. Skilled-Trade Career Alignment

Provide individuals interested in skilled-trade training with tools to better understand their personality strengths and identify the trade areas most compatible with their interests and aptitudes.

2. Pilot Soft-Skills Development for Asian Professionals

Launch a pilot program focused on soft-skills development for Asian professionals. While Asians represent approximately 12% of employees in Fortune 100 companies, they account for fewer than 4% of senior management roles. This initiative will engage this population for the first time to explore the benefits of mindfulness, stress management, interpersonal communication, collaborative leadership, and career advancement.

All requested FP funding will be dedicated exclusively to supporting these two workforce development initiatives.

Strategies agency plans to implement to sustain the agency or program(s) in future years

To ensure the long-term sustainability of our workforce development programs—currently supported in significant part by the City Financial Partner (FP) grant of \$100,000—we will implement a diversified funding strategy that reduces reliance on City funding in future years.

Our sustainability approach includes the following strategies:

1. Reallocation of Existing Revenue

Redirect \$26,000 from existing organizational revenue streams to partially replace City FP funding.

2. Development of New Funding Sources

Expand non-City revenue through membership-based fundraising initiatives, \$20,000, and the cultivation of new corporate and community sponsorships, with a targeted goal of \$40,000.

3. Program Cost Optimization

Reduce the per-participant funding level for skilled-trade enrollees by approximately 20% while maintaining the same overall number of participants, resulting in savings of \$14,000.

Through this balanced approach—combining internal resource reallocation, new external funding, and prudent cost management—we will sustain program delivery and preserve access for underserved participants beyond the City funding period.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Enhance young Asian adults, especially among the underserved group, e.g., Montagnards, Burmese, upward economic mobility, and sustainability through trade-skills training.	Use Meyers-Briggs personality test to assess temperament and aptitude of the candidate for high probability to succeed in his/her chosen field.	New Measure	Participation: 80% plus The remaining will be interviewed to explore and identify best training option
	To Monitor progress- Feedback from instructors Small team meeting to review progress Attend at least 2 job fairs. Visit CLT Works Employer feedback	New Measure	Instructor- Every 3-4 weeks Every 4 weeks Attend 2 job fairs and visit CLT Works 6, 12, 18 months after joining
	During calendar year 2026, will extend enrollment to other underdeveloped groups, Burmese, Cambodians, and others.	New Measure	24 Certificates awarded to 24 trainees at \$3,500 stipend each Budget: \$84,000
Engage the young Asian professional as a pilot project to join a soft-skill workshop for personal development. If successful, expand it to a self-funded program to learn techniques in several critical areas for personal wellbeing and leadership development.	Confirm availability and program options with SIYLI (Search Inside Yourself Learning Institute). Seek input and support from major business Asian BRG in participation in- Introduction Workshop Self-funded individual workshops	New Measure	Introduction workshop- Cohort (group of 30-40) survey- 90% positive Self-funded individual workshop- 50% participation from the cohort group Project budget: \$16,000
Provide infrastructural support to ensure successful outcome of the objectives listed above.	Use of contractors for operational support is planned, consistent with our all-volunteer management policy.	New Measure	Expense for contractors- 15% of the soft-skill development project

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$0	\$0	\$0	\$0	\$0	0%
Merit	\$0	\$0	\$0	\$0	\$0	0%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Benefits	\$0	\$0	\$0	\$0	\$0	0%
Subtotal Personnel Expenses	\$0	\$0	\$0	\$0	\$0	0%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)	\$0	\$0	\$0	\$0	\$0	0%
Facilities (e.g. rent, utilities)	\$0	\$0	\$0	\$0	\$0	0%
Office Supplies	\$0	\$0	\$0	\$0	\$0	0%
Travel & Training	\$0	\$0	\$0	\$0	\$0	0%
Workforce Development	\$0	\$0	\$0	\$0	\$0	0%
Vocational Training	\$0	\$78,360	\$78,360	\$78,360	\$70,000	89%
Soft-Skill workshops for Asian professionals	\$0	\$0	\$16,000	\$16,000	\$0	0%
Small Business support and Development	\$0	\$30,000	\$30,000	\$30,000	\$30,000	100%
Subtotal Operating Expenses	\$0	\$108,360	\$124,360	\$124,360	\$100,000	80%
Total Expenditures	\$0	\$108,360	\$124,360	\$124,360	\$100,000	80%
Net Revenues	\$0	\$0	\$0	\$0		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner or otherwise)	\$0	\$100,000	\$100,000	\$100,000
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding	\$0	\$0	\$0	\$0
Donor Contributions	\$0	\$0	\$0	\$0
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$8,360	\$24,360	\$24,360
Total Revenues	\$0	\$108,360	\$124,360	\$124,360

Current Board of Directors

Not provided

FY 2027 Financial Partner Agency Summary

Community Culinary School of Charlotte

Agency Description

The Community Culinary School of Charlotte (CCSC) provides workforce development training and job placement assistance to adults who face significant barriers to long-term, stable employment. Since 1997, CCSC has offered a reliable and lasting solution to the interconnected challenges of unemployment, hunger, poverty, and homelessness in Charlotte, NC. We address the root cause of poverty rather than the symptoms, unemployment. We do more than hand someone a fish, we teach students how to clean, cook, and sell fish!

CCSC's Workforce Development Program addresses social and economic issues by helping individuals break multi-generational cycles of crisis and dependency. Through an integrated approach that includes culinary arts training, job-readiness coaching, life skills development, and wellness counseling, CCSC equips students with the tools and confidence needed to achieve self-sufficiency and economic mobility. CCSC serves as a support system for adults who are unfamiliar with pathways to success. Each student receives individualized and group support, guided by a plan that sets them on a path toward positive, lasting change. CCSC's workforce training prepares participants for employment in Charlotte's growing hospitality industry, helping them secure stable jobs, earn higher wages, and pursue long-term career advancement or entrepreneurship opportunities.

For over 27 years, CCSC has successfully addressed the root causes of poverty through skill-building and employment. Our training helps students eliminate dependency, improve family stability, and provide the food service industry with trained personnel who contribute to Charlotte's economy. Our program aligns with the restaurant and food service sector, a major contributor to state and local tax bases, where every dollar spent generates \$2.68 in economic activity (National Restaurant Association <https://restaurant.org/research-and-media/research/industry-statistics/state-statistics/>).

CCSC offers 14-week sessions three times per year, serving 60-70 new students and more than 150 alumni annually. Students pay no tuition; however, it costs CCSC \$10,355 per student to provide instruction and support.

CCSC supports the City of Charlotte's strategic priorities by:

- A. Increasing the number of trained workers entering the City's target industries
- B. Supporting graduates in securing family-sustaining wage jobs
- C. Expanding training for women and minorities in the hospitality career pipeline
- D. Developing both hard and soft job skills needed to qualify for in-demand careers

Our core values shape every aspect of the student journey:

Inclusivity: CCSC embraces diversity and inclusivity, welcoming individuals of all races, colors, religions, sexual orientations, and gender identities.

Accountability: We hold students responsible for their success and encourage employers to provide fair, living-wage opportunities that match our graduates' certifications and capabilities.

Sustainability: CCSC's internal revenue streams allow us to provide training and employment opportunities for students and alumni while generating operating income.

Empowerment: Students gain culinary skills, financial literacy, and job-readiness training that build confidence, stability, and the ability to provide for their families, positioning them to become positive role models in their communities.

Service: During training, students and staff prepare more than 5,500 meals each year for community programs in low-income neighborhoods, reinforcing the value of giving back.

Support: From wrap-around services such as referrals for housing, financial aid, and child care, as well as transportation and medical assistance, CCSC ensures each student has the guidance and resources needed to build momentum and create lasting change.

Current Financial Partner?

No

Agency Established

1997

FY 2027 Funding Request

\$38,830

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$1,057,925	\$38,830	3.67%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 95 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18-20 <i>Direct, compelling alignment</i>	14-17 <i>Clear alignment</i>	9-13 <i>General/indirect alignment</i>	0-8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	14	13-15	10-12 <i>Clear; minor gaps</i>	6-9 <i>Underdeveloped</i>	0-5 <i>Vague/unrealistic</i>

Category	Max Points	Score	Excellent	Good	Fair	Poor
			<i>Well-defined; outcome-connected</i>			
Impact & Performance Measures	20	19	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	14	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	15	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	9	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

The Community Culinary School of Charlotte serves adults facing significant barriers to employment and financial stability. Many students come from environments defined by trauma, instability, and limited opportunities, leaving them vulnerable to returning to harmful patterns without a structured path toward positive change.

In 2024, 89% of students were Black, 6% White, 3% Asian, and 2% Latinx. More than half are between the ages of 25 and 44.

In 2025, Charlotte’s poverty rate is 12-13%, with higher rates among single parents and racial minorities. Economic mobility remains a major challenge, recent Leading on Opportunity’s Opportunity Compass analysis indicates declining family stability, meaning fewer children are likely to rise out of poverty. Rising living costs, particularly housing, contribute to this reality. CCSC provides a pathway out of poverty by helping individuals secure stable employment at \$16+/hour, wage levels that support long-term economic independence. A representative from Mecklenburg County Social Services visits weekly to help students access benefits they qualify for but may not be receiving.

The impact of one transformed life extends beyond the individual. When a previously unemployed or homeless person secures full-time employment, they contribute to the tax base, support their families, and build confidence and stability that strengthens entire households and neighborhoods. CCSC sees this transformation every day.

Student demographics reflect the diversity of people we serve:

- 45% qualify for public assistance
- 33% are single parents or financially responsible for children
- 20% lack stable housing
- 17% are in substance abuse recovery
- 13% have been incarcerated
- 6% identify as LGBT
- 3% are Veterans

In 2024, CCSC:

- Received more than 95 applications
- Enrolled 63 students
- Graduated 49 students (78%)
- Provided an additional 90+ alumni with job assistance, references, counseling, meals, transportation vouchers, medical and dental referrals, and financial literacy support

Below is a short story about Amy, a past student and CCSC graduate, and her experience at CCSC.

On May 8, 2024, Amy K. was released from prison after 24 years and 9 months behind bars. Six days later, she started class at CCSC. She found out about the School through the non-profit organization Changed Choices, which assists women who are incarcerated or recently released. “I was 24 when I went to prison. I lived very dangerously and got mixed up with the wrong people. Sometimes, things can just happen, and it can change your life.” Amy says that before prison, she had no drive or determination to accomplish anything in life. She now knows a career path leading to upward mobility is possible in the culinary industry. “I’ve learned that no matter what happens in the world, people will always need to eat!” While in prison, she was able to take courses on culinary topics, though those courses were only bookwork. “The things I was learning in books, I only got to see in my head and on TV; now I have actually done them!” Amy says that food is conversational and brings people together, which is why she feels so drawn to it. Amy says that her time in Class 77 allowed her to learn from the chef instructors while feeling comfortable in a judgment-free environment, which was important to her. “I felt like I could talk to anyone about anything at CCSC, and I loved that.” Since graduating, Amy has been working in a job where she is happy “behind the scenes making the food that people love.”

Describe the activities that will be supported through requested city funding

It costs CCSC \$10,355 to fully train one student. Students do not pay tuition. City funds will directly support core program costs, including:

- Chef instruction
- Job readiness classes
- Life skills coaching
- Culinary tools and supplies
- Textbooks, classroom materials, and ServSafe exam costs
- Chef uniforms (coats, hats, aprons)
- Ingredient and food purchasing for training

- Daily transit passes, which 75% of students need for class attendance and interviews

For nearly three decades, CCSC has strengthened Charlotte’s workforce and economy through its comprehensive Workforce Training Program. Each year, three 14-week training cohorts learn:

- Culinary skills
- Food safety, sanitation, and ServSafe principles
- Knife and cooking techniques
- Kitchen operations (front and back of house)
- Professionalism and employability standards

Students also receive instruction in essential soft skills, including teamwork, communication, stress management, time management, and maintaining physical and mental stamina in the demanding hospitality industry.

CCSC recently completed training with Class 81, who graduated on December 17. Graduates always remain connected to CCSC and are welcome to return for coaching, refresher training, career support, or assistance securing new jobs. Since 1997, CCSC has graduated more than 1,214 adults.

Strategies agency plans to implement to sustain the agency or program(s) in future years

CCSC is strongly positioned for long-term sustainability. We maintain a consistent pipeline of students, a committed instructional team, and nearly 30 years of proven impact in workforce development. Our stability is reinforced by:

- Strong executive leadership
- An experienced, diverse staff (including alumni)
- An engaged and active board of directors
- Longstanding partnerships with workforce, recovery, and community organizations
- Deep employer relationships throughout the regional hospitality industry
- A 28-year track record of successful job placement

Since launching with just two students in an unfinished warehouse in 1997, CCSC has steadily grown. We expanded to dedicated classrooms and offices, launched a catering division in 2001 to employ students and generate revenue, and relocated in 2014 to add a Cafe that provides additional training and income. Today, earned revenue from Café and catering accounts for approximately 28% of organizational funding.

Leadership and staff maintain expertise through continuing education and industry memberships, while the strategic plan and succession plan are reviewed annually. We are annually audited by an independent public accounting firm, comply with North Carolina solicitation statutes, and maintain strong internal accountability and financial controls.

Sustainability also comes from diversified funding sources, including:

- Grants from private foundations and corporations
- Contributions from individuals, businesses, and faith institutions
- Earned revenue from the Cafe and catering

- Team-building cooking classes and Chef's Table events
- Annual fundraising campaigns and holiday events

Following the grant period, we will continue to support our programs with grants, contributions, and earned revenue streams from our Cafe and catering.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Provide financial literacy classes as part of CCSC's curriculum	Count the number of financial classes held for each cohort	Target of 3 financial literacy classes per year
Open CCSC's kitchen and facilities on Fridays for students and alumni to practice their skills and receive assistance in their business endeavors	CCSC staff will track data on kitchen and facility use during accessible days	Target of 3 Fridays per month for CCSC student and alumni to use for entrepreneurial purposes
Increase the number of employers who visit CCSC annually to interview students	Track the number of employers that come to CCSC with a minimum of 3 per cohort	Target of 9 employer visits per year
Increase the number of students who have jobs at graduation	CCSC staff will track data of student employment at graduation for each cohort	CCSC students who have jobs at graduation will increase by 5% to 78%
Maintain 100% pass rate for graduates who take the ServSafe exam	CCSC staff will track ServSafe exam results for each cohort	100% of CCSC graduates who take the ServSafe exam will pass

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$448,394	\$425,975	\$438,755	\$445,971	\$12,781	3%
Merit		\$0	\$0	\$0	\$0	0%
Benefits	\$29,802	\$31,849	\$32,805	\$33,344	\$0	0%
Subtotal Personnel Expenses	\$478,196	\$457,825	\$471,559	\$479,315	\$12,781	3%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$12,851	\$12,839	\$13,224	\$13,620	\$0	0%
Communications (e.g. publishing, marketing)	\$2,390	\$6,264	\$6,452	\$6,646	\$0	0%
Facilities (e.g. rent, utilities)	\$71,521	\$70,383	\$80,062	\$82,463	\$0	0%
Office Supplies	\$1,762	\$2,073	\$2,135	\$2,199	\$0	0%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Travel & Training	\$481	\$560	\$577	\$594	\$0	0%
Technology	\$1,496	\$4,242	\$4,370	\$4,501	\$0	0%
Other: Student supplies and expenses	\$134,652	\$163,694	\$168,605	\$173,663	\$26,049	15%
Other: Professional fees	\$21,498	\$38,407	\$39,559	\$40,746	\$0	0%
Other: Public relations and community meals	\$5,874	\$2,825	\$2,910	\$2,997	\$0	0%
Other: Insurance - WC, D&O, liability	\$10,174	\$5,947	\$6,125	\$6,309	\$0	0%
Other: Bank and merchant fees	\$8,976	\$11,525	\$11,870	\$12,226	\$0	0%
Other: Fundraising expense	\$3,890	\$3,372	\$3,473	\$3,578	\$0	0%
Other: Depreciation	\$0	\$0	\$0	\$0	\$0	0%
Subtotal Operating Expenses	\$275,566	\$322,129	\$339,360	\$349,541	\$26,049	7%
Total Expenditures	\$753,761	\$779,954	\$810,920	\$828,856	\$38,830	5%
Net Revenues	\$230,995	\$153,222	\$346,992	\$329,056		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$255,320	\$263,597	\$271,505	\$279,650
City Funding (financial partner and otherwise)	\$0	\$0	\$0	\$38,830
Mecklenburg County Funding	\$137,984	\$150,678	\$70,000	\$0
Foundation Grants & Funding	\$152,362	\$199,701	\$205,692	\$302,661
Donor Contributions	\$137,336	\$133,003	\$136,994	\$201,576
Other Revenue - Internal revenue streams, Café and Catering sales	\$191,439	\$210,878	\$217,204	\$279,650
Breakage income gift cards	\$0	\$0	\$0	\$0
Employee Retention Credit	\$72,000	\$0	\$0	\$0
Dividends and interest	\$7,049	\$18,382	\$18,934	\$39,004
2023 Auditor adjustments*	\$13,748	\$0	\$0	\$0

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Fundraising	\$17,518	\$12,473	\$12,847	\$16,541
Total Revenues	\$984,756	\$988,712	\$933,176	\$1,157,912

Current Board of Directors

- | | | |
|---------------------|-----------------|-----------------------|
| Paul Burley | Vivek Shah | Chip Wallach |
| Matthew Saylor | Steven Boyd | Suzanna Bumgarner |
| Jacki Cole | Janey Higley | Robbie Howell |
| James Langdon | Milton McGowian | Isabelle Messawer |
| Maggie Hill Palumbo | Wayne Sisk | Chef Alexandra Wright |

FY 2027 Financial Partner Agency Summary

Directions to Discovery

Agency Description

Directions to Discovery Inc. is a nonprofit organization dedicated to empowering young adults with autism and developmental differences as they transition into independent adulthood. The agency provides personalized support through programs focused on life skills, academic and vocational development, social growth, and community integration. Our goal is to create inclusive environments where every individual can discover their strengths, build confidence, and achieve lasting independence.

Current Financial Partner?

No

Agency Established

2024

FY 2027 Funding Request

\$15,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$218,720	\$15,000	7%

Funding Request Category

Overall Agency Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Financial Projections	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
X	✓	✓	✓	✓ *	N/A	X	X	X

Submitted - ✓

Incomplete - ◇

Not submitted - X

*Organization formed in 2024, therefore no financial statements available. Organization provided financial projections

Application Scoring

Total Score: 89 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	20	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	13	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	18	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	12	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	12	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	4	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Directions to Discovery Inc. serves young adults and adolescents diagnosed with autism spectrum disorder (ASD) and related developmental or learning differences. The agency supports individuals who are transitioning from school-based services to greater independence, including those who benefit from assistance with daily living skills, social development, career readiness, and community participation.

Describe the activities that will be supported through requested city funding

Directions to Discovery Inc. offers a variety of structured and individualized activities designed to promote independence, skill development, and community engagement for young adults with autism and related developmental differences. Activities include:

- Life Skills Development: Training in personal care, household management, budgeting, meal preparation, transportation, and other daily living skills.
- Academic Support: Tutoring, study skills, and educational enrichment to support continued learning and achievement.

- Social and Peer Engagement: Group activities, social skills training, and peer interaction to foster relationships and communication skills.
- Career and Vocational Training: Job readiness programs, job placement, career exploration, internship opportunities, and employment support.
- Community Participation: Guided experiences in community settings, recreation, volunteer opportunities, and civic engagement.
- Individualized Support Services: Personalized coaching and mentoring to meet the unique goals and strengths of each participant.
- Family Collaboration: Consultation and support for families to reinforce skills, promote independence, and facilitate smooth transitions.

Strategies agency plans to implement to sustain the agency or program(s) in future years

Directions to Discovery Inc. recognizes that city funding may only be allocated on a one-year basis. To ensure the long-term sustainability of our programs, the agency has developed a multi-pronged strategy:

1. Diversified Funding Sources: We actively pursue alternative funding streams, including state and federal grants, private foundations, and corporate sponsorships. This approach reduces dependence on any single funding source.
2. Fee-for-Service Opportunities: The agency plans to expand certain services through sliding-scale or fee-for-service models where appropriate, providing additional revenue while maintaining accessibility.
3. Community and Donor Engagement: We will cultivate relationships with individual donors, local businesses, and community organizations through targeted outreach, fundraising events, and advocacy campaigns to secure ongoing financial support.
4. Demonstrating Impact: By tracking and reporting measurable outcomes of our programs, we will demonstrate effectiveness and return on investment to city officials and other potential funders, strengthening future funding requests.
5. City Funding Advocacy: We plan to maintain ongoing communication with city leaders and stakeholders, showcasing program successes and community impact. This includes participation in advisory boards, public meetings, and direct engagement to influence policy and future budget considerations.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Increase daily functioning	Participants showing improvement	75%
Increase community participation	Participants completing activities	80%
Build job skills	Module completion rate	70%
Provide caregiver education	Family sessions held	6-8 sessions
Ensure satisfaction	Positive survey responses	90%

Overall Agency Budget

Expenditures FY 2024- FY 2026						Percent city request of overall budget
FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST		
Personnel						
Salaries	N/A	N/A	\$137,720	\$183,080	\$10,000	5%
Merit	N/A	N/A	\$0	\$0	\$0	0%
Benefits	N/A	N/A	\$0	\$0	\$0	0%
Subtotal Personnel Expenses	\$0	\$0	\$137,720	\$183,080	\$10,000	5%
Operating						
Capital Equipment (e.g. vehicles, computers)	N/A	N/A	\$1,000	\$1,000	\$0	0%
Communications (e.g. publishing, marketing)	N/A	N/A	\$1,000	\$1,000	\$0	0%
Facilities (e.g. rent, utilities)	N/A	N/A	\$0	\$21,600	\$0	0%
Program Supplies	N/A	N/A	\$10,000	\$10,000	\$5,000	50%
Travel & Training	N/A	N/A	\$1,000	\$1,000	\$0	0%
Technology	N/A	N/A	\$1,200	\$500	\$0	0%
Other: Insurance	N/A	N/A	\$540	\$540	\$0	0%
Subtotal Operating Expenses	\$0	\$0	\$14,740	\$35,640	\$5,000	14%
Total Expenditures	\$0	\$0	\$152,460	\$218,720	\$15,000	7%
Net Revenues	\$0	\$0	-\$152,460	-\$218,720		

Revenues				
Category	Year 1	Year 2	Year 3	FY2027 Projected Budget
Grant Funding	\$0	\$0	\$0	
Private Pay Billing Revenue	\$115,200	\$230,400	\$345,000	
Donations & Fundraising	\$10,000	\$10,000	\$20,000	
Total Revenue	\$115,200	\$230,400	\$345,000	
Donor Contributions				

Revenues				
Category	Year 1	Year 2	Year 3	FY2027 Projected Budget
Service Fees				
Other Revenue				
Total Revenues	\$240,400	\$470,800	\$710,000	\$0

Current Board of Directors

Shena Silver
Elane Ore Thomasena

Vaughn Larkins
Brandon Cobb

Tyrone Johnson

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FY 2027 Financial Partner Agency Summary

Dress for Success

Agency Description

Since 2000, Dress for Success Charlotte (DFSC) has empowered women to achieve economic independence by providing a network of support, professional attire, and development tools to thrive in work and in life. An independently-operated network member of the national organization, DFSC works with 80 local referral agency partners to reach over 700 women each year, helping them secure stable, living-wage employment.

DFSC offers a full spectrum of workforce development programs at no cost to participants. Along with services like interview and employment styling, 1:1 career coaching, financial education, entrepreneurship, upskilling/reskilling and certification pathways, DFSC programs include:

- Going Places Network, which teaches professional skills, job search strategies, confidence building, and social capital to enhance career prospects for unemployed and underemployed women in a 6-week program.
- Professional Women's Group, which supports employed women with ongoing education and development in workplace communication, corporate culture, financial literacy, health, wellness, networking, and work-family sustainability.
- Job Training Programs provide skill-based training and pathways to jobs for high-demand industries like fiber optics installation, customer service, and forklift driving, among others.

Serving 13,000 women across Charlotte to date, DFSC has a successful history of supporting women in their search for stable, living-wage jobs:

- 68% of women utilizing one or more services secure employment within 12 months of program completion
- 75% of women participating in the Going Places Network secure employment within 12 months of program completion
- 90% of women participating in the Professional Women's Group retain their job for 1 year after program completion

The more programs and services leveraged by a client, the shorter the average time-to-hire

When a woman emerges from poverty, she brings as many as six people along with her, transforming not just her own life, but those of her family and community (Women's Impact Study, 2015). DFSC is committed to preparing and connecting our clients to living-wage jobs, grounding the economic stability of Charlotte's women and their communities.

Current Financial Partner?

No

Agency Established

1999

FY 2027 Funding Request

\$298,027

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$1,386,500	\$298,027	21%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 87 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	18	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	13	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	17	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	12	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>

Category	Max Points	Score	Excellent	Good	Fair	Poor
Organizational Capacity & Governance	15	13	13-15 <i>Strong leadership & policies</i>	10-12 <i>Adequate; minor gaps</i>	6-9 <i>Capacity concerns</i>	0-5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9-10 <i>Clear need; underserved focus</i>	6-8 <i>Need defined; limited data</i>	3-5 <i>Broad; limited justification</i>	0-2 <i>Unclear/not compelling</i>
Sustainability Plan	5	4	5 <i>Diversified; strong sustainability</i>	3-4 <i>Partial diversification</i>	1-2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

DFSC programs and services are available to our clients as often as they wish to engage. Of the 677 unique women served last year ages 16-70, 223 women engaged in two or more services.

100% of clients identify as low or no-income, 66% as single parents or guardians, and 69% as women of color. 8% of women served are Veterans, and 18% are justice-involved.

Our overall served community comprises the following demographics:

Ethnicity:

African American: 53%; Caucasian: 19%; Hispanic/Latino: 9%; Asian: 0%; Multi/Mixed: 2%; Other: 5%; Unknown: 12%

Age:

51 & Older: 14%; 41-50: 16%; 31-40: 25%; 25-30: 14%; 18-24: 10%;

Describe the activities that will be supported through requested city funding

Dress for Success Charlotte (DFSC) aligns with the City’s Strategic Priority of Workforce and Business Development by empowering women with career support that enhances employability, promoting equitable economic opportunity and digital inclusion for our clients and community, and strengthening a local workforce that fuels business growth and community prosperity.

Living-wage employment is central to women’s economic independence: If 18+ year old women in NC were paid comparably to men, poverty among women would drop by 40%, and for single mothers, the rates would drop by half (IWPR, 2020). DFSC is actively dismantling barriers to women’s living-wage employment that go beyond attire and interview skills. Our holistic approach acknowledges the structural challenges facing women, particularly women of color and single heads-of-household. We offer responsive, wraparound services that meet each woman where she is on her employment journey.

Our proposed initiative, Workforce Beyond Barriers, would create, support, and sustain clear job-skilling pathways and hiring partnerships that provide underserved women with stable, living-wage jobs that support the needs of herself and her family. This initiative would build a DFSC team focused on employment pathways, including cultivating hiring pipelines, expanding job training partnerships, and supporting nontraditional careers. Integrating job-readiness and skill-based

training with health and financial wellness programs would support women's long-term access to living-wage roles. Workforce Beyond Barriers would also strengthen employers' understanding of the economic needs of women in our community and develop mutually-beneficial hiring commitments. DFSC would work with targeted referral partners in our network, including: Freedom Communities, YWCA Women in Transition, Dove's Nest, Center for Community Transitions, Camino, Goodwill, and Central Piedmont Community College.

Workforce Beyond Barriers is a two-year phased initiative, projected to serve a total of 500 women in Charlotte.

The Financial Partner Program's support would be critical in setting a strong foundation at the outset of the project in Year 1:

- Year 1: Hire Director to begin building employment partnerships, Project Manager to begin working with clients, 0.5FTC communications role to support client/employer content. Creates emergency relief fund (\$500/month) for use in reducing barriers that lead to women's job opportunities.
Estimated 100 women served
- Year 2: Maintains staff through the year, increases discretionary funds to reflect expanded clients served, as well as increased funding for upskilling, reskilling, and certification costs for clients.
Estimated 400 women served

Requested funding would directly support:

The addition of 2.5 FTE roles specifically focused on building talent pipelines with regional employers, deepening partnerships, and creating alternate pathways to nontraditional careers such as healthcare and skilled trades

Working with industry-specific trainers to offer WFD cohorts while integrating job-readiness training with health and financial wellness programming, two critical factors that directly impact employability and long-term success

Strengthening employer engagement to ensure that skill-building leads to actual hiring commitments, addressing the disconnect between training and employment outcomes

Implementing job skills and career path assessments with referral partners to capture client outcomes and the challenges they face along the referral-to-hire process

Ultimately, awarded funding would amplify the effect of DFSC's direct services in Charlotte, which support immediate client needs such as assistance with cohort-based workforce readiness programs specific to employment opportunities; job fairs and mock interviews; social capital events that teach necessary networking skills; transportation to attend programming; and financial education and health partnership events to address clients' needs. With 66% of our clients identifying as single parents or guardians, and 69% as women of color, DFSC is uniquely positioned to accelerate economic mobility for Charlotte's most significantly impacted communities.

In 2025 alone, DFSC has seen a 50% increase in demand for all programs and services, signaling that our already vulnerable community is experiencing growing distress. Workforce Beyond Barriers will allow for expanded staff and program support, working to offset the exacerbated stressors that women in Charlotte are experiencing.

Strategies agency plans to implement to sustain the agency or program(s) in future years

With 25 years of experience working with our community, DFSC has secured funding from supporters including Bissell Ballantyne Legacy Foundation, Ally, Accenture, the Leon Levine Foundation, the Truliant Foundation, and the Merancas Foundation, among others. DFSC is committed to stewarding current funding partnerships and actively pursuing new opportunities to sustain our programs and grow our impact.

The organization has recently launched a strategic plan that provides the framework for diversifying and building sustainable revenue to support long-term organizational growth. We will use data to track outcomes, continuously improve services, and demonstrate our impact to future funders. DFSC has launched a capital campaign within a lease-to-purchase agreement on a new facility and will build sustaining relationships with capital funders to support long-term operations. With 100% board participation in operating and capital campaign funding, DFSC has expanded the board to establish governance and finance committees.

While the Workforce Beyond Barriers program will be an expansion of services for DFSC, it builds on the history of program and client success. Funding from the City of Charlotte will be used as proof of concept for employment partners and funders, allowing DFSC to build on its history of success, while scaling an impactful model that changes the economic trajectory of women in our community.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Equip clients with the skills to thrive in the digital economy, setting them up for long-term financial security	Number and percentage of clients completing digital-skills training or demonstrating proficiency in key digital competencies	75% of job-seeking clients will show measurable improvement in digital literacy and job-search readiness.
Equip clients with the skills to thrive in the digital economy, setting them up for long-term financial security	Number of clients placed in technology-related internships or jobs	70% of job-seeking clients secure employment within 12 months of program completion
Increase the number of women securing sustainable-wage employment	Percentage of clients who secure employment at a higher wage than when they sought services within 12 months of participation.	Achieve a 70% rate of economic growth roles for WBB clients
Increase the number of women securing sustainable-wage employment	Number of clients completing skill-based training or certification programs (e.g., fiber optics, customer service, forklift, healthcare pathways)	At least 100 clients complete skill-based training or certification programs

Objective	Measure	FY2027 Target
Strengthen employer partnerships that create pipelines to living-wage, high-demand careers	Number of employers/partners engaged in training, hiring commitments, or career pathway development.	Develop and sustain at least 20 active employer / training pathways supporting living-wage careers

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2026 CITY REQUEST	
Personnel						
Salaries: Year 1: Dir. Workforce Employment (1FTE) - 10 mo, PM Workforce Employment (1FTE) - 8 mo, Comms Coordinator (.5FTE) - 12 mo. Year 2: All positions 12 mo.	\$0	\$0	\$0	\$167,500	\$167,500	100%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$0	\$0	\$0	\$45,777	\$45,777	100%
Subtotal Personnel Expenses	\$0	\$0	\$0	\$213,277	\$213,277	100%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$6,000	\$6,000	100%
Communications (e.g. publishing, marketing)	\$0	\$0	\$0	\$0	\$0	0%
Facilities (e.g. rent, utilities)	\$0	\$0	\$0	\$23,250	\$23,250	100%
Office Supplies	\$0	\$0	\$0	\$1,000	\$1,000	100%
Travel & Training	\$0	\$0	\$0	\$1,500	\$1,500	100%
Technology	\$0	\$0	\$0	\$1,000	\$1,000	100%
Other: Professional services, Salesforce Data Integration - building custom objects to expand data/tracking	\$0	\$0	\$0	\$30,000	\$30,000	100%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2026 CITY REQUEST		
Other: Program Emergency Relief Fund - Discretionary funding to ease barriers through employment search (bus passes, childcare needs, food)	\$0	\$0	\$0	\$12,000	\$12,000	100%
Other: Program delivery, job training, certification testing, & related materials (assumed weekly engagement; \$100/client total for program)	\$0	\$0	\$0	\$10,000	\$10,000	100%
Subtotal Operating Expenses	\$0	\$0	\$0	\$84,750	\$84,750	100%
Total Expenditures	\$0	\$0	\$0	\$298,027	\$298,027	100%
Net Revenues	\$0	\$0	\$0	-\$298,027		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2026 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner or otherwise)	\$0	\$0	\$0	\$0
Mecklenburg County Funding	\$0	\$0	\$0	\$298,027
Foundation Grants & Funding	\$0	\$0	\$0	\$0
Donor Contributions	\$0	\$0	\$0	\$0
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0
Total Revenues	\$0	\$0	\$0	\$298,027

Current Board of Directors

Jessica Graham
Dena Diorio
Jessia Baniias
Samantha Melting
Clint Watson

Jenn Andrew
Wendy Boddy
Arlena Hawthorne
Stephanie Richard

Sharai Lavoie
Tanita Alexander
Matthew McArdle
Claudia Vazaquez-Bernal

FY 2027 Financial Partner Agency Summary

Freedom Communities

Agency Description

Freedom Communities' mission is to partner with neighbors in the Freedom/Wilkinson Corridor to create opportunities in education, housing, employment, and wellness that lead to holistic transformation for a thriving community.

Freedom Communities was founded in 2017 by business leaders in response to the Chetty study which ranked Charlotte 50th out of 50 large US cities for upward mobility. Our founders conducted national research on models demonstrating positive outcomes in disrupting the cycle of generational poverty and learned about the interconnections between a person's housing, education, health, and employment. In response, they formed Freedom Communities (FC), a place-based nonprofit that intentionally limits the geographic radius of its investments to go deep and work holistically with families, knitting together an ecosystem of partners while simultaneously investing in infrastructure like affordable housing, childcare, and a hub for small business growth.

With a tagline of family-centered community transformation, we invest simultaneously in families and infrastructure. Our core focus areas are affordable housing, small business growth, early education, and family stability; our work and impact in each area are outlined below.

FC builds and preserves affordable housing: To address our city's affordable housing crisis, we've developed cross sector partnerships to build and preserve affordable housing. Our partnerships with Crosland Southeast, True Homes, and Habitat for Humanity have yielded over 700 affordable rental, for sale, and transitional housing units. We are currently preparing to build up to 12 additional affordable rental units within the Freedom/Wilkinson Corridor, which will offer our program participants access to stable, low-barrier housing while they work toward economic mobility and financial resilience.

FC fosters small business success: Launched in 2024 with support from the City of Charlotte, the Freedom Business Collective (FBC) provides affordable office and co-working space, group education, monthly networking events, and individual mentoring for entrepreneurs who live, work, and/or serve the community within the 28208 zip code. To date, the Freedom Business Collective has become fully operational and has supported over 80 local entrepreneurs in building their businesses through dedicated training, mentorship, and networking opportunities.

FC expands access to quality early education: To address our area's childcare deficit, FC expanded the capacity of Bright Future Learning Center, a childcare center run by a local community leader known to produce the best readers at local schools. Opened in 2022, this center, which is located on our office site, has capacity for 70 infants and toddlers. As part of our current capital campaign, we plan to further expand the center beginning in 2026.

FC promotes family stability: Our signature two-generation program, Moms Moving Forward (MMF), builds family strength and economic mobility for mothers and children in the 28208 zip code. To date, MMF has served over 600 women and children, equipping them with tools to make progress in areas such as employment, housing stability, personal finance, parenting, and physical and

emotional health. Our alumni community meets monthly to sustain progress. We are also in the process of piloting a program for dads in our community, which will welcome the inaugural cohort of fathers in 2026.

Current Financial Partner?

No

Agency Established

2017

FY 2027 Funding Request

\$80,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$4,943,486	\$80,000	2%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 88 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	12	13–15	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>

Category	Max Points	Score	Excellent	Good	Fair	Poor
			<i>Well-defined; outcome-connected</i>			
Impact & Performance Measures	20	17	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	13	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	14	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	9	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	4	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

In 2026, we anticipate that our programs and partnerships will serve over 3,500 individuals. The majority of these are low-to-moderate income individuals and families residing within Charlotte’s Freedom/Wilkinson Corridor. Our total number of individuals served reflects moms and children enrolled in the Moms Moving Forward (MMF) program, active MMF alumni, entrepreneurs served at the Freedom Business Collective (FBC), individuals housed through our affordable housing initiatives, and individuals impacted by our investment in other community infrastructure such as early childhood education (e.g. children enrolled at Bright Future Early Learning Center on-site at our office location, the Tuck Hub).

Describe the activities that will be supported through requested city funding

City of Charlotte Financial Partners funding would be directed toward Freedom Communities’ small business incubator, the Freedom Business Collective (FBC).

The Freedom Business Collective (FBC) was born from FC’s belief in entrepreneurship as a viable pathway to economic mobility. Our team’s experiences working with residents here revealed two primary barriers to the development of small businesses: high costs of commercial office space, and a need for affordable business management education.

Founded in August 2024, the FBC addresses these gaps by providing low-cost office and co-working space, group education, networking, and individual coaching for entrepreneurs on Charlotte’s West Side. The majority are part of groups historically underrepresented in the entrepreneurial landscape, with 90% of members identifying as Black and 85% as women. Most

face significant barriers such as lack of access to capital or difficulty obtaining business-related education. Most members are early-stage entrepreneurs, with hopes of moving their business beyond the startup stage toward growth and long-term sustainability.

Since opening, the FBC has reached capacity in its office spaces and currently supports 25 member entrepreneurs. Our monthly Thrive Thursday networking events, open to the larger community, are aimed at building social capital and have served over 80 local businesses to date. One of the FBC's greatest strengths is the vibrant, collaborative community that has formed among our members. In six-month progress surveys, over 95% of participants rate FBC as "good" or "great" in professional atmosphere, educational support, and opportunities for collaboration. What began as a group of individual entrepreneurs has evolved into a network of peers who actively share knowledge, customers, and services to help one another grow.

Our most significant strength, however, lies in the members themselves. Member Ada Esther Gil Jimenez, owner of AEGJ Construction, serves as a prime example: After immigrating from the Dominican Republic, Jimenez built a career in IT until the pandemic shifted her path. Returning to her family's construction roots, she launched AEGJ and found support through the FBC for affordable workspace and resources. Today, her business thrives, carrying forward a legacy of resilience and determination. Says Jimenez: "I am so thankful for the opportunity to be a member of the Freedom Business Collective. Having an office space at an affordable cost has been such a blessing."

The FBC's one-year anniversary event in September highlighted the inspiring journey of our members since our opening (including Cornelia Hagens, member and owner of Chelle Belle Creatives, who was highlighted in a video by the City of Charlotte following the event), as well as the growth that is yet to come. Over the next two years, we aim to boost our capacity to support local entrepreneurs by solidifying and standardizing our program model, increasing support services to entrepreneurs, and refining educational offerings to better meet the needs of the businesses we serve. With support from the City of Charlotte, we will build a clear, three-phase program structure to help move members from the ideation stage to long-term success, enhance data systems to track member progress, and expand access to individualized mentoring and targeted business education.

Strategies agency plans to implement to sustain the agency or program(s) in future years

FC receives a healthy balance of funding from faith congregations, corporations, individuals, and foundations. We plan to strengthen these existing relationships, and have recently expanded our team, adding a Manager of Strategic Partnerships, to sustain existing and build new funding partnerships to expand our programming. Additionally, our unique partnership with real estate developer Crosland Southeast allows us part ownership in hundreds of new units of affordable housing. Over time, we will see over \$350,000 in cash annually from these projects which will help to sustain some of our operating budget while creating hundreds of new affordable rentals.

The Freedom Business Collective also generates rent income from its members. Over the next two years, we aim to refine our pricing strategy in order to increase year-to-year member retention by at least 20%, thus increasing the amount of rent income we are able to collect and minimizing vacancy.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Increased business revenue of FBC member entrepreneurs	Gross monthly business income, as self-reported on member surveys taken at 6-month intervals throughout membership	At least 25% average increase in gross monthly business income among members over the course of one year
Increase in availability/retention of local jobs through employment with small business members	Number of local employees utilized by member businesses, as self-reported on surveys	At least 20 local jobs created and/or retained through employment with member businesses over the course of one year
Increased access to industry-specific entrepreneurial education and networking opportunities for West Side entrepreneurs	Number of educational workshops and Thrive Thursday networking events held over the course of one year; number of businesses served overall	A minimum of ten educational workshops and ten Thrive Thursday networking events held over the course of one year; at least 100 entrepreneurs served annually
Improvement in quality of available services, support, and collaboration opportunities for entrepreneurs on the West Side	Ratings of the FBC in areas such as professional support, collaboration with other members, and access to resources, as provided by members on 6-month interval surveys	At least 90% of members rate their experience as "good" or "great" in professional support, collaboration, and access to resources through the FBC

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$43,882	\$48,514	\$73,333	\$75,533	\$40,000	53%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$1,755	\$1,941	\$2,099	\$2,162	\$0	0%
Subtotal Personnel Expenses	\$45,637	\$50,455	\$75,432	\$77,695	\$40,000	51%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)	\$2,115	\$843	\$997	\$1,027	\$0	0%
Facilities (e.g. rent, utilities)	\$705	\$88,246	\$108,831	\$112,096	\$20,000	18%
Office Supplies	\$57	\$5,242	\$3,113	\$3,207	\$0	0%
Travel & Training	\$0	\$106	\$0	\$0	\$0	0%
Technology	\$0	\$5,579	\$1,638	\$1,687	\$0	0%
Other: Insurance	\$0	\$1,851	\$3,683	\$3,794	\$0	0%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Other: Bank & admin/misc. fees	\$0	\$3,293	\$1,368	\$1,409	\$0	0%
Other: Thrive Thursday networking events	\$208	\$5,644	\$17,472	\$17,996	\$0	0%
Other: FBC member rent scholarships	\$0	\$58,280	\$56,398	\$58,090	\$20,000	34%
Other: FBC member workshop series/group coaching	\$0	\$8,497	\$10,060	\$10,362	\$0	0%
Other: Small Business Grants	\$0	\$0	\$3,000	\$5,000	\$0	0%
Other: Leasehold improvements (renovations/upgrades to building)	\$0	\$388,657	\$0	\$0	\$0	0%
Subtotal Operating Expenses	\$3,086	\$566,239	\$206,561	\$214,668	\$40,000	19%
Total Expenditures	\$48,723	\$616,694	\$281,993	\$292,362	\$80,000	27%
Net Revenues	\$392,896	-\$349,350	-\$43,483	-\$603		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner or otherwise)	\$395,245	\$122,556	\$81,704	\$80,000
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding	\$0	\$0	\$25,000	\$75,000
Donor Contributions	\$45,637	\$51,455	\$28,488	\$30,342
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$737	\$93,333	\$103,318	\$106,417
Total Revenues	\$441,619	\$267,344	\$238,510	\$291,759

Current Board of Directors

Tim Sittema
Evelyn Minter
Shawn Kennedy

Elizabeth Cooper
Dr. David Docusen
Michelle Hewlett Wynn

Mark Linsz
Claire Magge Ferguson
Dough Irmischer

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FY 2027 Financial Partner Agency Summary

National Black MBA of Charlotte

Agency Description

Workforce and Business Development: Building and maintaining a successful business climate and workforce talent, including the number of jobs with sustainable wages/benefits; economic opportunity and digital/automation and Artificial Intelligence development for all members and students; and encouraging business development, innovation, and entrepreneurship.

Current Financial Partner?

No

Agency Established

1994

FY 2027 Funding Request

\$45,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$169,300	\$45,000	27%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Financial Statements	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
N/A	✓	✓	✓	◇	◇	✓	✗	✗

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 100 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	20	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	15	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	20	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	15	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	15	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

The Community of Charlotte and the Role of NMBAA

Charlotte, North Carolina, is one of the fastest-growing cities in the United States, with a diverse population and a thriving economy. However, despite its progress, certain communities, particularly underrepresented groups, continue to face significant barriers to economic opportunities and professional advancement. The National Black MBA Association (NMBAA) of Charlotte plays a crucial role in addressing these disparities by fostering economic empowerment, professional development, and innovation, specifically within the African American community.

Demographics and Needs of Underrepresented Communities

Charlotte’s population is approximately 900,000, with a metropolitan area reaching over 2.9 million people. The African American population in Charlotte makes up about 30% of the city’s total population. Despite this sizable demographic presence, African Americans and other underrepresented groups continue to face challenges in achieving equitable access to business opportunities, education, and career advancement. Key needs in these communities include:

1. Workforce Development and Career Advancement:

- African Americans in Charlotte, while a significant portion of the population, have historically faced challenges related to access to well-paying jobs, especially in leadership roles. The unemployment rate for African Americans in Charlotte is often higher than the citywide average, and many workers in underrepresented communities are underemployed or face wage stagnation.

2. Access to Business Opportunities and Entrepreneurship:

- Minority-owned businesses in Charlotte face barriers to growth, including limited access to capital, fewer networking opportunities, and challenges in securing corporate contracts. This has limited the ability of African American entrepreneurs to scale their businesses and fully contribute to the city’s economic expansion.

3. Digital Divide and Technological Inclusion:

- A growing digital divide persists in many of Charlotte’s underserved communities, where access to high-speed internet and digital training remains limited. This gap prevents many individuals from participating in the digital economy and from accessing the skills needed to compete in modern industries.

Describe the activities that will be supported through requested city funding

Requested funding from the City of Charlotte will support integrated workforce development and health equity initiatives led by the National Black MBA Association Charlotte Chapter (NBMBA Charlotte). These activities are designed to advance economic mobility, strengthen workforce participation, and reduce systemic barriers impacting African American professionals and underserved communities across Charlotte.

Workforce Development for High-Growth, Living-Wage Careers

City funding will enable NBMBA Charlotte to design and deliver technology-focused programming and resource preparedness aligned to Charlotte’s projected growth in data centers, engineering, analytics, and technology-enabled operations over the next five years. Programming will focus on artificial intelligence, data analytics, and applied digital skills that directly support workforce readiness and career mobility.

Supported activities include:

- Applied learning workshops and professional learning series introducing AI concepts, data analytics fundamentals, and real-world enterprise use cases
- Career readiness programming focused on skill translation, resume alignment, interviewing, and employer expectations for technology-driven roles
- Employer- and industry-informed content developed in collaboration with corporate partners to ensure alignment with current and emerging workforce needs

These activities expand access to high-growth, living-wage career pathways while strengthening Charlotte’s talent pipeline in sectors critical to the city’s economic future.

Health Equity as a Workforce Enabler

Recognizing that workforce participation and economic mobility are deeply connected to health and well-being, City funding will also support health awareness, mental health education, and caregiver readiness programming. In partnership with Atrium Health and Novant Health, NMBBAA Charlotte will deliver community-centered initiatives that address health-related barriers to employment and career advancement.

Supported activities include:

- Mental health and wellness education focused on stress management, resilience, and access to care
- Caregiver strategic planning sessions that equip individuals with tools to balance employment responsibilities while supporting family health needs
- Preventive health awareness forums addressing chronic disease and healthcare navigation within African American communities
- These efforts strengthen workforce stability, reduce absenteeism, and support sustained participation in career advancement opportunities

Community-Centered Delivery and Inclusive Access

City funding will also support outreach, coordination, and evaluation to ensure equitable access and measurable impact. Programming will prioritize African American professionals, caregivers, and emerging leaders who face compounded workforce and health challenges. NMBBAA Charlotte will leverage its trusted community presence and corporate relationships to maximize participation and outcomes.

Organizational Capacity and Proven Impact

For more than 30 years, NMBBAA Charlotte has catalyzed professional advancement, innovation, and inclusive economic development. The chapter has demonstrated success through:

- Longstanding corporate collaborations with employers such as Trane Technologies, Truist Bank, Bank of America, Duke Energy, and Wells Fargo
- Entrepreneurship and innovation initiatives supporting African American-owned business growth and job creation
- Digital inclusion programs that bridge skill gaps and connect residents to high-demand technology careers
- Advocacy and convening efforts that influence workforce practices, economic policy, and equity-focused investment

Public Benefit and Citywide Impact

City investment in these activities will generate clear public benefit by:

- Expanding access to high-growth, living-wage career pathways aligned to Charlotte's evolving labor market
- Strengthening workforce participation through health-aware programming that addresses mental health and caregiver readiness

- Reducing systemic barriers to economic mobility through integrated workforce and health support
- Advancing Charlotte’s commitment to inclusive growth, resilience, and equity by cultivating a skilled, healthy, and diverse workforce prepared to contribute to the city’s long-term economic vitality

Strategies agency plans to implement to sustain the agency or program(s) in future years

The National Black MBA Association, Charlotte Chapter (NBMBA Charlotte) is committed to advancing economic mobility, workforce readiness, and inclusive growth for African American professionals and underserved communities across the Charlotte region. With a proposed \$45,000 investment for the 2026-2027 program year, NBMBA Charlotte will implement a focused set of integrated initiatives that expand access to high-growth, living-wage career pathways while addressing health-related barriers to workforce participation.

NBMBA of Charlotte will continue partnering with Corporate Sponsors, fundraising activities, and alliances to fund programming and financial growth activities.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Annual Workforce Development Summit	Number of attendees (businesses, community members, job seekers, tech leaders)	At least 250 attendees, including 50 businesses
Annual Workforce Development Summit	Number of partnerships formed between businesses and underrepresented talent	5 new partnerships with local businesses for internships, mentorships, or recruitment
AI and Digital Skills Training Programs	Number of individuals trained in AI and digital skills (e.g., AI, machine learning, data analytics)	At least 100 individuals trained in AI-related skills
AI and Digital Skills Training Programs	Number of certifications or completions from participants	75% completion rate for participants
Corporate Job Expansion Collaboration	Number of job fairs held	At least 4 job fairs and corporate roundtables

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$11,000	\$22,500	\$30,000	\$32,000	\$16,000	50%
Merit	\$500	\$250	\$750	\$1,000	\$0	0%
Benefits	\$0	\$0	\$0	\$0	\$0	0%
Subtotal Personnel Expenses	\$11,500	\$22,750	\$30,750	\$33,000	\$16,000	48%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	0%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Communications (e.g. publishing, marketing)	\$6,135	\$7,881	\$10,000	\$11,000	\$5,500	50%
Facilities (e.g. rent, utilities)	\$1,045	\$1,236	\$1,500	\$1,650	\$0	0%
Office Supplies	\$0	\$0	\$0	\$0	\$0	0%
Travel & Training	\$6,348	\$12,776	\$15,000	\$16,500	\$0	0%
Technology	\$1,250	\$15,206	\$15,000	\$15,000	\$15,000	100%
Other: Insurance	\$2,000	\$2,300	\$2,500	\$2,650	\$0	0%
Other: Community Relation Programming	\$1,111	\$3,566	\$4,000	\$5,000	\$5,000	100%
Other: Corporate Partnership Leadership Programming	\$3,200	\$3,551	\$3,500	\$4,500	\$0	0%
Other: Entrepreneurship Training	\$19,866	\$32,340	\$40,000	\$42,500	\$42,500	100%
Other: Wealth Education and Training		\$2,960	\$5,000	\$7,500	\$7,500	100%
Other: Membership Drive	\$9,799	\$23,183	\$25,000	\$30,000	\$30,000	100%
Subtotal Operating Expenses	\$50,754	\$104,999	\$121,500	\$136,300	\$105,500	77%
Total Expenditures	\$62,254	\$127,749	\$152,250	\$169,300	\$121,500	72%
Net Revenues	\$6,446	-\$36,216	-\$84,250	-\$116,300		

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner and otherwise)	\$0	\$0	\$0	\$0
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding	\$0	\$0	\$0	\$0
Donor Contributions	\$39,600	\$64,533	\$45,000	\$35,000
Service Fees	\$0	\$0	\$0	\$0

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Other Revenue	\$29,100	\$27,000	\$23,000	\$18,000
Total Revenues	\$68,700	\$91,533	\$68,000	\$53,000

Current Board of Directors

JaCynthia Little
 Karin Flanagan
 Mikayla Edwards

Ty White
 Tomia Lindsey

Crystal Wright
 Andrew Tucker

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FY 2027 Financial Partner Agency Summary

National Institute of Minority Economic Development - Women's Business Center of Charlotte

Agency Description

Established 39 years ago, the National Institute of Minority Economic Development (the Institute) is a uniquely positioned nonprofit organization dedicated to creating economic prosperity for small businesses. For nearly four decades, the Institute has supported small businesses in achieving meaningful economic impact by strengthening the entrepreneurial ecosystem and expanding access to capital.

Our organization operates three separate divisions, which work collaboratively:

1. Our Center for Entrepreneurship provides meaningful education, training, growth strategies and technical assistance for small businesses. We help stabilize families through expanded economic opportunity and improved business value.

Services include technical assistance to aspiring and existing small business owners; workshops, seminars, cohorts, conferences and summits, and other capacity-building growth strategies.

2. Our CDFI, Institute Capital, provides access to capital for small businesses and non-profit affordable housing developers, improving the financing environment to support accessible lending products.

3. Our Center for Strategic Partnerships (CSP), a consulting arm of the Institute, leads the Institute's strategic partnerships and fee for service contracts with universities, municipalities, and corporate entities. The Women's Business Center of Charlotte (WBCC) has collaborated with CSP to identify small business owners capable of participating as suppliers and contractors for these corporate and government partners.

The Women's Business Center of Charlotte (WBCC) opened on May 1, 2016, as a program of the Center for Entrepreneurship. WBCC serves small business owners across the 12-county Charlotte region. Over the past eight years, our programs have supported more than 6,500 unique entrepreneurs in starting and growing their businesses.

Our clients span a wide range of industries, including retail, construction, finance, and home health. We provide comprehensive technical assistance (TA) services that address technology adoption, financial health, leadership development, peer networking, and business growth strategies.

The WBCC team includes Executive Director Rocio Gonzalez, Program Director Sheila Obregon, and a Program Manager. Two team members are fluently bilingual, enabling us to deliver services concurrently in both Spanish and English.

Annually, WBCC serves approximately 1,000 entrepreneurs, delivering 74 events and providing more than 3,000 hours of technical assistance and training.

Guided by client feedback and real-time economic insights, we continuously adapt our service delivery and integrate new technologies to ensure our programs are responsive, forward-looking, and generate meaningful economic impact and outcomes.

Current Financial Partner?

Yes

Agency Established

1986

FY 2027 Funding Request

\$50,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$3,939,311	\$50,000	1%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

6 years

Funding History

FY2024	FY2025	FY2026
\$50,000	\$50,000	\$50,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	◇	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 89 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	18	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	13	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	18	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	13	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	14	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	9	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	4	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Our target audience comprises of men and 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 U.S. Small Business Administration (SBA), the WBCC services individuals who are aspiring entrepreneurs or existing small business owners in Alexander, Anson, Cabarrus, Catawba, Cleveland, Gaston, Iredell, Mecklenburg, Rowan, Stanly, and Union Counties.

In 2025 we served 1,332 individuals with business counseling services and attended programs, training sessions and events hosted by the WBCC.

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 our clients represent socially and economically disadvantaged populations. Many of our clients are located within Charlotte's "Corridors of Opportunity" zone.

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 meet any business need and for our clients to grow with us, regardless of size or business stage. In addition to technical assistance and core business development/education needs, our clients also share with us their desire to improve 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 are 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 technical assistance partner for Mexican entrepreneurs and any Latino member as they expand their services to all Latin American countries.

Across the Charlotte area, the WBCC partners with other Institute programs such as our affiliated CDFI, Institute Capital, the Institute Community Development Initiative (a CDC), and our Center for Strategic Partnerships, as well as collaborating with the Charlotte Business Inclusion program to offer an array of topics and the opportunity for clients to increase their networks. We have been instrumental in educating and supporting small businesses as they pursue certification with CBI, as well as vendor opportunities with Mecklenburg County. We are also open to other partnerships opportunities.

Within the past year, the Institute purchased a commercial office building which now houses the WBCC, Institute Capital and our Center for Strategic Partnerships. This new home allows us to host in-person events and offer affordable co-working and individual office spaces for local entrepreneurs.

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 (0-1 year 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 technical assistance, or other assistance in pursuing small business certification programs.

Our capacity-building programs are offered in cohort-based learning models targeted at 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 AI and technology innovations to marketing strategies, financial literacy, business and operational management, leadership and communication development, all provided by internally certified staff or external subject matter experts. In addition, any client can request 1:1 business counseling with our staff members who are certified business advisers under the GrowthWheel program, to further assist in their business development or business growth.

One objective of the WBCC program is to bring additional value to the City's transportation Strategic Priority. With an eye towards expanding infrastructure, access to safe transportation, and improving environments for low-income neighborhoods, WBCC can develop networking and educational opportunities for small businesses to prepare for opportunities available as the City of Charlotte develops upcoming transportation projects.

Strategies agency plans to implement to sustain the agency or program(s) in future years

The Women's Business Center of Charlotte (WBCC) is funded in part by the U.S. Small Business Administration (SBA), which provides annual operating support and long-term program stability. WBCC also operates within the National Institute of Minority Economic Development's Center for Entrepreneurship, allowing the program to benefit from the Institute's administrative and operational infrastructure. Through this relationship, WBCC can leverage larger grants, corporate sponsorships, and federal and state funding opportunities when appropriate.

To further strengthen and diversify its funding base, WBCC continually vets and cultivates local and regional sponsors and partners. We collaborate with long-standing partners such as the City of Charlotte, Mecklenburg County, Latin American Chamber of Commerce, Charlotte Business Alliance, Prospera, the NC Veteran Business Association, and the Carolinas Virginia Minority Supplier Development Council, among others. WBCC also maintains strong connections with the state's Small Business Development Center (SBDC) network, the SBA's Charlotte District Office, the NC Department of Commerce, the NC Department of Revenue, the Secretary of State, and community development financial institutions (CDFIs) including Self-Help and the Carolina Small Business Development Fund (CSBDF). These ongoing collaborations enable WBCC to leverage core competencies across the ecosystem while minimizing duplication of services.

WBCC has also established meaningful relationships with financial institutions, foundations, and corporate partners including Wells Fargo, Fifth Third Bank, U.S. Bank, Bank OZK, LISC Charlotte, Inspire Equity Foundation, First National Bank, Foundation For The Carolinas, Pinnacle Financial Partners, and the NC Department of Transportation. Over the past five years, these partnerships have resulted in direct financial support that has strengthened WBCC's capacity and expanded access to capital and business development resources for its clients. Supporting local small businesses strengthens the regional economy, as these businesses are more accountable to their

communities, hire local employees, reinvest locally, and support nonprofit and small business ecosystems.

To ensure long-term sustainability beyond City funding, WBCC remains committed to building and maintaining partnerships with organizations that recognize the critical role small businesses play in job creation and economic mobility, and that understand the need for sustained investment to help these businesses start, grow, and thrive.

In addition to year-round technical assistance and counseling, WBCC hosts an annual conference focused on the continued development of small businesses. The conference features timely and relevant content on entrepreneurship, procurement opportunities, artificial intelligence and technology updates, financial literacy, and small business certifications. A small business expo is also included, providing entrepreneurs with the opportunity to showcase and sell their products and services. Partners such as the SBA, the City of Charlotte, Charlotte Business Inclusion, and Mecklenburg County typically participate by hosting exhibitor tables, further strengthening connections between small businesses and key resource providers.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Provide business owners capacity building programs to support business sustainability and economic self-sufficiency	Curriculum adjustment and deployment of 4 business building capacity programs (Cohorts) per year.	2 cohorts – 38 participants	4 cohorts per year 50 participants per year
Provide business owners capacity building programs to cover specific topics such as business management, financial literacy, marketing, leadership and technology	Curriculum adjustment and deployment of 2-hour workshops.	11 workshops – 157 participants	20 workshops per year 160 participants per year
Provide business owners in the Latino community with capacity building programs in Spanish to cover specific topics such as business management, financial literacy, marketing	Curriculum adjustment and deployment of 2-hour workshops, 1 time per quarter	2 workshops – 47 participants	4 workshops per year 40 participants per year
Partner with our affiliated CDFI, Institute Capital to provide programming on lending opportunities prepares small businesses to access capital via loans or grants and improve the health of their business	Conduct capital readiness workshops, partner with financial institutions and other community resources to increase financial literacy	1 program – 13 participants	4 programs per year 30 participants per year
Provide educational and networking opportunities to connect the small businesses in construction and transportation with	Conduct programs/networking events for small contractors & subcontractors to secure State, County, City, and/or US DOT contracts	4 programs – 50 participants	2 programs per year 50 - 100 participants total

Objective	Measure	FY2026 Mid-year	FY2027 Target
prime contractors and prepare them to access subcontracting opportunities			

Overall Program Budget

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2026 PROJECTED BUDGET	FY 2026 CITY REQUEST	
Personnel						
Salaries	\$202,997	\$203,771	\$208,160	\$218,568	\$30,000	14%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$38,369	\$39,704	\$59,705	\$62,690	\$7,500	12%
Subtotal Personnel Expenses	\$241,366	\$243,475	\$267,865	\$281,258	\$37,500	13%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)	\$4,518	\$3,406	\$3,000	\$3,150	\$1,500	48%
Facilities (e.g. rent, utilities)	\$22,419	\$6,789	\$18,840	\$19,782	\$4,000	20%
Office Supplies	\$1,549	\$3,272	\$3,000	\$3,150	\$1,500	48%
Travel & Training	\$23,839	\$19,933	\$26,181	\$27,490	\$2,000	7%
Technology	\$0	\$0	\$0	\$0	\$0	0%
Consultants	\$36,157	\$25,395	\$30,400	\$31,920	\$0	0%
Program Expenses/Workshops	\$64,977	\$97,924	\$16,000	\$16,800	\$0	0%
Printing & Postage	\$3,245	\$3,067	\$200	\$210	\$0	0%
Membership & Subscriptions	\$6,743	\$9,668	\$14,380	\$15,099	\$3,500	23%
Marketing	\$0	\$0	\$0	\$0	\$0	0%
Equipment Maintenance	\$974	\$934	\$2,600	\$2,730	\$0	0%
Indirect Cost/Other expenses	\$38,107	\$44,950	\$57,370	\$60,238	\$0	0%
Subtotal Operating Expenses	\$202,528	\$215,338	\$171,971	\$180,569	\$12,500	7%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2026 PROJECTED BUDGET	FY 2026 CITY REQUEST	
Total Expenditures	\$443,894	\$458,813	\$439,836	\$461,827	\$50,000	11%
Net Revenues	\$6,320	\$283,395	\$23,914	\$1,923		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$158,040	\$310,933	\$150,000	\$150,000
City Funding (financial partner or otherwise)	\$50,000	\$50,000	\$50,000	\$50,000
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding	\$171,250	\$284,250	\$175,000	\$183,750
Donor Contributions	\$2,250	\$5,000	\$5,000	\$5,000
Service Fees	\$22,474	\$37,175	\$25,000	\$25,000
Other Revenue	\$46,200	\$54,850	\$45,000	\$50,000
Total Revenues	\$450,214	\$742,208	\$450,000	\$463,750

Current Board of Directors

- | | | |
|----------------|-------------------------------|---------------------|
| Nikitra Bailey | Martin Eakes | Michael Hamuka |
| Suzanne Malone | Albert Rabon | Angelique Stallings |
| Tyron Baines | Ted Edwards | Adam Klein |
| Lewis Myers | Patricia Russel-McCloud, Esq. | Michael Suggs |

FY 2027 Financial Partner Agency Summary

Our Daily Bread

Agency Description

Our Daily Bread Foundation (ODB) advances Charlotte's Workforce and Business Development priorities by preparing historically underserved youth, primarily Black and Brown boys ages 13 to 15 for future economic stability through hands-on skill building, mentoring, and real-world learning grounded in the discipline of bread baking.

At ODB, bread is not symbolic, it is instructional. Through structured bread baking experiences, youth learn workplace behaviors that translate across industries and career pathways: showing up on time, following sequences, working collaboratively, managing mistakes, and completing tasks with care and accountability. These experiences are paired with financial literacy, communication skills, consistent adult guidance, and ServSafe Certification Training, preparing youth for real workforce environments and future employment opportunities in food service, hospitality, and other regulated or skill-based fields.

A defining feature of ODB's model is building kinship through bread baking. Youth work alongside caring adults and mentors, often referred to as Baking Buddies, who model professionalism, persistence, and real-world decision making. These relationships expose youth to career pathways, reinforce positive identity development, and create safe spaces where youth can ask questions, build confidence, and imagine themselves in future roles they may not otherwise see.

Cultural learning is embedded through Breads Around the World, where bakers from their home countries lead bread-baking sessions and share their personal stories. Youth and families are invited to experience cultures they may not otherwise encounter while strengthening communication skills, cultural awareness, and confidence. These sessions also reinforce the discipline, sequencing, and attention to detail required in workforce settings.

ODB's work extends beyond enrolled participants through collaborative workshops and conferences focused on financial wellness and entrepreneurship, including the Preneur Conference and the FinLit Financial Literacy Conference. Together, these efforts reflect ODB's core belief that when youth are equipped with practical skills, trusted relationships, and meaningful opportunities to contribute, they are better prepared to succeed in the workforce and strengthen their communities.

Current Financial Partner?

Yes

Agency Established

2018

FY 2027 Funding Request

\$90,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$297,515	\$90,000	30%

Funding Request Category

Overall Agency Budget

Total years financial partner with City of Charlotte

1 year

Funding History

FY2026
\$70,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 90 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	13	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	16	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	14	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>

Category	Max Points	Score	Excellent	Good	Fair	Poor
Organizational Capacity & Governance	15	13	13-15 <i>Strong leadership & policies</i>	10-12 <i>Adequate; minor gaps</i>	6-9 <i>Capacity concerns</i>	0-5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9-10 <i>Clear need; underserved focus</i>	6-8 <i>Need defined; limited data</i>	3-5 <i>Broad; limited justification</i>	0-2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3-4 <i>Partial diversification</i>	1-2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

During the most recent program year, Our Daily Bread Foundation served a total of 320 youth and families through a combination of direct programming, collaborative workshops, and community-based initiatives.

ODB directly served approximately 150 youth and families through year-round programming that integrates bread baking, mentoring, workforce readiness, financial literacy, and ServSafe Certification Training. Participants are primarily Black and Brown youth ages 13-15 and their families, with many youth referred through Youth Advocate Program (YAP), Grier Heights Community Center, and foster care placements. Many families face food insecurity, economic instability, limited access to enrichment opportunities, and ongoing exposure to stress and trauma.

ODB expanded its reach through collaborative learning opportunities, serving an additional 170 youth and families. This included 101 youth and families engaged through the _Preneur Conference and 61 youth and families through the FinLit Financial Literacy Conference, both focused on pathways to financial wellness, independence, and economic mobility.

In addition to enrolled participants, ODB extended support to families experiencing food insecurity through Loaves of Love, a community-based bread distribution initiative implemented in direct response to reductions in SNAP benefits. During the most recent program year, ODB baked and distributed 325 loaves of fresh bread to families through a community Thanksgiving event with Applesauce Group serving families in ZIP code 28218, as well as through Care Ring Food Pantry and Youth Advocate Program / ATV at the Nations Ford community. This ensured impact beyond formal program enrollment while addressing urgent community needs.

Describe the activities that will be supported through requested city funding

City of Charlotte funding will support Our Daily Bread Foundation’s workforce development model by strengthening staffing capacity, program delivery, and access for youth and families.

Funds will be used primarily to support program salaries, consistent with the prior year’s City investment, allowing ODB to maintain continuity, deepen impact, and responsibly scale services. With additional staffing, including a Program Manager and Program Assistant, ODB will increase its ability to coordinate programming, manage volunteers, strengthen partnerships, and serve more

youth consistently. These positions will bring ODB's full-time staff to five and provide the infrastructure needed to support growth while maintaining program quality.

City funding will support workforce skill development through structured bread baking that builds responsibility, teamwork, sequencing, and follow-through. Youth will continue to participate in ServSafe Certification Training, gaining foundational food safety knowledge aligned with workforce standards. Mentoring and kinship-building will expose youth to real-world experiences and career pathways, while financial literacy education will focus on budgeting, cost awareness, and informed decision-making.

City funding will also support community-based bread production and service learning through initiatives such as Loaves of Love. Through this initiative, youth apply workforce skills in real community settings while learning the importance of service and civic responsibility. In FY2027, ODB plans to expand Loaves of Love by increasing bread production, youth participation, volunteer engagement, and the number of community distribution partners served.

Together, these activities prepare youth for future employment while reinforcing stability, accountability, service, and connection. City investment enables ODB to scale impact responsibly and respond effectively to both workforce and community needs.

Strategies agency plans to implement to sustain the agency or program(s) in future years

If the City Council approves an agency's funding request, city-funding is allocated for only one fiscal year. Share the strategies your agency plans to implement to sustain the agency or program(s) in future years. Indicate plans for obtaining funds outside of city-funding.

If the City Council approves Our Daily Bread Foundation's FY2027 funding request, ODB will leverage this one-year investment to strengthen staffing capacity, deepen program quality, and position the organization for long-term sustainability and growth.

City funding will primarily support program salaries, allowing ODB to retain skilled staff, maintain continuity, and responsibly scale services. By adding a Program Manager and Program Assistant, ODB will improve coordination, volunteer management, data tracking, and partnership development, critical infrastructure needed to support growth beyond the City funding period.

To sustain programming in future years, ODB will continue to diversify its funding base through a combination of public and private grants, individual and corporate giving, and strategic partnerships aligned with workforce development, youth empowerment, and food security. ODB will also continue to expand community-supported initiatives such as Loaves of Love, which has proven to be a high-impact service model and a strong platform for donor engagement, volunteer involvement, and community partnerships.

In addition, ODB is advancing earned-revenue strategies through the future development of the It's All About the Dough Mobile Bakery, which will serve as both a workforce learning lab and a sustainable revenue source once launched.

Finally, ODB will continue strengthening evaluation and outcome tracking to clearly demonstrate impact. Strong data, consistent staffing, and trusted community partnerships will position ODB to

secure ongoing funding and continue serving Charlotte’s youth and families well beyond the FY2027 funding period.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Prepare youth for future workforce participation by building foundational workplace skills through structured, hands-on learning.	Number of youth participating in workforce-focused programming Consistent attendance and program completion rates	52 participants	Serve at least 175 youth directly through workforce-focused programming
Prepare youth for future workforce participation by building foundational workplace skills through structured, hands-on learning.	Demonstrated improvement in workplace behaviors (teamwork, communication, task completion, responsibility)	New Measure	At least 85 percent of participating youth demonstrate improvement in identified workforce behaviors
Prepare youth for future workforce participation by building foundational workplace skills through structured, hands-on learning.	Consistent attendance and program completion rates	New Measure	At least 80 percent of enrolled youth complete the program cycle
Increase financial literacy and economic decision-making skills for youth and families.	Participation in financial literacy instruction and workshops	39 participants	At least 175 youth participate in financial literacy education
Increase financial literacy and economic decision-making skills for youth and families.	Completion of budgeting and cost-awareness activities	41 engaged	At least 170 youth and families engaged through collaborative

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$35,091	\$46,609	\$76,500	\$92,000	\$90,000	98%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$0	\$0	\$0	\$5,661	\$0	0%
Subtotal Personnel Expenses	\$35,091	\$46,609	\$76,500	\$97,661	\$90,000	92%
Operating						

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$50,000	\$0	0%
Communications (e.g. publishing, marketing)	\$3,078	\$4,105	\$5,131	\$10,400	\$0	0%
Facilities (e.g. rent, utilities)	\$9,650	\$12,867	\$13,500	\$23,400	\$0	0%
Office Supplies	\$1,200	\$1,601	\$2,001	\$5,100	\$0	0%
Travel & Training	\$10,171	\$13,562	\$16,952	\$15,200	\$0	0%
Technology	\$1,603	\$2,138	\$2,672	\$2,604	\$0	0%
Other: Insurance	\$1,448	\$1,930	\$2,413	\$6,000	\$0	0%
Other: Program Participant Stipends	\$15,602	\$20,803	\$25,000	\$17,000	\$0	0%
Other: Program Support, Materials and Supplies	\$17,384	\$28,179	\$80,000	\$51,800	\$0	0%
Other: Professional Fees	\$7,450	\$9,933	\$14,899	\$18,350	\$0	0%
Subtotal Operating Expenses	\$67,586	\$95,118	\$162,568	\$199,854	\$0	0%
Total Expenditures	\$102,677	\$141,727	\$239,068	\$297,515	\$90,000	30%
Net Revenues	\$49,177	\$132,473	\$65,132	\$6,685		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner or otherwise)	\$63,749	\$33,750	\$100,000	\$90,000
Mecklenburg County Funding	\$75,000	\$125,000	\$150,000	\$30,000
Foundation Grants & Funding	\$9,955	\$25,000	\$20,000	\$155,000
Donor Contributions	0	0	0	\$25,000
Service Fees	\$3,150	\$4,200	\$4,200	\$4,200
Total Revenues	\$151,854	\$187,950	\$274,200	\$304,200

Current Board of Directors

Carla Scott
Kayrn Yaussy

Kim Alexander
Andrew Ladd

Pamela McCarter

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FY 2027 Financial Partner Agency Summary

Per Scholas, Inc.

Agency Description

Per Scholas is a national nonprofit with a proven track record of driving positive social change in communities across the country for over 30 years. We create pathways to economic mobility by equipping motivated individuals with skills for high-growth tech careers and by connecting graduates with leading businesses. Our tuition-free, employer-aligned model combines rigorous technical instruction, professional development, and wraparound services (like financial coaching and MSW-credentialed support) to prepare adults for careers in areas such as IT Support, Cybersecurity, Software Engineering, Cloud Computing, and Data Center Operations.

Per Scholas has a significant national history that underpins our local impact. Nationally, over 30,000 individuals have trained with our organization, contributing to economic growth and innovation across the country. Our effective model is proven, having been validated by two gold-standard randomized controlled trials, even through diverse economic conditions such as the period following the Great Recession. These studies consistently demonstrate the success of Per Scholas alumni, who, compared to their peers, experience a \$27,000 increase in earnings, a 50% reduction in reliance on public benefits, and higher reported levels of life satisfaction.

Since launching in 2020 from our Charlotte headquarters, Per Scholas North Carolina has enrolled over 1,200 learners in immersive, accelerated courses of which nearly 40% of learners enrolled reside within the City of Charlotte. The economic success of our North Carolina graduates is especially noteworthy; mean incomes have jumped from \$18,000 pre-training to starting wages above \$50,000—an increase of \$32,000 per year. Over the average career, this trajectory creates an estimated boost of \$1.8M in lifetime earnings, demonstrating how targeted, employer-focused training helps real people move up the economic ladder and access better opportunities.

Current Financial Partner?

No

Agency Established

1994

FY 2027 Funding Request

\$120,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$97,294,092	\$120,000	0.12%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule
✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 95 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	14	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	18	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	14	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	15	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Unlike other tech workforce programs, Per Scholas North Carolina provides high-quality technology training to a general adult population (18 years and older), without requiring tuition repayment. We train adults traditionally underrepresented in technology who have at least a high school degree/equivalent, have a US work authorization, and lack the economic, education, or professional resources to independently launch a career.

Of the over 450 Charlotte learners trained to date, 91% identify as people of color with the average age of learners at enrollment at 34 years. The gender split is nearly even with 49.5% of learners identifying as women and 50.5% identifying as men, and approximately 37% of Charlotte learners reported having children under the age of 18. Prior to training 40% of Charlotte learners listed a High School diploma or equivalent as their highest educational attainment. Lastly, our aim is to serve low-to-moderate income individuals (up to 80% of the area median income) with the average pre-training wage for Charlotte learners being less than \$20,100 per year, reflecting the economic challenges many face before entering our programs.

Describe the activities that will be supported through requested city funding

We believe our project, described in detail below, will significantly contribute to increased economic stability and employment opportunities because our comprehensive approach ensures that learners not only gain technical proficiency but also develop professional skills essential for career success. Specifically, our project advances several of the City's Workforce Development goals, most notably being Goal 8, Diverse and Resilient Economic Opportunity, listed in the Charlotte Future 2040 Comp Plan which states: "Charlotteans will have opportunity for upward economic mobility through access to a diverse mix of jobs and careers that align with education and skill levels of residents and the economic strengths of the region."

Per Scholas North Carolina's project most advances Goal 8, Objective M - Increase job-training opportunities that allow residents to obtain hard and soft skills needed to qualify for jobs within the City's target industries. We project enrolling at least 300 learners in which we estimate roughly 120 learners (40%) will be City of Charlotte residents.

Specifically, our programs meet this objective by offering full-time and immersive training (8-16 weeks) that is paired with professional development coaching, interview preparation, financial coaching, and MSW-credentialed learner support to help remove barriers that often prevent talented individuals from completing training or advancing in the workforce. Learners' curriculum is divided into two main components: technical training, or "hard skills," which makes up approximately 80% of our program, and Professional Development, or "soft skills training", which comprises the remaining 20%.

Specific to this project, Per Scholas North Carolina will offer Charlotte learners technical training (hard skills) in the following disciplines: Cloud Computing, Cybersecurity, IT Support, Software Engineering, and, new in 2026, Healthcare IT and Salesforce Administrator. Our employer-informed curricula leads to industry-recognized certifications, including CompTIA A+, AWS Cloud Practitioner (Amazon Web Services), Google IT Support Professional, CySA+ and more. Available in in-person, remote, and hybrid formats, training is designed to complement full-time work schedules, allowing participants to acquire stackable credentials that accelerate career progression.

Our Professional Development component provides learners with essential soft skills training focusing on communication, collaboration, giving and receiving feedback, and navigating career paths; all of which are vital for success in the workplace. In each cohort, learners participate in workshops designed to guide them through every step of launching a new career. Key topics include, but are not limited to, developing a career plan, executing a strategic job search, establishing a personal brand (such as a LinkedIn presence and an elevator pitch), preparing for interviews, negotiating job offers, and successfully navigating the onboarding process with a new company.

Additionally, learners have access to a comprehensive array of learners supports administered through our Learner Support Team (LST), such as financial counseling, benefits navigation, and stress management strategies, designed to provide a supportive learning environment. Further, through our Talent Solutions team, learners receive two years of career coaching post-graduation to help them find quality employment, advance their careers, and create a secure future. They benefit from our network of over 850 hiring partners nationwide, gaining direct connections to employers. Combined, both LST and Talent Solutions help to remove training burdens and bolster learner matriculation and post-training success.

Strategies agency plans to implement to sustain the agency or program(s) in future years

Per Scholas has a diversified revenue model built on philanthropy, earned income, and government funding, and is actively expanding each stream to support sustainable growth.

Philanthropy remains the largest source of revenue, accounting for roughly 75% in 2024. The vast majority of these funds have come from foundations and corporations, leaving the opportunity to significantly diversify through individual donors. In 2025, individual donors are projected to contribute approximately 15% of philanthropic revenue, which should dramatically increase as Per Scholas launches a new individual giving strategy next year.

In addition to philanthropic funds, government funding currently makes up about 10% of revenue. To preserve and strengthen this stream, we have hired the new staff leaders and have also restructured processes for more than 40 current public contracts, while instituting monthly reviews and cross-functional kickoffs for new publicly funded initiatives. Our national support staff are conducting a funding analysis to identify the best new local and state funding opportunities in North Carolina to help grow the share of annual government funding.

Lastly, a central strategy is growing earned revenue through our Talent Solutions practice, which spans everything from curated placements of Per Scholas graduates to customized training and upskilling programs for incumbent workers. Apprenticeships are rapidly becoming a growing area of opportunity, particularly as recent federal policy changes may reduce reliance on offshoring and increase demand for domestic pipelines. We also launched a paid Career Accelerator upskilling pilot for alumni in August 2025, and will be piloting the program for non-alumni in early 2026.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Maintain current annual percentage of enrollment from within the City of Charlotte	Track number of community-based recruitment events (orientations, career fairs, etc) held during the period of performance to ensure there is a robust pipeline of eligible applicants from the area	Aim to fill at least 40% of enrollment seats with Charlotte-based learners
Ensure learners receive comprehensive technical instruction and career readiness preparation to successfully enter the IT workforce	Provided between 275 hours (IT Support) to 350 hours (Cyber, AWS, Salesforce Administrator, Software Engineering) of hands-on, technical training and a minimum of 100 hours of professional development per cohort	Achieve and maintain a minimum graduation rate of 80% for Charlotte learners enrolled in the program throughout the period of performance
Increase industry-recognized certifications earned by learners in certification-based courses to better position themselves as job-ready candidates	Track number of learners utilizing learner support tools (Azari AI, tutoring, certification simulator tests, etc.) to help pass certification exams in cert-based courses	Achieve a minimum of 70% in certification-based courses to increase the percentage of learners who earn an industry-recognized certification or credential.

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2026 CITY REQUEST	
Personnel						
Salaries	\$969,476	\$2,031,073	\$2,102,161	\$2,175,737	\$95,652	4%
Merit	\$33,932	\$71,088	\$73,576	\$76,151	\$0	0%
Benefits	\$229,320	\$449,007	\$478,662	\$495,415	\$14,348	3%
Subtotal Personnel Expenses	\$1,232,728	\$2,551,168	\$2,654,399	\$2,747,303	\$110,000	4%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)	\$25,063	\$45,951	\$50,546	\$60,633	\$4,000	7%
Facilities (e.g. rent, utilities)	\$176,423	\$177,549	\$195,304	\$210,755	\$0	0%
Office Supplies	\$1,159	\$2,500	\$2,750	\$3,800	\$0	0%
Travel & Training	\$11,890	\$12,131	\$13,344	\$17,500	\$0	0%
Technology	\$49,307	\$38,821	\$42,703	\$57,388	\$0	0%
Other: Student Supplies	\$130,179	\$133,704	\$147,074	\$163,900	\$6,000	4%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2026 CITY REQUEST	
Other: Professional Services	\$9,152	\$2,500	\$3,000	\$4,500	\$0	0%
Other: Security Services	\$468	\$1,000	\$1,100	\$14,500	\$0	0%
Other: Business Insurance	\$15,505	\$10,000	\$12,000	\$15,000	\$0	0%
Other: Shipping and Postage	\$13	\$0	\$756	\$756	\$0	0%
Other: Graduation Expense	\$1,989	\$2,200	\$2,420	\$3,200	\$0	0%
Other: Finance Charges and Other Fees	\$55	\$0	\$375	\$450	\$0	0%
Other: Filing Expenses	\$200	\$0	\$500	\$500	\$0	0%
Other: Membership Fees	\$250	\$1,000	\$1,500	\$2,200	\$0	0%
Other: Hotels and Meals	\$3,862	\$3,950	\$5,500	\$6,725	\$0	0%
Other: Other Gifts and Donations	\$126	\$0	\$250	\$0	\$0	0%
Other: Parking	\$0	\$14,400	\$17,300	\$18,500	\$0	0%
Other: Miscellaneous	\$1,500	\$0	\$1,000	\$2,822	\$0	0%
Other: Depreciation	\$13,640	\$8,516	\$9,316	\$11,263	\$0	0%
Subtotal Operating Expenses	\$440,781	\$454,222	\$506,738	\$594,392	\$10,000	2%
Total Expenditures	\$1,673,509	\$3,005,390	\$3,161,137	\$3,341,695	\$120,000	4%
Net Revenues	\$440,792	-\$1,664,090	-\$2,092,471	-\$2,273,029		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$292,132	\$188,800	\$235,556	\$265,300
City Funding (financial partner or otherwise)	\$0	\$0	\$0	\$0
Mecklenburg County Funding	\$200,000	\$200,000	\$0	\$0
Foundation Grants & Funding	\$1,601,137	\$915,000	\$685,000	\$788,366
Donor Contributions	\$21,032	\$7,500	\$10,000	\$15,000

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Service Fees	\$0	\$30,000	\$0	\$0
Other Revenue:	\$0	\$0	\$0	\$0
Total Revenues	\$2,114,301	\$1,341,300	\$930,556	\$1,068,666

Current Board of Directors

- | | | |
|------------------|------------------------|---------------|
| Wale Akinwande | Ami Ariel | Plinio Ayala |
| Dr. Dwayne Brown | Kevin Brown | Kristen Chard |
| Jean Hill | Faith Rottmann Johnson | JC Lapierre |
| Josh Lieberman | Dirk Manelski | Lewis Miller |
| Indy Reddy | Rick Rioboli | Steve Rullo |
| Ian Schaad | Ian Shrank | Gregory Sills |
| Sanjay Sood | | |

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FY 2027 Financial Partner Agency Summary

PowerUP USA

Agency Description

Power Up USA is a Charlotte-based 501(c)(3) nonprofit organization that advances workforce and business development by expanding digital inclusion, career readiness, and entrepreneurship opportunities for residents across the city. Power Up USA designs and delivers hands-on training and support that helps youth, adults, and small businesses build the skills needed for sustainable wages, long-term employment, and participation in today’s digital economy.

A key part of Power Up USA’s service delivery model is CLT Creative Workspace, a Power Up USA program and community innovation hub that provides a collaborative environment for digital skills training, workforce development workshops, media/technology learning, and small business support. Through CLT Creative Workspace, Power Up USA convenes community partners and creates accessible pathways for residents to gain practical experience in technology, digital media, and entrepreneurship, connecting participants to resources, mentoring, and career-aligned opportunities.

Together, Power Up USA and CLT Creative Workspace strengthen Charlotte’s talent pipeline by offering training in digital literacy, workforce readiness, and emerging technologies, including AI, while also supporting entrepreneurs and community-based organizations with tools and guidance to grow and sustain their work.

Current Financial Partner?

Yes

Agency Established

2017

FY 2027 Funding Request

\$100,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$333,333	\$100,000	30%

Funding Request Category

Overall Agency Budget

Total years financial partner with City of Charlotte

2 years

Funding History

FY2025	FY2026
\$287,000	\$100,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Financial Statements	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
✓	✓	✓	✓	◇	✗	✓	✓	✓	✓

Submitted - ✓
 Incomplete - ◇
 Not submitted - ✗

As of 2/25/2026, IRS 501 (c)3 status has been revoked

Application Scoring

Total Score: 81 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	12	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	13	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	9	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	14	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	4	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Power Up USA directly serves Charlotte/Mecklenburg residents who face barriers to digital access and economic opportunity, including:

Youth (ages 8-18), especially students in underserved neighborhoods and youth participating in after-school and workforce-readiness programs.

Young adults and working-age adults seeking career pathways, job skills, certifications, and support re-entering the workforce.

Seniors (older adults) who need device support, digital literacy training, and ongoing coaching to access healthcare, benefits, and services online.

Households experiencing homelessness or housing instability (including youth experiencing homelessness) who need connectivity, devices, and guided support.

Low-income residents with limited access to reliable internet, devices, and digital skills training.

Minority- and historically under-resourced communities, including Black and immigrant/refugee community members, who benefit from culturally responsive digital inclusion programs.

Small businesses, nonprofits, and community-based organizations that need business development support, digital tools, and technology training to grow and serve the community.

Describe the activities that will be supported through requested city funding

City funding will support Power Up USA's Workforce and Business Development activities that expand digital inclusion, grow job-ready talent, and strengthen small businesses and community organizations. Funded activities will include:

Workforce training & career readiness

- Digital literacy and workplace skills training (basic computer skills, productivity tools, online job search, resume support, interview prep).
- Industry-aligned skills pathways (e.g., media/production, tech support, entrepreneurship tools) that connect participants to sustainable wages and benefits.

Youth workforce pipelines

- After-school and school-connected training that builds real-world skills through project-based learning (e.g., broadcasting/digital storytelling, media marketing, content production, and tech skill-building).
- Mentorship, portfolio development, and exposure to career pathways in technology and the creative economy.
- Internships, apprenticeships, and work-based learning
- Paid or stipend-supported placements and supervised projects with partner organizations and employers.

- Participant coaching and retention supports to help trainees transition into employment.

Digital inclusion services

- Device distribution and device support (intake, setup, troubleshooting, basic repairs) for residents who lack reliable technology.
- Refurbishment and reuse through local refurbishment partnerships, extending device life and reducing waste.
- Navigation support for affordable internet options and account setup (email, portals, telehealth, benefits access).
- Targeted outreach to priority populations
- Dedicated programming for seniors, youth, and residents experiencing housing instability/homelessness, with accessible training formats and ongoing coaching.

Small business and nonprofit capacity building

- Workshops and coaching to help entrepreneurs and small organizations adopt modern tools (CRM, email/text communications, scheduling, online payments, customer/member engagement).
- Support to strengthen operations, marketing, and sustainability, helping organizations grow and create local economic opportunity.
- Community convenings and partner-driven events
- City-aligned community events (like job-readiness trainings, digital equity pop-ups, and entrepreneurship sessions) that connect residents to services and opportunities.

Performance measurement & reporting

Data collection and reporting on participation, completions, devices supported/distributed, digital literacy gains, job placements/retention where applicable, and equity outcomes, aligned to City priorities.

If you paste the grant scope section (or tell me the program name + funding period), I'll tailor this into the exact language the application wants (more specific activities, deliverables, and outputs).

Strategies agency plans to implement to sustain the agency or program(s) in future years

Power Up USA will use City funding as a one-year catalyst while implementing a sustainability plan built on diversified revenue, stronger partnerships, and measurable outcomes that attract repeatable investment. Our strategies include:

Diversify earned revenue (fee-for-service and memberships)

- Expand fee-based training and technical assistance for small businesses, nonprofits, and churches (digital systems, AI productivity, communications/CRM support, and workforce upskilling).
- Scale earned-income offerings through CLT Creative Workspace programming, memberships, and sponsored workshops, with subsidized seats reserved for low-income participants.

Secure multi-year philanthropic and corporate support

- Package City-funded outcomes into a year-end “impact case” to pursue multi-year grants from foundations and regional/national funders focused on workforce, youth development, digital equity, and economic mobility.
- Grow corporate sponsorships and workforce partnerships with employers in technology, banking, healthcare, logistics, and media, aligning training to employer needs and securing recurring sponsorship dollars.

Leverage public funding beyond one-year City support

- Pursue county, state, and federal opportunities that align with our work (workforce development, digital inclusion, youth programming, apprenticeship/work-based learning, and technology access).
- Build braided funding models that combine public dollars + private dollars + earned revenue to sustain core staff and year-round programming.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Community Engagement	Number of community members participating in programs and events.	876 participants	Engage at least 1,000 participants annually through workshops, events, and digital equity initiatives.
Digital Equity and Inclusion	Percentage of participants from underrepresented or underserved communities.	86%	Ensure 80% of participants come from Opportunity Zones or other priority areas.
Seniors Adults	Number of Seniors trained annually in technology, Storytelling, and creative skills.	New Measure	Engage at least 100 Seniors annually through workshops, events, digital equity initiatives, and creative arts.
Workforce Development Capacity Building	Number of local artists and nonprofits trained in digital and creative skills.	80 individuals trained	Train at least 100 individuals annually in skills such as digital filmmaking, podcasting, and web design.

Overall Agency Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$0	\$0	\$102,000	\$102,000	\$100,000	98%
Merit	\$0	\$0	\$0	\$0	\$0	0%
Benefits	\$0	\$0	\$0	\$0	\$0	0%
Subtotal Personnel Expenses	\$0	\$0	\$102,000	\$102,000	\$100,000	98%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)	\$0	\$0	\$0	\$0	\$0	0%
Facilities (e.g. rent, utilities)	\$0	\$0	\$0	\$0	\$0	0%
Office Supplies	\$0	\$0	\$0	\$0	\$0	0%
Travel & Training	\$0	\$0	\$0	\$0	\$0	0%
Other: Program Operations / Contracts (Non-City)	\$0	\$0	\$231,333	\$231,333	\$0	0%
Subtotal Operating Expenses	\$0	\$0	\$231,333	\$231,333	\$0	0%
Total Expenditures	\$0	\$0	\$333,333	\$333,333	\$100,000	30%
Net Revenues	\$0	\$0	\$0	\$0		

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2026 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (City of Charlotte Financial Partnership)	\$0	\$0	\$100,000	\$100,000
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding (Other)	\$0	\$0	\$233,333	\$233,333
Donor Contributions	\$0	\$0	\$0	\$0
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0

Current Board of Directors

Darryl Radford
Craig Little

Eric Seabrook
Tommy Nichols

Gloria Kelly

FY 2027 Financial Partner Agency Summary

Prospera North Carolina

Agency Description

Prospera is the leading Hispanic nonprofit economic development organization in North Carolina, specializing in providing free bilingual business development services to under-served entrepreneurs and whose mission is to help, start and sustain and grow Latino-owned businesses to achieve community prosperity. The organization specifically provides expertise and in-culture and in-language support to existing and prospective disadvantaged Latino and non-Latino business owners by empowering them through training, support, and resources so their businesses can grow and prosper. Every entrepreneur is welcome to our program as we strive to make an impact in one economy for all.

Current Financial Partner?

Yes

Agency Established

2017

FY 2027 Funding Request

\$50,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$1,211,290	\$50,000	4%

Funding Request Category

Overall Program Budget

Total years financial partner with City of Charlotte

1 years

Funding History

FY2026
\$50,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓
 Incomplete - ◇
 Not submitted - ✗

Application Scoring

Total Score: 90 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	19	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	14	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	13	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	14	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	15	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	5	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Charlotte is a fast-growing city, and it continues to be home to large minority groups, including the state's largest Latino population. The majority of these residents are highly entrepreneurial and economically disadvantaged immigrants. Still, their chances of failure are high if they don't receive the specialized, culturally sensitive support they need.

In addition, Latino entrepreneurs deeply distrust institutions and come from disrupted societies in Latin America. When arriving in the U.S., they face racial issues. In addition, as they recognize that entrepreneurship is their best path to the American dream, they need to understand U.S. laws and regulations, tax requirements, financial systems, credit scores, and capital requirements. Cultural identity is an important nuance, and these new entrepreneurs often lack in-language and in-culture support as they set up and develop their businesses, especially in the initial phases. They tend to fail or not scale because they bring paradigms from their country of origin and face barriers such as:

- Limited or no business resources in their native language.
- Because they are born and raised outside the U.S., they need to learn and trust the legal, accounting, taxation, or licensing systems.
- Lack of understanding of financial literacy, banking, and access to capital. - They are accustomed to different business cultures and processes.
- They have been historically left behind.
- They lack access to trusted networks

Furthermore, the City of Charlotte's pockets of minority groups concentrated in areas continue growing with the in-migration of Latinos from other parts of the U.S. or Latin America. For example, with over 50 languages spoken and over 60 countries represented from around the World, Albemarle Road is one of Charlotte's most diverse areas in the city. The largest minority group concentrated in that corridor is low-income Hispanic immigrants.

Prospera asks every individual who receives services to complete a client intake form that collects household income information. This information is verified and updated to the CRM through the technical assistance process. Any household in the areas served with an income at or below 80% of the median income is considered low- to moderate-income (LMI). Last fiscal year 70% of Prospera's clients reported incomes at or below this threshold.

Describe the activities that will be supported through requested city funding

In partnership with the City's Economic Development Department, Prospera launched a pilot program to deploy consistent programming, resources, and on-site presence in the Albemarle Rd./Central Ave. Corridor a few years ago with COVID-era funding, and those funds have expired. Prospera is looking to continue offering a more consistent presence beyond 2024 throughout the city, particularly in the six Corridors of Opportunities. Those areas continue to have a high concentration of entrepreneurial activity and job creation, and we seek to continue supporting job retention and job creation across those areas by helping low-income diverse groups become economically independent through entrepreneurship.

Program beneficiaries will continue receiving free and confidential business specialized training and individual consulting focused on financial/business literacy to improve their likelihood of starting a business or scaling existing businesses.

The program activities will be as follow:

1. In-language business seminars about relevant topics, such as financing, starting a business in Charlotte, access to capital, marketing and managing an existing business, hiring and employee retention, etc. A total of 12 sessions will be offered throughout the year increasing the knowledge of 80 seminar participants.
2. Individual Consulting via in-house experts who will provide thorough analysis on critical financial management, starting and managing a business, marketing, etc. This program will serve 30 business owners through individual business consulting and support.
3. Access to Capital support to help in the process of obtaining traditional loans or micro-loans. Services include guidance on credit improvement, help to develop a business plan, and preparing loan and/or grant applications. This program will serve 10 entrepreneurs in receiving individualized support to apply for loans, micro loans and/or grants to start a business or improve operations to scale.

Strategies agency plans to implement to sustain the agency or program(s) in future years

Three factors will help the organization to obtain new funders and grow existing ones, guaranteeing the initiative's success and continuity:

1. Long-term relationships with corporate and government funders and with partners: Prospera's model has been historically funded mainly by long-term partnerships with private and public sector institutions for over 30 years, including state, county, and municipal governments, well-established corporations, reputable foundations, community leaders, and other stakeholders, including client donations, ensuring programs remain stable and sustainable.

Some funders have consecutively supported the organization and its programs in Charlotte since 2016 and have shown interest in continuing to do so. Furthermore, the work and success of this project will allow the organization to continue broaden its network and create relationships with funders and ecosystem partners who haven't been part of our network.

2. Prospera's proven track record: Prospera has served disadvantaged populations since its establishment in North Carolina. In its first eight years here, the organization has provided individual consulting services to over 2,000 entrepreneurs, trained over 3,000 participants, and helped secure over \$4.5M in capital. The organization has become more robust and more efficient with time, and it currently can serve over 400 individuals through personalized consulting and train over 700 through 50 educational sessions on an annual basis.

3. Continued population growth, including minority groups. For example, the growth of the Hispanic community between 2010 and 2020 in North Carolina was by 40% to 1.1 million people, and it continues to grow.

Current government and corporate funders that will help us continue our program within the city: State of North Carolina, Mecklenburg County, Z. Smith Reynolds Foundation, NC IDEA Foundation, Bank of America, Wells Fargo, First Citizens Bank, Bank OZK, to name a few.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Offer training to local Latino and non-Latino residents to become better prepared to start, stay and thrive in business.	Number of Training Sessions.	7 sessions	12
Train local Latino and non-Latino residents to help them become better prepared to start, stay and thrive in business.	Number of Training Attendees.	69 attendees	80
Assist local Latino and non-Latino residents to help to start a business or scale an existing business.	Number of Individuals Who Receive Business Consulting.	18 individuals	30
Assist local Latino and non-Latino residents in preparing and applying for access to capital (loans, micro loans and/or grants).	Number of Individuals Who Receive Access to Capital Support.	6 individuals	10

Overall Program Budget

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2026 PROJECTED BUDGET	FY 2026 CITY REQUEST	
Personnel						
Salaries (payroll taxes included)	\$578,517.66	\$653,368.25	\$544,210.00	\$544,210.00	\$37,250.00	7%
Merit	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Benefits	\$69,887.89	\$118,249.69	\$176,384.00	\$176,384.00	\$5,000.00	3%
Subtotal Personnel Expenses	\$648,405.55	\$771,617.94	\$720,594.00	\$720,594.00	\$42,250.00	6%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0%
Communications (e.g. publishing, marketing)	\$4,873.11	\$7,857.50	\$5,750.00	\$5,750.00	\$1,400.00	24%
Facilities (e.g. rent, utilities)	\$23,578.47	\$44,168.67	\$25,260.00	\$25,260.00	\$3,000.00	12%
Office Supplies	\$2,502.90	\$266.34	\$1,000.00	\$1,000.00	\$50.00	5%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2026 PROJECTED BUDGET	FY 2026 CITY REQUEST	
Travel & Training	\$37,741.72	\$36,672.00	\$33,450.00	\$33,450.00	\$0.00	0%
Technology/Software	\$14,700.00	\$65.76	\$18,200.00	\$18,200.00	\$300.00	2%
Other: Business Advance Services	\$19,125.00	\$23,650.00	\$25,250.00	\$25,250.00	\$0.00	0%
Other: Program Expenses	\$2,206.55	\$2,515.68	\$2,550.00	\$2,550.00	\$0.00	0%
Other: Shared Services	\$11,475.58	\$17,008.01	\$14,500.00	\$14,500.00	\$3,000.00	21%
Other: Fund Development	\$26,589.85	\$27,229.79	\$37,850.00	\$37,850.00	\$0.00	0%
Subtotal Operating Expenses	\$142,793.18	\$159,433.75	\$163,810.00	\$163,810.00	\$7,750.00	5%
Total Expenditures	\$791,198.73	\$931,051.69	\$884,404.00	\$884,404.00	\$50,000.00	6%
Net Revenues	\$797,468.13	\$657,615.17	\$331,886.00	\$331,886.00		

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2026 Projected Budget
Government Grants & Funding - Federal/State	\$953,486	\$5,792	\$157,500	\$157,500
Mecklenburg County Funding	\$93,791	\$56,209	\$0	\$0
Foundation Grants & Funding	\$438,000	\$625,000	\$525,000	\$525,000
Other Private Funding	\$103,390	\$70,000	\$533,790	\$533,790
Donor Contributions	\$0	\$0	\$0	\$0
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0
Total Revenues	\$1,588,667	\$757,001	\$1,216,290	\$1,216,290

Current Board of Directors

Rodrick Banks
Marta Tataje
Luis Abril
Dave Kaiser

Ray Chinn
Christi Floyd
Karen Bardales
Jaime Cuellar

Yovannie Rodriguez, Esq.
Zurilm Anuel
Joaquin Soria

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FY 2027 Financial Partner Agency Summary

SpringClean, Inc.

Agency Description

Springclean is a nonprofit social enterprise focused on creating economic opportunities through circular fashion and textile sustainability. Our mission is to create jobs and reduce items sent to landfill by repurposing donated textile materials. We are committed to educating and training individuals on the circular economy and paying livable wages to those who need it the most, who are often our neighbors in communities of color.

Since 2019, Springclean has diverted over 10,000 pounds of textiles from landfills while creating 75+ gig economy roles. Our programs serve 240+ individuals annually through workforce development training, youth education, and community workshops at our Camp North End boutique reaching 65,000+ monthly visitors.

Program Growth & Development

Our programming has expanded significantly since inception:

FY 2024: \$15,000 program revenue supporting basic workforce development activities and community workshops. All-volunteer operations with founder CT Anderson donating program leadership time pro-bono while employed full-time at Bank of America.

FY 2025: \$48,336 program revenue, 222% increase. Secured United Way \$25K capacity grant launching CircleUp Youth pilot. Camp North End boutique opened creating community education platform. CT donating program leadership time pro-bono through November after transitioning from corporate role in March.

FY 2026 Projected: \$285,000 program revenue including \$140K Mecklenburg County ABC Board grant for CircleUp Youth expansion. Plan to hire part time CFO, operations manager and two part-time shop manager's youth educators. Programs will serve 200+ participants annually, increased revenue due to FIFA World Cup partnership preparation Springclean will produce its first impact report.

FY 2027 Projected: \$462,000 program revenue including \$72K City of Charlotte partnership. This 31x growth from 2024 reflects extraordinary demand for circular economy workforce programming, City investment enables program quality enhancement and Raleigh expansion pilot.

Current Financial Partner?

No

Agency Established

2019

FY 2027 Funding Request

\$72,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$348,100	\$72,000	21%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Financial Statements	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum	
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	Submitted - ✓ Incomplete - ◇ Not submitted - ✗

Application Scoring

Total Score: 87 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	17	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	12	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	20	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	13	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>

Category	Max Points	Score	Excellent	Good	Fair	Poor
Organizational Capacity & Governance	15	12	13-15 <i>Strong leadership & policies</i>	10-12 <i>Adequate; minor gaps</i>	6-9 <i>Capacity concerns</i>	0-5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	9	9-10 <i>Clear need; underserved focus</i>	6-8 <i>Need defined; limited data</i>	3-5 <i>Broad; limited justification</i>	0-2 <i>Unclear/not compelling</i>
Sustainability Plan	5	4	5 <i>Diversified; strong sustainability</i>	3-4 <i>Partial diversification</i>	1-2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Springclean serves youth from middle school to college age and adult artists through several programs including our afterschool fashion program currently at Renaissance West STEAM Academy and our partnerships with Do Greater Foundation, and Urban Promise. The organization also operates a "resale boutique with a twist" in Camp North End (located in the North Graham/Tryon Corridor of Opportunity), that is run by high school and college student interns (Mayors Youth Employment Program, Charlotte Works, Little Listeners of the Carolinas) while featuring products and services provided by local artists, many who live and work in zip codes most likely impacted by climate change and those that are a part of the City of Charlotte's Corridors of Opportunity.

Describe the activities that will be supported through requested city funding

City investment in Springclean's program infrastructure creates sustainable workforce development model with multiple revenue streams ensuring long-term community impact:

Earned Program Revenue (23% of Program Budget)

\$120,000 FY 2027 from: youth-created product sales through Camp North End boutique and online, workshop participant fees on sliding scale ensuring accessibility, custom upcycling consulting services for corporations, licensing of CircleUp Youth curriculum to other organizations. Projected 25% annual growth based on proven demand through Green Sports Alliance membership including Charlotte Hornets, Mercedes Benz stadium, and FIFA2026.

Government Grant Portfolio (47% of Program Budget)

\$252,000 FY 2027 including: City of Charlotte \$72K (16%), Mecklenburg County Parks and Recreation \$40K (rec center pilots) \$140K Mecklenburg County ABC Board (30% - multi-year application for youth development). Strategic diversification reduces dependency on any single funder while demonstrating strong governmental support validating program effectiveness.

Foundation & Corporate Support (20% of Program Budget)

\$110,000 FY 2027 from: foundation grants (\$75K from United Way, Foundation for the Carolinas, Renaissance West), corporate sponsorships (\$35K). Expanded corporate engagement creates sustainable program funding beyond traditional grants.

Individual Donor Cultivation (4% of Program Budget)

\$20,000 FY 2027 through grassroots fundraising, board giving, and donor circles. 19-member Advisory Board includes leaders from Nike, Walmart, CBRE providing connections, contributions, and credibility enhancing program fundraising capacity.

Strategies agency plans to implement to sustain the agency or program(s) in future years

City investment in Springclean's program infrastructure creates sustainable workforce development model with multiple revenue streams ensuring long-term community impact:

Earned Program Revenue (23% of Program Budget)

\$120,000 FY 2027 from: youth-created product sales through Camp North End boutique and online, workshop participant fees on sliding scale ensuring accessibility, custom upcycling consulting services for corporations, licensing of CircleUp Youth curriculum to other organizations. Projected 25% annual growth based on proven demand through Green Sports Alliance membership including Charlotte Hornets, Mercedes Benz stadium, and FIFA2026.

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Foundation & Corporate Support (20% of Program Budget)

\$110,000 FY 2027 from: foundation grants (\$75K from United Way, Foundation for the Carolinas, Renaissance West), corporate sponsorships (\$35K). Expanded corporate engagement creates sustainable program funding beyond traditional grants.

Individual Donor Cultivation (4% of Program Budget)

\$20,000 FY 2027 through grassroots fundraising, board giving, and donor circles. 19-member Advisory Board includes leaders from Nike, Walmart, CBRE providing connections, contributions, and credibility enhancing program fundraising capacity.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Ensure high-quality program delivery and participant engagement	Percentage of CircleUp Youth participants completing full program cycle	80%
Build marketable skills for workforce readiness	Number of participants demonstrating proficiency in sustainable design, textile skills, or entrepreneurship (measured through portfolio assessment)	240+
Create pathways to employment and education	Percentage of program graduates connecting to employment, continuing education, or career	70%

Objective	Measure	FY2027 Target
	advancement within 6 months	
Provide living-wage work experience for interns, apprentices, gig workers and staff	Number of paid work hours provided to participants at \$12-\$25/hour	3,200+
Train young adults in professional alterations and tailoring	Percentage of Design Lab participants demonstrating proficiency in professional alterations techniques	80%

Overall Program Budget

	Expenditures FY 2024- FY 2026					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$0	\$2,000	\$120,000	\$165,000	\$30,000	18%
Merit	\$0	\$0	\$0	\$3,000	\$0	0%
Benefits	\$0	\$0	\$24,000	\$33,600	\$6,000	18%
Subtotal Personnel Expenses	\$0	\$2,000	\$144,000	\$201,600	\$36,000	18%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$800	\$10,000	\$15,000	\$4,000	27%
Communications (e.g. publishing, marketing)	\$400	\$718	\$5,000	\$8,000	\$2,500	31%
Facilities (e.g. rent, utilities)	\$5,013	\$12,904	\$28,000	\$42,000	\$7,000	17%
Office Supplies	\$8	\$20	\$1,500	\$2,500	\$1,000	40%
Travel & Training	\$167	\$7	\$2,000	\$4,000	\$2,000	50%
Technology	\$78	\$809	\$3,000	\$5,000	\$2,000	40%
Memberships	\$0	\$0	\$2,000	\$3,000	\$1,000	33%
Professional Services (legal accounting hr)	\$118	\$157	\$3,000	\$5,000	\$2,000	40%
Artist Grants	\$4,562	\$17,370	\$35,000	\$50,000	\$12,000	24%
Equipment Maintenance (sewing machines)	\$150	\$70	\$2,500	\$4,000	\$1,000	25%
Subtotal Operating Expenses	\$10,720	\$33,314	\$97,000	\$146,500	\$36,000	25%
Total Expenditures	\$10,720	\$35,314	\$241,000	\$348,100	\$72,000	21%
Net Revenues	\$4,280	\$13,022	-\$50,160	\$188,900		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner or otherwise)	\$0	\$0	\$5,840	\$72,000
Mecklenburg County Funding	\$0	\$0	\$40,000	\$180,000
Foundation Grants & Funding	\$0	\$25,000	\$50,000	\$110,000
Donor Contributions	\$0	\$986	\$10,000	\$20,000
Service Fees (FIFA and other sports partnerships)	\$15,000	\$22,000	\$70,000	\$120,000
Other Revenue (event space rental)	\$0	\$350	\$15,000	\$35,000
Total Revenues	\$15,000	\$48,336	\$190,840	\$537,000

Current Board of Directors

CT Anderson	Paula Anderson	Conroy Green
Bridgett Luther	Meko McCarthy Crawford	Andres Prieto
Kristen Schillings	Sherri Simmons	Tim Taylor
John Thigpen	Tony Waller	

FY 2027 Financial Partner Agency Summary

Sullenberger Aviation Museum

Agency Description

Sullenberger Aviation Museum is a dynamic nonprofit organization located in Charlotte, North Carolina, dedicated to inspiring the next generation of aviators, engineers, and innovators through immersive education and workforce development programs. As the region’s leading aviation museum, we offer hands-on STEM experiences that spark curiosity and prepare student, particularly those from underrepresented and underserved communities, for high-demand careers in aviation and aerospace.

Following a major transformation and reopening in 2023, the museum has evolved into an active educational hub, partnering with schools, industry leaders, and community organizations to create pathways into technical careers. Our signature program, Flight Forward, connects high school students to real-world aviation environments through field trips, internships, mentorship, and technical skill-building aligned with local workforce needs.

With a mission rooted in equity and access, Sullenberger Aviation Museum serves over 20,000 students annually and plays a vital role in Charlotte’s education and talent development ecosystem.

Current Financial Partner?

No

Agency Established

1992

FY 2027 Funding Request

\$248,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$3,771,463	\$248,000	7%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 87 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	18	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	13	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	18	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	12	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	14	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	10	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	2	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

The Flight Forward program directly serves high school students in CMS, with a focus on Title I schools and historically under-resourced communities. Participants are primarily minority, many of

whom will be first-generation college students, and most qualify for free or reduced lunch. These students often face systemic barriers to accessing STEM education, career exploration, and paid internship opportunities.

Building on 2 successful pilot years, we will expand Flight Forward in FY27 to serve students at three additional Charlotte-Mecklenburg high schools, reaching approximately 60 total students with monthly field experiences, skill-building workshops, mentorship, and paid summer internships. The program is designed to provide sustained, hands-on exposure to aviation and aerospace pathways, industries that offer high-wage, high-growth careers but remain underrepresented by individuals from marginalized backgrounds.

By centering equity and workforce development, Flight Forward aligns with the City of Charlotte's priorities around economic mobility, youth opportunity, and talent pipeline development.

Describe the activities that will be supported through requested city funding

City funding will support the strategic expansion of the Flight Forward program to three additional Charlotte-Mecklenburg high schools in FY27, reaching approximately 45 new students with career-connected learning opportunities in aviation, aerospace, and STEM.

Specific activities supported by this funding include:

- **Monthly Field Experiences:** Students will participate in structured visits to Sullenberger Aviation Museum and partner aviation sites (e.g., hangars, training centers, maintenance facilities, air traffic control, and flight schools), gaining exposure to real-world career environments.
- **Classroom-Based Curriculum:** Supplemental STEM and career-readiness lessons aligned with field trip content, including soft skills development, resume building, and aviation career mapping.
- **Paid Summer Internships:** Students will engage in six-week paid internships with local aviation and aerospace partners, gaining hands-on experience, mentorship, and entry-level technical skills.
- **\$1,000 Scholarship per Cohort:** Each school cohort will receive a \$1,000 scholarship to support a graduating senior pursuing post-secondary education or training in a STEM or aviation-related field, reinforcing the program's commitment to long-term career pathways.
- **Transportation & Access Support:** Funding will ensure all students can fully participate by covering transportation to and from program sites and internship locations, addressing a key barrier for many participants.
- **Program Materials & Supplies:** Includes hands-on learning kits, safety equipment, and other instructional materials needed to facilitate both on-site and in-class programming.
- **Staffing & Coordination:** Funding will support full and part-time program staff and coordinators who manage school relationships, field trip logistics, student support, and internship placements.

Together, these activities provide students with consistent, high-impact exposure to technical careers and help bridge the gap between classroom learning and workforce readiness, directly advancing Charlotte's goals around economic mobility and youth workforce development.

Strategies agency plans to implement to sustain the agency or program(s) in future years

Sullenberger Aviation Museum is committed to the long-term sustainability of the Flight Forward program and our broader mission to develop Charlotte’s future aviation and STEM workforce. While City of Charlotte funding is critical to supporting program expansion in FY27, we are actively pursuing a diversified funding strategy to ensure continued impact beyond the grant period.

Our sustainability approach includes:

- **Private Philanthropy & Foundations:** We are cultivating multi-year support from regional and national foundations with aligned interests in workforce development, education equity, and STEM innovation. Several funders have already expressed interest in scaling Flight Forward based on successful outcomes.
- **Corporate Partnerships:** We are deepening engagement with industry partners, particularly in the aviation, aerospace, and transportation sectors, who benefit directly from a stronger local talent pipeline. These partnerships include financial sponsorships, internship placements, and in-kind support such as equipment, materials, and professional mentorship.
- **Earned Revenue & Memberships:** As a museum, we generate revenue through general admissions, Frequent Flyer memberships, special events, and facility rentals. A portion of this earned revenue helps offset program costs and supports educational staffing.
- **School District & Government Partnerships:** We are exploring cost-sharing opportunities with Charlotte-Mecklenburg Schools and other local agencies to help cover transportation and internship coordination in future years, particularly as the program becomes embedded in school-year planning. Our pilot program at West Charlotte was funded by CMS through the ASC Education Funding program.
- **Alumni & Community Engagement:** Over time, we plan to engage Flight Forward alumni and their families as advocates and donors, reinforcing a culture of giving back and sustaining impact for future cohorts.

City funding in FY27 allows us to expand strategically while building the relationships and evidence base needed to sustain and grow Flight Forward in FY28 and beyond. Our long-term goal is to make this program a permanent offering for CMS high schools, reaching more students each year with consistent, high-quality workforce development opportunities.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Increase the number of local students who have awareness of and access to careers in aviation and STEM.	number of students participating in Title I School scholarship field trips during the 2025-2026 school year.	at least 3,000 K-12 students participate STEM field trips from Title I Schools in CMS.
Provide CMS students with a deeper understanding of and connection to careers in aviation and increase students' social capital by providing mentorships and soft skills training.	number of students participating in Flight Forward Program during the 2025-2026 school year.	45 total junior and senior students (up to 15 per school) participate in the Flight Forward Program.

Objective	Measure	FY2027 Target
Recruit students to the Program and engage them in a meaningful experience designed to connect them to education and career opportunities in aviation and STEM careers.	percentage of students who successfully graduate from the Flight Forward Program.	90% of junior and senior students successfully complete the Flight Forward Program.
Work with students and industry partners to design and develop the Flight Forward Program into a model that is easily replicated in other communities across the nation.	percentage of students and industry partners who express satisfaction with the program design and outcomes.	measure an 85% satisfaction rate from surveys of student participants and industry partners.
Execute a Program that encourages students to pursue careers in aviation and STEM and provide them with the necessary resources to ensure many go into these lucrative careers.	percentage of students who either attend post-secondary education with an intent to go into aviation or STEM fields OR who gain employment in those fields after completing the Flight Forward Program.	achieve a 50% post-secondary education and/or employment in aviation or STEM fields.

Overall Program Budget

	Expenditures FY 2025- FY 2027					Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$0	\$40,000	\$142,000	\$133,650	\$133,650	100%
Merit	\$0	\$0	\$5,000	\$4,950	\$4,950	100%
Benefits	\$0	\$0	\$28,000	\$26,400	\$26,400	100%
Subtotal Personnel Expenses	\$0	\$40,000	\$175,000	\$165,000	\$165,000	100%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0	\$0	0%
Communications (e.g. publishing, marketing)	\$0	\$5,000	\$14,500	\$20,000	\$20,000	100%
Facilities (e.g. rent, utilities)	\$0	\$0	\$0	\$0	\$0	0%
Office Supplies	\$0	\$7,500	\$7,500	\$15,000	\$15,000	100%
Travel & Training	\$0	\$5,000	\$30,000	\$22,500	\$22,500	100%
Technology	\$0	\$0	\$0	\$0	\$0	0%
Other: Student & Faculty Meals	\$0	\$7,500	\$7,500	\$7,500	\$7,500	100%

Expenditures FY 2025- FY 2027						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Other: Scholarships	\$0	\$0	\$1,000	\$3,000	\$3,000	100%
Other: Internships	\$0	\$0	\$2,000	\$15,000	\$15,000	100%
Subtotal Operating Expenses	\$0	\$25,000	\$62,500	\$83,000	\$83,000	100%
Total Expenditures	\$0	\$65,000	\$237,500	\$248,000	\$248,000	100%
Net Revenues	\$0	\$700	\$10,500	\$0		

Revenues				
	FY2024 Actual	FY2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner or otherwise)	\$0	\$0	\$0	\$248,000
Mecklenburg County Funding	\$0	\$0	\$0	\$0
Foundation Grants & Funding	\$0	\$50,000	\$65,700	\$0
Donor Contributions	\$0	\$0	\$0	\$0
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0
Total Revenues	\$0	\$50,000	\$65,700	\$248,000

Current Board of Directors

- | | | |
|-----------------|--------------------|---------------------------|
| Tim Miller | Marc Oken | Joe Valasquez |
| Shilpa Banerjee | Dr. John Daniels | Roddy Dowd, III |
| Jubal Early | Grant Hundley | Cody Keith |
| Ben Mears | Scott Mickle | Amy Rhyne |
| Glenn Sherrill | Dr. Gary Slaughter | Amanda Weisiger-Cornelson |

FY 2027 Financial Partner Agency Summary

The Boost Pad

Agency Description

The Boost Pad is a Charlotte-based nonprofit organization that advances inclusive economic growth by supporting early-stage entrepreneurs. The organization focuses on founders who are historically under-resourced and as a result underrepresented and in business ownership, including Black entrepreneurs, women, and immigrant founders who lack access to generational wealth, traditional capital, and institutional networks.

The Boost Pad delivers a structured, hybrid 14-week Accelerator program that combines business education, individualized mentorship, and access to early-stage capital. Programming is grounded in a three-pillar model “Capital, Curriculum, and Community” and results in measurable outputs including a validated business model, financial projections, pitch deck, and contract- and capital-readiness.

Since 2020, The Boost Pad has served over 170 entrepreneurs, 80% of whom identify as Black and 70% as women. Program alumni have collectively raised more than \$450,000 in capital and created over 500 local jobs, contributing directly to Charlotte’s small business ecosystem and workforce development goals.

In addition to education, The Boost Pad deploys startup capital, positioning the organization as both a business support provider and a grassroots investor. The Boost Pad’s sector focus, including construction, logistics, food innovation, main street businesses, and technology, aligns with City of Charlotte priorities related to workforce development, supplier diversity, and infrastructure-driven economic opportunity.

Current Financial Partner?

Yes

Agency Established

2019

FY 2027 Funding Request

\$103,500

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$469,200	\$103,500	26%

Funding Request Category

Agency Budget

Total years financial partner with City of Charlotte

1 year

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
✓	✓	✓	✓	X*	✓	✓	✓	✓	✓

Submitted - ✓
 Incomplete - ◇
 Not submitted - X

*Agency provided financial statements; however, budget is over \$100,000 which requires an annual audit.

Application Scoring

Total Score: 79 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	18	18-20 <i>Direct, compelling alignment</i>	14-17 <i>Clear alignment</i>	9-13 <i>General/indirect alignment</i>	0-8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	12	13-15 <i>Well-defined; outcome-connected</i>	10-12 <i>Clear; minor gaps</i>	6-9 <i>Underdeveloped</i>	0-5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	16	18-20 <i>Measurable outcomes; realistic targets</i>	14-17 <i>Adequate; mostly outcome-focused</i>	9-13 <i>Output-focused; limited detail</i>	0-8 <i>Unclear/missing</i>
Financial Health & Budget	15	11	13-15 <i>Complete; strong controls</i>	10-12 <i>Generally sound</i>	6-9 <i>Budget unclear</i>	0-5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	9	13-15 <i>Strong leadership & policies</i>	10-12 <i>Adequate; minor gaps</i>	6-9 <i>Capacity concerns</i>	0-5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	9	9-10 <i>Clear need; underserved focus</i>	6-8 <i>Need defined; limited data</i>	3-5 <i>Broad; limited justification</i>	0-2 <i>Unclear/not compelling</i>
Sustainability Plan	5	4	5 <i>Diversified; strong sustainability</i>	3-4 <i>Partial diversification</i>	1-2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

The Boost Pad serves under-resourced entrepreneurs throughout the City of Charlotte. While programming is open to all applicants, the majority of participants are Black founders, women entrepreneurs with personal incomes below \$80,240 and annual business revenues under \$75,000.

This population is often ineligible for other local accelerator programs that require minimum annual revenues of \$175,000 or more. The Boost Pad addresses this service gap by supporting early-stage entrepreneurs who are actively building businesses with the potential for job creation, supplier diversity participation, and long-term economic contribution.

By targeting founders at this stage, The Boost Pad directly supports the City's objectives related to inclusive economic growth, workforce development, and expanded participation of minority- and women-owned businesses in public-sector and infrastructure-related opportunities.

Describe the activities that will be supported through requested city funding

1. Accelerator Cohorts 12 and 13

City funding will support the implementation of two 14-week Boost Pad Accelerator cohorts, each serving 15-20 under-resourced, early-stage entrepreneurs. Core activities include:

- Structured business education and workshops
- One-on-one coaching and mentorship
- Training in business model development, customer acquisition, financial forecasting, marketing, legal compliance, and workforce planning
- Each participant will complete the program with a financial model, pitch deck, and pitch-ready presentation, increasing readiness for capital access, contract participation, and sustainable growth.

2. Licensing, Bonding, and Certification Training

City funding will also support programs delivered in collaboration with the City of Charlotte Business and Inclusion Office. This targeted training will prepare entrepreneurs to pursue public-sector contracting opportunities by providing instruction on:

- MWSBE and HUB certification pathways
- Bonding requirements and readiness
- City and County RFP and procurement processes
- This program will prioritize small businesses seeking to participate in City transit and transportation infrastructure projects, increasing the number of procurement-ready firms aligned with current and future infrastructure investments.

3. Economic Mobility, Workforce Development and Business Readiness

Collectively, these activities will increase business readiness, expand access to City contracting opportunities, and promote economic mobility. Outcomes include increased job creation, enhanced workforce skills, and greater participation of minority- and women-owned businesses in Charlotte's infrastructure supply chain.

Strategies agency plans to implement to sustain the agency or program(s) in future years

The Boost Pad employs a diversified sustainability strategy to ensure long-term program continuity beyond City funding:

- * Foundation and Institutional Support: Multi-year foundation funding and new philanthropic partnerships supported by improved impact measurement and reporting.
- * Corporate Partnerships: Ongoing sponsorships and engagement with financial institutions including Ally, PNC, and Bank of America.
- * Earned Revenue: A \$99/year online training platform generating recurring revenue and expanding program reach.
- * Individual Donor Development: Expansion of mid- and major-donor giving through a formal fundraising strategy and the launch of The Catalyst Circle.
- * Dedicated Fundraising Capacity: A full-time development professional with over ten years of experience leading fundraising and donor stewardship.

City funding will serve as a catalytic investment that enables The Boost Pad to scale impact while reducing long-term reliance on any single funding source.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Program Participation	Participation Goal	17 participants enrolled	30 participants
Program Participation	Access to Legal Services – CLIMB	New Measure	15 participants
Program Participation	Graduation Rate	New Measure	80% (24 of 30 participants)
Program Participation	Networking Events Attended	New Measure	100 events attended in total by all cohort participants
Program Impact	Number of Businesses Started / Pivoted	Not reported	20

Overall Agency Budget

The Boost Pad Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 Actual	FY 2026 BUDGET	FY 2027 Projected BUDGET	FY 2026 CITY REQUEST	
Personnel						
Salaries	\$102,000	\$115,000	\$175,000	\$210,000	\$50,000	29%
Merit	\$9,500	\$0	\$15,000	\$18,000	\$0	0%
Benefits	\$0	\$0	\$0	\$0	\$0	0%

The Boost Pad Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 Actual	FY 2026 BUDGET	FY 2027 Projected BUDGET	FY 2026 CITY REQUEST	
Subtotal Personnel Expenses	\$111,500	\$115,000	\$190,000	\$228,000	\$50,000	26%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$2,000	\$500	\$2,000	\$2,400	\$0	0%
Communications (e.g. publishing, marketing)	\$12,000	\$14,000	\$25,000	\$30,000	\$7,000	28%
Facilities (e.g. rent, utilities)	\$3,000	\$4,000	\$4,000	\$4,800	\$1,000	25%
Office Supplies	\$15,590	\$2,000	\$10,000	\$12,000	\$2,500	25%
Travel & Training	\$0	\$0	\$0	\$0	\$0	0%
Technology	\$3,000	\$7,116	\$10,000	\$12,000	\$3,000	30%
Other: Programing	\$20,500	\$17,300	\$50,000	\$60,000	\$15,000	30%
Other: Grants	\$18,500	\$16,800	\$25,000	\$30,000	\$7,500	30%
Other: Loans	\$0	\$0	\$25,000	\$30,000	\$7,500	30%
Other: Equity Investments	\$0	\$0	\$50,000	\$60,000	\$10,000	20%
Subtotal Operating Expenses	\$74,590	\$61,716	\$201,000	\$241,200	\$53,500	27%
Total Expenditures	\$186,090	\$176,716	\$391,000	\$469,200	\$103,500	26%
Net Revenues	\$35,710	-\$14,716	\$11,000	\$30,800		

The Boost Pad Revenues				
	FY2024 Actual	FY 2025 Actual	FY2026 Budget	Projected FY2027 Budget
Government Grants & Funding - Federal/State	\$50,000	\$0	\$125,000	\$125,000
Mecklenburg County Funding	\$0	\$0	\$50,000	\$75,000
Foundation Grants & Funding	\$160,000	\$125,000	\$140,000	\$160,000
Donor Contributions	\$10,000	\$30,000	\$50,000	\$75,000
Service Fees (Tuition)	\$1,800	\$7,000	\$12,000	\$15,000
Other Revenue (Sponsorships)	\$0	\$0	\$25,000	\$50,000
Total Revenues	\$221,800	\$162,000	\$402,000	\$500,000

Current Board of Directors

Doug Neal
Steven Lewis
Jerel Harvey
Samuel Merritt

Albert Lindemann
Joan Randall
Dr. Stephanie Kirkland
Irvine Sloan

Gary Palmer
DJ Bausdhuin
Keith Luedeman
Sr. Aimy Steele

FY 2027 Financial Partner Agency Summary

United Way of Greater Charlotte

Agency Description

United Way of Greater Charlotte (United Way) is a trusted community convener and funder committed to advancing economic mobility and strengthening historically underinvested neighborhoods across the Charlotte region. Since 1931, United Way has connected public, private, and nonprofit partners around shared goals to ensure that every resident has the opportunity to achieve stability and long-term well-being.

Through its flagship initiatives, United Neighborhoods and Unite Charlotte, United Way invests in local organizations and cross-sector, community-driven collaborations that address the interconnected factors influencing a family's ability to live, learn, and thrive. This includes access to affordable housing, education, reliable transportation, childcare, and health services, all of which are essential components of family and economic stability.

Our approach centers on place-based, holistic support systems that meet people where they are and remove barriers that limit opportunity. United Way partners with more than 75 local nonprofits, neighborhood associations, and municipal agencies to align resources, amplify resident leadership, and achieve measurable results that strengthen communities.

Each year, United Way's investments reach more than 75,000 residents, supporting programs that foster stability, self-sufficiency, and access to opportunity. By empowering residents and strengthening neighborhood networks, United Way helps create a more connected and resilient Charlotte for generations to come.

Current Financial Partner?

Yes

Agency Established

1958

FY 2027 Funding Request

\$220,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$14,337,355	\$220,000	2%

Funding Request Category

Program Budget

Total years financial partner with City of Charlotte

2 years

Funding History

FY2025	FY2026
\$130,000	\$130,000

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 93 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	20	18-20 <i>Direct, compelling alignment</i>	14-17 <i>Clear alignment</i>	9-13 <i>General/indirect alignment</i>	0-8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	15	13-15 <i>Well-defined; outcome-connected</i>	10-12 <i>Clear; minor gaps</i>	6-9 <i>Underdeveloped</i>	0-5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	18	18-20 <i>Measurable outcomes; realistic targets</i>	14-17 <i>Adequate; mostly outcome-focused</i>	9-13 <i>Output-focused; limited detail</i>	0-8 <i>Unclear/missing</i>
Financial Health & Budget	15	13	13-15 <i>Complete; strong controls</i>	10-12 <i>Generally sound</i>	6-9 <i>Budget unclear</i>	0-5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	14	13-15 <i>Strong leadership & policies</i>	10-12 <i>Adequate; minor gaps</i>	6-9 <i>Capacity concerns</i>	0-5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	9	9-10 <i>Clear need; underserved focus</i>	6-8 <i>Need defined; limited data</i>	3-5 <i>Broad; limited justification</i>	0-2 <i>Unclear/not compelling</i>

Category	Max Points	Score	Excellent	Good	Fair	Poor
Sustainability Plan	5	4	5 <i>Diversified; strong sustainability</i>	3-4 <i>Partial diversification</i>	1-2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

United Neighborhoods and Unite Charlotte primarily serve residents living in neighborhoods that have experienced decades of limited investment and opportunity, including many located within the City’s Corridors of Opportunity. These areas represent some of Charlotte’s most concentrated needs, but also the greatest potential for long-term stability and growth.

According to the Quality of Life Explorer (City of Charlotte and UNC Charlotte Urban Institute, 2025), residents across the Corridors of Opportunity face persistent barriers such as housing instability, underemployment, limited access to childcare, aging infrastructure, and transportation gaps that make it difficult to reach jobs, schools, and services. Neighborhood-level data from the Quality of Life Explorer show that United Way’s Community Quarterbacks are embedded in several neighborhoods across the Corridors of Opportunity. These include Renaissance West and the West Boulevard Neighborhood Coalition in the West Boulevard Corridor, CharlotteEAST and ourBRIDGE in the Albemarle/Central Corridor, North End Community Coalition in the Graham Street/N. Tryon Corridor, Lakeview Neighborhood Alliance in the Beatties Ford/Rozelles Ferry Corridor and additional neighborhoods within the Sugar Creek/I-85 and Freedom Drive/Wilkinson Corridors. These communities include families supported by single parents, multigenerational households, working adults earning below a living wage, and large populations of Black, African American, Hispanic, Latinx, and immigrant residents who continue to face systemic barriers to economic mobility.

By working directly within these neighborhoods, Community Quarterbacks and their partner agencies help residents navigate a complex landscape of challenges while building the local leadership, networks, and supports needed to advance community-driven stability and opportunity.

Describe the activities that will be supported through requested city funding

City funding will directly support two Success Coach positions embedded within United Way’s, neighborhood-based, Community Quarterback organizations. These trusted partners operate in historically disinvested communities and serve as essential hubs for resident support, coordination, and resource navigation. The addition of Success Coaches strengthens United Way's place-based model by placing staff directly in neighborhoods where many residents struggle with underemployment and affording basic needs such as food, transportation, housing, and utilities. Success Coaches help people address these pressures and build a path toward financial stability by addressing the social determinants of work. The determinants we will focus on are providing access, economic supports, educational supports, and behavioral and mental health supports.

United for ALICE (Asset Limited, Income Constrained and Employed) was launched by United Way of Northern New Jersey in 2009 as a pilot study to better understand households that earn above the Federal Poverty Level yet cannot afford basic living costs. Over the next decade, this research

expanded into a national measurement and advocacy movement that now spans more than 30 states. The focus on ALICE emerged in response to growing evidence that traditional poverty measures significantly understate the number of working households struggling with housing, childcare, transportation and other basic needs as wages lag behind the rising costs of living.

Using the ALICE framework as a foundation, Success Coaches work with individuals and families who are ALICE households that earn above the Federal Poverty Level yet struggle to afford the basics of childcare, transportation, housing, healthcare, and technology. According to United For ALICE (2024), more than one in three adults experiencing financial hardships are employed, demonstrating that employment alone is not enough to achieve stability. The report also documents that layered challenges such as unreliable transportation, lack of credentials, and limited digital literacy restrict residents' ability to participate in the workforce or advance within it.

These structural barriers contribute to cycles of financial strain that require consistent, relationship-based support rather than isolated referrals. Success Coaches provide those services by addressing immediate needs while helping residents build toward longer-term career and financial goals. The positions funded by the City will carry out the following activities:

Access:

Residents will be paired with a Success Coach within their neighborhood Community Quarterback agency, providing a consistent and trusted point of access to workforce opportunities. Success Coaches will work with adults and youth to understand their goals, assess readiness, and then help them decide what workforce development program or credentialing opportunity to pursue that is aligned with those goals.

Success Coaches will actively guide residents through enrollment, participation and completion of training programs, serving as a liaison for the individual and agency partners. This support continues throughout their program, job placement, and/or probational period of employment to promote retention and reduce early job loss. By offering sustained, relationship-based navigation rather than one-time referrals, Success Coaches help residents overcome barriers to participation and engagement as they move toward stable, living-wage employment.

Economic Supports

Residents who engage with a Success Coach may access short-term economic supports that address basic needs to reduce barriers to workforce participation and prevent disruption during training and early employment. These supports may include assistance with essential needs such as childcare, transportation-related expenses, or utilities. Partnering with agencies like Child Care Resources, a local nonprofit that connects families to affordable, high-quality early childhood education, ensures children are placed in quality learning centers.

Emergency Funds may be used to address critical needs such as rental assistance, utility assistance, and other issues that may arise. This approach responds to the financial fragility faced by many working households in the U.S., as nearly 4 in 10 adults report they would be unable to cover an unexpected \$400 expense without borrowing or selling personal items (Federal Reserve Board, 2023). Emergency assistance is made available through flexible grants provided by United Way to Community Quarterback organizations, allowing Success Coaches to quickly access and

deploy funds when a household experiences a crisis, ensuring timely intervention that prevents setbacks and supports continued progress toward employment and financial stability.

In addition, residents will receive financial literacy support to strengthen budgeting skills, financial planning and long-term stability. Economic supports are intentionally short-term and responsive, allowing Success Coaches to stabilize residents during critical periods so they can remain in credentialing or training programs, securing employment, or sustaining early job placement. Financial literacy support is particularly critical given that only 34 percent of U.S. adults demonstrate proficiency in basic financial concepts necessary for long-term stability, including budgeting, credit management, and savings (FINRA Investor Education Foundation, 2021).

Educational Supports

Residents will have access to digital literacy support, which is critical for workforce participation, as 92% of jobs require at least some level of digital skills and nearly 1/3 of U.S. workers lack the foundational digital skills needed for employment or advancement (National Skills Coalition, 2023). Participants will also have access to post-secondary training and credentialing opportunities that align with in-demand industries, allowing residents to build marketable skills, increase earning potential, and pursue sustainable career pathways.

Health and Mental Health Supports

To ensure residents can maintain their well-being while pursuing employment opportunities, Success Coaches connect individuals to support that address both immediate needs and longer-term stability. Many residents are managing stress, health conditions, and the demands of low-wage work, which makes consistent employment harder to sustain without coordinated support. Through individualized coaching and coordinated referrals, residents are connected to the following supports that promote stability and sustained workforce participation:

- Warm referrals to stability supports such as childcare resources, transportation assistance, financial coaching, digital literacy classes, and programs addressing food or utility needs. These resources help families cover the everyday basics that many cannot currently afford because wages often fall short of rising household expenses.
- Connections to health and behavioral health services to ensure residents can maintain their well-being while pursuing employment opportunities. Many residents are managing stress, health conditions, and the demands of low-wage work, which makes consistent employment harder to sustain without direct support.
- Support in navigating benefits and community programs that reduce financial strain and allow residents to participate fully in the workforce. This includes helping residents access programs that prevent crisis such as food assistance, childcare subsidies, or rental support, so they can stabilize enough to focus on training, credentialing, and better-paying employment.

By embedding Success Coaches directly within Community Quarterbacks, residents receive support from organizations they already know and trust. This neighborhood-based, relationship-driven approach helps reduce service fragmentation and prevents families from cycling in and out of crisis as well as completing workforce development programs or credentialing opportunities

which will lead to sustained employment. Moreover, this approach aligns with ALICE findings that households facing financial hardship benefit most from coordinated, ongoing navigation that facilitate stability, while building a path to opportunity (United For ALICE, United Way of Northern New Jersey, 2021).

These Success Coach positions expand the citywide effort to strengthen economic mobility, increase employment readiness, and advance the City Council's Workforce and Business Development priority.

Strategies agency plans to implement to sustain the agency or program(s) in future years

United Way of Greater Charlotte will sustain the Success Coach positions through a combination of diversified fundraising, strengthened public and private partnerships, and incorporation of these roles into United Neighborhoods' existing structure. City funding will provide the first-year foundation to fully implement these roles within neighborhood-based Community Quarterbacks, and United Way will pursue additional revenue streams to ensure the positions remain viable beyond the initial funding period.

Our sustainability plan aligns with United Way's Strategic Plan and includes the following strategies, each informed by our organizational commitment to diversifying revenue sources:

- Inspiring donor trust and expanding philanthropic revenue. United Way is actively strengthening donor engagement strategies. The Success Coach model directly aligns with the most recent donor priorities around economic mobility and workforce readiness, which position these roles for sustained investment from corporate partners, foundations, and individual donors.
- Expanding the donor pipeline and reimagining workplace campaigns. As part of our development refresh, United Way is broadening its donor base and modernizing workplace campaigns to attract new supporters. Workforce development and financial stability remain high-interest areas among donors, providing a strong platform for multi-year commitments to Success Coach positions.
- Exploring opportunities for public and private partnerships. United Way will work with municipal, county, and regional partners, as well as organizations such as Charlotte Works, to explore braided funding, cost-sharing, or future oversight where appropriate. These partnerships ensure long-term alignment within the broader workforce ecosystem and reduce reliance on a single funding source.
- Leveraging data, evaluation, and demonstrated impact. United Way will continue to monitor outcomes through the United Neighborhoods model, documenting improvements in employment readiness, job attainment, and financial stability. Strong evaluation results will enhance competitiveness for future grants and philanthropic support.

United Way remains committed to sustaining programs that strengthen Workforce and Business Development and expand economic opportunity. Through diversified fundraising, strategic partnerships, and continued evaluation, we will ensure that the Success Coach positions remain a durable and effective component of the citywide workforce support infrastructure.

For FY27, United Way of Greater Charlotte is requesting alignment under the Workforce and Business Development Strategic Priority rather than Great Neighborhoods. This reflects a refined

focus on workforce participation, job retention, and economic mobility outcomes associated with the Success Coach positions. Accordingly, the access and performance measures submitted with this application have been updated to track workforce-focused indicators rather than neighborhood-level measures.

Performance Measures and Targets

Objective	Measure	FY2026 Mid-year	FY2027 Target
Expand neighborhood level access to employment readiness services	Number of Success Coaches who reside in areas identified as high need through the ALICE framework or within Corridors of Opportunity	New Program for FY27	1 Success Coach
Improve access to stabilization supports that reduce barriers to employment	Number of referred residents who receive access to at least one support service such as childcare assistance, transportation, financial coaching, digital literacy training, behavioral health service	New Program for FY27	48 residents annually
Support resident participation in workforce advancement opportunities.	Number of individuals that have enrolled in or completed credentialing or training programs	New Program for FY27	40 residents annually
Increase employment or improved employment outcomes.	Number of residents who obtain new employment or improve wage stability/hours through better-paying jobs.	New Program for FY27	25 residents annually

Overall Program Budget

	Expenditures FY 2024- FY 2026				FY 2027 PROJECTED BUDGET - UN	FY 2027 CITY REQUEST	Percent city request of overall budget
	FY 2024 ACTUAL - AHFA	FY 2025 ACTUAL - AHFA	FY 2026 BUDGET - UN				
Personnel							
Salaries	\$357,848	\$353,714	\$162,290	\$322,290	\$160,000	50%	
Merit	\$0	\$0	\$0	\$0	\$0	0%	
Benefits	\$94,593	\$100,772	\$46,236	\$106,236	\$60,000	56%	
Subtotal Personnel Expenses	\$452,441	\$454,486	\$208,526	\$428,526	\$220,000	51%	
Operating							
Capital Equipment (e.g. vehicles, computers)	\$1,391	\$1,062	\$0	\$0	\$0	0%	
Communications (e.g. publishing, marketing)	\$110,388	\$100,000	\$9,821	\$9,821	\$0	0%	
Facilities (e.g. rent, utilities)	\$0	\$0	\$0	\$0	\$0	0%	
Office Supplies	\$0	\$0	\$0	\$0	\$0	0%	
Travel & Training	\$14,262	\$3,108	\$1,000	\$1,000	\$0	0%	

Expenditures FY 2024- FY 2026						Percent city request of overall budget
FY 2024 ACTUAL - AHFA	FY 2025 ACTUAL - AHFA	FY 2026 BUDGET - UN	FY 2027 PROJECTED BUDGET - UN	FY 2027 CITY REQUEST		
Technology	\$2,908	\$3,813	\$0	\$0	\$0	0%
Grant Awards	\$0	\$0	\$5,684,000	\$5,684,000	\$0	0%
Program Supplies	\$0	\$0	\$0	\$0	\$0	0%
Volunteers	\$4,237	\$7,450	\$69,610	\$69,610	\$0	0%
Professional Fees	\$0	\$0	\$0	\$0	\$0	0%
Finance Fees	\$0	\$0	\$0	\$0	\$0	0%
Liability Insurance	\$0	\$0	\$0	\$0	\$0	0%
Fundraising	\$67,500	\$53,250	\$10,000	\$10,000	\$0	0%
Other Expense	\$160,644	\$189,370	\$8,000	\$8,000	\$0	0%
Subtotal Operating Expenses	\$361,330	\$358,053	\$5,782,431	\$5,774,431	\$0	0%
Total Expenditures	\$813,771	\$812,539	\$5,990,957	\$6,202,957	\$220,000	4%
Net Revenues	\$182,068	\$1,015,345	-\$3,986,957	-\$4,198,957		

Revenues				
	FY2024 Actual - AHFA	FY2025 Actual - AHFA	FY 2026 Current Budget - UN	FY2027 Projected Budget - UN
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0
City Funding (financial partner or otherwise)	\$0	\$0	\$43,884	\$220,000
Mecklenburg County Funding	\$995,839	\$995,803	\$1,784,000	\$1,784,000
Foundation Grants & Funding	\$0	\$0	\$0	\$0
Donor Contributions	\$0	\$0	\$0	\$0
Service Fees	\$0	\$0	\$0	\$0
Other Revenue	\$0	\$0	\$0	\$0
Total Revenues	\$995,839	\$995,803	\$1,827,884	\$2,004,000

Current Board of Directors

Avaleen Crawford Williams	Beau Fisher	Bill Currens
Brian Middleton	Cathy Campbell	Dennis Williams
Dr. Rhett Brown	Hank Alston	Heather Kesner

Heather Tamol
John Fagg
Lula Jackson
Michael O'Leary
Raj Natarajan
Sil Ganzo

Hendrick Ellis
Keith Giddens
Marcel Solomon
Michelle Juliana
Ron Messenger
Todd Pearce

Joe Wall
Loretta Ayers
Michael Martino
Mitch Gibson
Shawn Heath
Will Pitts

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FY 2027 Financial Partner Agency Summary

Young Black Leadership Alliance

Agency Description

Young Black Leadership Alliance (YBLA) provides leadership, college and career readiness, financial literacy, and service opportunities tailored for high-potential Black youth ages 14 - 35 in Charlotte, NC.

YBLA's mission is to develop young Black men and women into leaders who positively impact their community. We help our young leaders achieve success and economic mobility through leadership development, college and career readiness, and life skills training. We empower our young Black leaders to become mentors, role models, and change agents who will impact their communities now and for the rest of their lives. Through leadership development, financial education, and service, YBLA empowers the next generation to lead with purpose, build wealth, and create positive, lasting change in society.

By equipping young leaders with the skills, knowledge and resources needed to build long-term economic stability, YBLA fosters economic mobility and financial literacy for young people in Charlotte. Our programs provide hands-on learning experiences, mentorship, and opportunities for social capital development, preparing young leaders to become financially independent leaders who drive positive change in their families, workplaces, and communities.

Current Financial Partner?

No

Agency Established

2006

FY 2027 Funding Request

\$150,000

FY27 Projected Overall Agency Budget	FY2027 Request Program	
\$2,021,396	\$150,000	7%

Funding Request Category

Agency Budget

Total years financial partner with City of Charlotte

N/A

Application Packet

Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Submitted - ✓

Incomplete - ◇

Not submitted - ✗

Application Scoring

Total Score: 88 / 100

Category	Max Points	Score	Excellent	Good	Fair	Poor
Strategic Priority Alignment	20	18	18–20 <i>Direct, compelling alignment</i>	14–17 <i>Clear alignment</i>	9–13 <i>General/indirect alignment</i>	0–8 <i>Weak/unclear alignment</i>
Program Design & Delivery	15	14	13–15 <i>Well-defined; outcome-connected</i>	10–12 <i>Clear; minor gaps</i>	6–9 <i>Underdeveloped</i>	0–5 <i>Vague/unrealistic</i>
Impact & Performance Measures	20	14	18–20 <i>Measurable outcomes; realistic targets</i>	14–17 <i>Adequate; mostly outcome-focused</i>	9–13 <i>Output-focused; limited detail</i>	0–8 <i>Unclear/missing</i>
Financial Health & Budget	15	14	13–15 <i>Complete; strong controls</i>	10–12 <i>Generally sound</i>	6–9 <i>Budget unclear</i>	0–5 <i>Deficient/not provided</i>
Organizational Capacity & Governance	15	15	13–15 <i>Strong leadership & policies</i>	10–12 <i>Adequate; minor gaps</i>	6–9 <i>Capacity concerns</i>	0–5 <i>Insufficient infrastructure</i>
Community Need & Population Served	10	9	9–10 <i>Clear need; underserved focus</i>	6–8 <i>Need defined; limited data</i>	3–5 <i>Broad; limited justification</i>	0–2 <i>Unclear/not compelling</i>
Sustainability Plan	5	4	5 <i>Diversified; strong sustainability</i>	3–4 <i>Partial diversification</i>	1–2 <i>Minimal planning</i>	0 <i>None described</i>

Population Served

Young Black Leadership Alliance (YBLA) directly serves Black youth and young adults across key life stages, from high school through early professional careers. Our primary populations include high

school students (grades 9-12), college students, and young professionals ages 21-35. Participants are primarily Black individuals who face systemic barriers to leadership development, career access, economic mobility, and exposure to professional networks.

Many of the students and young professionals served come from low- to moderate-income backgrounds, are first-generation college students or professionals, and attend under-resourced schools or work in early-career roles with limited access to mentorship and advancement opportunities. YBLA operates with an intentional focus on communities where Black youth and young adults experience gaps in academic support, workforce readiness, and leadership representation.

Through structured leadership development, workforce preparation, service learning, and mentoring, YBLA provides participants with skills, exposure, and networks needed to succeed academically, professionally, and civically. Programs are delivered in a supportive environment designed to build confidence, leadership identity, and a commitment to community impact.

Describe the activities that will be supported through requested city funding

YBLA's program is unique in that it intentionally works across all three stages of the talent pipeline, high school students, college students, and young professionals, creating a continuous, connected pathway that prepares participants for the workforce and supports long-term retention once they enter it.

Requested funding will support a coordinated set of workforce development and leadership activities delivered across YBLA's three leadership pipelines. Together, these activities are designed to prepare participants for successful entry into the workforce and support long-term workforce retention by building skills, confidence, and a strong connection to community.

High School Pipeline

City funding will support workforce readiness activities for approximately 80 high school students. Activities include a Career Exploration Day that exposes students to a wide range of career pathways and local employers, interactive career workshops focused on workplace expectations and career planning, and individualized career advising. These activities help students connect academic choices to future careers, build early professional awareness, and make informed post-secondary decisions.

College Pipeline

College-level activities will focus on preparing students to successfully transition into internships and full-time employment. Programming includes professional development workshops on resume writing, interviewing, professionalism, communication skills, and workplace readiness. Students will also complete the Truist Emerging Leaders Certification, strengthening leadership competencies valued by employers. In addition, participants will engage with key companies to learn about career opportunities, prepare for internship recruitment processes, and explore potential career pathways through employer engagement and exposure.

Young Professionals Pipeline

For young professionals transitioning from college into the workforce, city funding will support advanced skill-building and retention-focused activities. Programming includes foundational professional training along with project management, creative problem-solving, and critical thinking skills. Participants will also receive exposure to AI and technology tools increasingly used in today’s workplace. Service learning and team-based projects reinforce applied learning while strengthening leadership, collaboration, and accountability, skills essential for career advancement and long-term workforce success.

Cross-Pipeline Leadership & Service Learning

Across all three pipelines, participants engage in leadership development, service learning, and community service activities. These experiences ensure that participants develop not only technical and professional skills, but also a strong sense of responsibility, civic engagement, and commitment to the communities where they live and work. By integrating workforce preparation with leadership and service, YBLA develops well-rounded, workforce-ready leaders who are prepared to contribute meaningfully to employers and the broader community.

Strategies agency plans to implement to sustain the agency or program(s) in future years

YBLA has a diversified and sustainable funding model designed to ensure long-term program continuity beyond City funding. City support is used strategically to strengthen core programming while YBLA leverages multiple revenue sources to sustain and scale impact.

Key sustainability strategies include diversified philanthropic funding, including multi-year grants from corporate and private foundations; corporate partnerships and sponsorships that support workforce development, Career Exploration Day, and talent pipeline initiatives; and earned revenue, including participant or employer-paid program fees in select programs, particularly within the Young Professionals and college-level offerings.

YBLA also focuses on individual giving and alumni engagement, cultivating long-term donors who support leadership development across generations. Annual fundraising events and peer-to-peer campaigns further contribute unrestricted revenue to sustain operations.

Program sustainability is strengthened through YBLA’s lean operating model, centralized curriculum, and scalable delivery approach, allowing programs to continue efficiently even as funding sources vary year to year. YBLA also prioritizes strong data tracking and outcome reporting to retain funders and attract new investment.

Together, these strategies ensure YBLA can maintain and expand high-impact programming for Charlotte’s youth while reducing reliance on any single funding source, including City funding.

Performance Measures and Targets

Objective	Measure	FY2027 Target
Increase leadership and professional skill attainment among participants	% of participants demonstrating growth in leadership and workforce-ready skills based on self-assessment	75% of participants show measurable skill growth

Objective	Measure	FY2027 Target
Increase participants' access to professional networks and mentors	% of participants reporting increased social capital, including new professional connections, mentors, or employer relationships	90% of participants report increased social capital
Strengthen employer engagement and exposure to career pathways	% of participants who engage with Charlotte-based employers through site visits, internships, mentorships, or Career Exploration Day	75% of participants engage with at least one employer

Overall Agency Budget

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
Personnel						
Salaries	\$784,300	\$905,056	\$865,076	\$915,076	\$50,000	5%
Merit	\$4,425	\$23,250	\$0	\$0	\$0	0%
Benefits	\$86,288	\$106,536	\$126,033	\$133,355	\$0	0%
Subtotal Personnel Expenses	\$875,013	\$1,034,842	\$991,109	\$1,048,431	\$50,000	5%
Operating						
Capital Equipment (e.g. vehicles, computers)	\$3,489	\$2,472	\$3,000	\$3,000	\$0	0%
Communications (e.g. publishing, marketing)	\$42,641	\$57,602	\$3,618	\$3,618	\$0	0%
Facilities (e.g. rent, utilities)	\$50,000	\$50,000	\$51,800	\$51,800	\$0	0%
Office Supplies	\$5,155	\$5,238	\$6,361	\$6,361	\$0	0%
Travel & Training	\$149,545	\$99,496	\$26,020	\$26,020	\$0	0%
Technology	\$27,154	\$29,327	\$31,794	\$31,794	\$0	0%
Other: Program Related Expenses	\$570,442	\$464,398	\$546,771	\$616,771	\$70,000	11%

Expenditures FY 2024- FY 2026						Percent city request of overall budget
	FY 2024 ACTUAL	FY 2025 ACTUAL	FY 2026 BUDGET	FY 2027 PROJECTED BUDGET	FY 2027 CITY REQUEST	
(Scholarships, Trips, events, supplies, etc)						
Other: Contracted services (admin support, grant writer, technical support, ect)	\$347,588	\$173,548	\$82,500	\$112,500	\$30,000	27%
Other: Professional Fees (Legal, Accounting, Consulting)	\$34,916	\$37,297	\$31,788	\$31,788	\$0	0%
Other: Insurance (Org insurance)	\$12,842	\$11,637	\$14,504	\$14,504	\$0	0%
Other: Telephone	\$548	\$238	\$352	\$352	\$0	0%
Other: Depreciation & Amotization	\$9,983	\$9,983	\$12,339	\$12,339	\$0	0%
Other: (taxes, bank fees, etc)	\$9,518	\$15,938	\$62,118	\$62,118	\$0	0%
Subtotal Operating Expenses	\$1,263,821	\$957,174	\$872,965	\$972,965	\$100,000	10%
Total Expenditures	\$2,138,834	\$1,992,016	\$1,864,074	\$2,021,396	\$150,000	7%
Net Revenues	-\$205,689	\$23,124	\$336	\$3,014		

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
Government Grants & Funding - Federal/State	\$0	\$0	\$0	\$0

Revenues				
	FY2024 Actual	FY 2025 Actual	FY 2026 Current Budget	FY2027 Projected Budget
City Funding (financial partner and otherwise)	\$0	\$0	\$0	\$150,000
Mecklenburg County Funding	\$160,001	\$150,000	\$149,500	\$149,500
Foundation Grants & Funding	\$438,000	\$494,900	\$428,000	\$428,000
Donor Contributions	\$558,964	\$602,461	\$428,500	\$428,500
Service Fees	\$245,332	\$329,368	\$200,064	\$200,064
Other Revenue	\$530,848	\$438,411	\$658,346	\$668,346
Total Revenues	\$1,933,145	\$2,015,140	\$1,864,410	\$2,024,410

Current Board of Directors

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|--------------------|--------------------|----------------|
| Lashawn Cartwright | Namaine Coombs | Amy Dunbar |
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