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# **FY 2023 FINANCIAL PARTNERS APPLICATIONS**

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*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications.*

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Agency Name	FY 2022 Adopted Funding Amount	FY 2023 Funding Request	Page No.
<b>Financial Partners General Fund</b>			
Achieving Success on Purpose	N/A	\$69,301	<b>1</b>
Alliance Center for Education	\$90,000	\$130,000	<b>5</b>
Bengali Women's Forum Corp	\$10,000	\$10,000	<b>11</b>
Charlotte Center for Legal Advocacy	N/A	\$250,000	<b>17</b>
Charlotte Regional Business Alliance	\$166,553	\$167,322	<b>23</b>
Community Building Initiative	\$50,000	\$75,000	<b>27</b>
Greater Enrichment Program	\$200,000	\$200,000	<b>35</b>
Mental Health America of Central Carolinas	N/A	\$50,000	<b>41</b>
My Brother's Keeper CLT-Mecklenburg	\$50,000	\$90,000	<b>47</b>
National Institute of Minority Economic Development – The Women's Business Center of Charlotte	\$50,000	\$50,000	<b>51</b>
Safe Alliance	\$397,038	\$406,682	<b>59</b>
Sword of Spirit Outreach	N/A	\$463,500	<b>65</b>
Time Out to Care	N/A	\$165,533	<b>69</b>
TreesCharlotte	\$150,000	\$150,000	<b>73</b>
<b>Dedicated Revenue</b>			
Charlotte Center City Partners	\$6,232,801	\$6,511,389	<b>79</b>
Charlotte Regional Visitors Authority – Visit Charlotte	\$18,072,813	\$18,614,997	<b>83</b>
Charlotte Regional Visitors Authority – Film Commission	\$150,000	\$150,000	<b>85</b>
University City Partners	\$1,162,593	\$1,197,480	<b>89</b>
<b>Housing and Neighborhood Services</b>			
Carolinas Care Partnership <sup>1</sup>	\$2,938,627	\$3,085,558	<b>95</b>
Crisis Assistance Ministry <sup>2</sup>	\$425,000	\$550,000	<b>101</b>
DreamKey (formerly Charlotte Mecklenburg Housing Partnership) – Affordable Housing <sup>3</sup> House Charlotte <sup>3</sup>	\$1,690,000 \$231,000	\$1,960,000 \$281,000	<b>107</b>
Local Initiative Support Corporation (LISC) <sup>2</sup>	\$200,000	\$200,000	<b>113</b>

<sup>1</sup> Denotes federal funding

<sup>2</sup> Denotes PAYGO funding

<sup>3</sup> Combination of PAYGO and Federal Funding. Total PAYGO request is \$597,750

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# GENERAL FUND

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# FY 2023 Financial Partner Agency Summary

## Agency Name: **Achieving Success On Purpose, Inc.**

(New Funding Request)

### Mission Statement

Achieving Success on Purpose, Inc. was founded to help underserved youth develop the emotional and social intelligence needed to counteract delinquency and refute negative social narratives.

### Agency established

August 28, 2012

### Total years financial partner with City of Charlotte

First time applicant

### Population served

The direct population ASOP serves are youth between the ages of 12 to 17 years of age. We serve youth who are involved in the juvenile justice system, and "at-risk" youth dealing with substance abuse, mental health issues, peer relations, school behavior adjustments and marginal parenting. We served both male and female adolescents throughout Charlotte, NC.

Application Status										
Key		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	✗									
Achieving Success on Purpose		✓	✓	✓	✓	✗	✓	✓	✓	✓

#### Application notes:

- Annual Audit: While no formal Annual Audit (with two-year comparative financials) was provided, the organization did submit their own two-year comparative budget.

### Organization Funding Support

FY 2022 City Funding	FY 2023 City Funding Request	Difference
N/A	\$69,301	\$69,301

\*FY 2023 City funds requested for Personnel and Operating Expenditures.

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

The requested city funding will support the following program activities for ASOP:

- 1- Group therapy- Group therapy for 60 youth
- 2- Chess lessons - teaching the basics of Chess and how to apply the principles of Chess to real life situations
- 3- Parenting education workshops - offering parent education to the youth in our program
- 4- Art therapy - providing supplies and materials to youth for an art therapy workshop

## Overall Agency Budget

The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications.

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$51,350	\$76,960	\$228,280	\$0
Merit	\$0	\$0	\$0	\$0
Benefit	\$6,783	\$11,775	\$34,926	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$58,133</b>	<b>\$88,735</b>	<b>\$263,206</b>	<b>\$0</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$0	\$0	\$800	\$0
Facilities (e.g. rent, utilities)	\$0	\$0	\$0	\$0
Office Supplies	\$539	\$980	\$100	\$0
Travel & Training	\$259	\$3,430	\$500	\$0
Technology	\$0	\$0	\$0	\$0
Other (Please submit document with a breakdown of other)	\$19,302	\$19,290	\$24,350	\$0
<b>Subtotal Operating Expenses</b>	<b>\$20,100</b>	<b>\$23,700</b>	<b>\$25,750</b>	<b>\$0</b>
<b>Total Expenditures</b>	<b>\$78,234</b>	<b>\$112,435</b>	<b>\$288,956</b>	<b>\$0</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$96,812	\$280,280
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$100
Service Fees	\$51,831	\$52,000
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$148,643</b>	<b>\$332,380</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0



## Overall Program Budget

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$54,725	\$76,960	\$228,280	\$57,720
Merit	\$0	\$0	\$0	\$0
Benefit	\$6,965	\$11,775	\$34,926	\$8,831
<b>Subtotal Personnel Expenses</b>	<b>\$61,690</b>	<b>\$88,735</b>	<b>\$263,206</b>	<b>\$66,551</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$0	\$0	\$0	\$0
Facilities (e.g. rent, utilities)	\$0	\$0	\$0	\$0
Office Supplies	\$201	\$100	\$1,000	\$500
Travel & Training	\$232	\$3,430	\$1,500	\$500
Technology	\$0	\$0	\$0	\$0
Other (Please submit document with a breakdown of other)	\$3,597	\$4,547	\$6,575	\$1,750
<b>Subtotal Operating Expenses</b>	<b>\$4,031</b>	<b>\$8,077</b>	<b>\$9,075</b>	<b>\$2,750</b>
<b>Total Expenditures</b>	<b>\$65,721</b>	<b>\$96,812</b>	<b>\$272,281</b>	<b>\$69,301</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$96,812	\$272,282
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$0
Service Fees	\$51,831	\$52,000
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$148,643</b>	<b>\$324,282</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$69,301

## Current Board of Directors

Kareem Puranda, Board President

Lori Brown, Treasurer

Trevor Boone, Board Member

Michael Sherman, Board Member

Nalo Coban, Executive Director

Kim Hines, Secretary

Steve Durant, Board Member

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## FY 2023 Financial Partner Agency Summary

Agency Name: **Alliance Center for Education**

*(Current Financial Partner)*

### **Mission Statement**

Our mission is to provide high-quality education and support for children in need through partnership with their families.

Alliance Center for Education Inc.'s mission statement makes the following pledge:

To provide high-quality education and support for children in need through partnership with their families. In order for us to achieve our mission we:

- Provide services that are comprehensive, holistic and integrated in order to support the healthy development of children and families
- Build partnerships with those whom we serve to facilitate ownership of their personal growth and success
- Build partnerships with other individuals and organizations that provide services that are outside of our areas of focus but are critical in completely meeting the needs of those we serve
- Model and encourage stewardship of all resources, pennies, property and people
- Nurture and honor the uniqueness of each individual while instilling the values of collaboration, teamwork and citizenship

We feel our mission and core values continue to be in harmonious alignment with our approach to Out of School Time Services; supportive learning environments, exploring and valuing diverse cultures, empowerment of families, individualized enrichment and community involvement by providing a continuum of care.

### **Agency established**

January 01, 1940

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

4 years

### **Population served**

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

The Charlotte Chamber of Commerce's latest Economic Development report (2014) lists the zip- codes that make up Alliance Center for Education's service area and subsequently where our centers are located contain populations that only 17% of the residents have some college education collectively.

2010 US Census data states that approximately 12% of Mecklenburg County residents aged 25 or older do not have a High School Diploma or equivalent while the percentage of residents living in poverty is almost identical at 12.5% (approximately 115,000 people).

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Alliance Center for Education		✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A

## Organization Funding Support

FY 2022 City Funding	FY 2023 City Funding Request	Difference
\$90,000	\$130,000	\$40,000

*\*FY 2023 City funds requested for Personnel and Operating Expenditures.*

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

The Out of School Time Director's salary will be allocated 50% to the City funding. This position will be paid bi-weekly at \$2,653.84 per pay period based on a full-time equivalent FTE of 40 hours a week. Additional funding is being requested to move our Lead Teachers to full-time, 40-hour employees. In the current environment of the Covid-19 pandemic, retention is paramount to quality programming and student success, employees desire certainty in the workplace. These additional hours will be utilized to create collaboration with the school system to help foster a cohesive support system for the student's success and benefit while closing any academic gaps related to the pandemic. Program Lead Teachers will include 2 Lead Teacher positions, which will be allocated 100% to the City funding. These positions will be paid bi-weekly \$1,046.94 per pay period each, based on an FTE of 40 hours. The activities supported would be used to continue to build and develop ongoing relationships with community partners and feeder schools. They will be able to increase support in the areas of academics and CMS partnership support with volunteering, academic interventions, post-secondary explorations, and character building. Staff would also be more accessible to parents to enhance family engagement and support to the family through parent teacher conferences and parent workshops. This will also allow staff additional time for professional development for quality programming in the areas of mental health, trauma-informed care, and diversity training. Funding will be utilized to continue our investment in database subscriptions with ChidPlus and Cayenne software to track and communicate with students and parents related to enrollment, participation, and reporting outcomes. The remaining funds will be allocated to support curriculum-related materials to support STEAM activities, center instruction, and virtual learning.

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

Additional Funding utilization:

Payroll - \$39,700

Additional funding is being requested to fund an additional Lead Teacher as well as make both of these teachers full-time. In the current environment of the Covid-19 pandemic, retention is paramount to quality programming and student success, employees desire certainty in the workplace. These additional hours will be utilized to create collaboration with the school system to help foster a cohesive support system for the student's success and benefit while closing any academic gaps related to the pandemic. The total increase in funding for this change will be approximately \$38,275, including salary and payroll benefits.

Travel and Training - \$300

The remaining increases in funding are being utilized in the professional development of staff to maintain quality programming for the students. This training will include mental health, trauma-informed care, and diversity training.

**Overall Agency Budget**

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications.*

	Expenditures FY 2021-FY 2023			
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$6,720,351	\$6,073,139	\$5,767,129	\$88,941
Merit	\$0	\$0	\$0	\$0
Benefits	\$1,155,267	\$1,230,843	\$1,174,512	\$22,904
<b>Subtotal Personnel Expenses</b>	<b>\$7,875,618</b>	<b>\$7,303,982</b>	<b>\$6,941,641</b>	<b>\$111,845</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$297,888	\$0	\$0
Communications (e.g. publishing, marketing)	\$126,978	\$129,822	\$125,000	\$0
Facilities (e.g. rent, utilities)	\$1,539,013	\$1,323,315	\$1,328,815	\$12,030
Office Supplies	\$97,979	\$102,484	\$102,485	\$0
Travel & Training	\$221,803	\$207,004	\$180,005	\$300
Technology	\$207,693	\$149,855	\$125,515	\$5,825
Other (Please submit document with a breakdown of other)	\$2,649,465	\$2,428,914	\$2,303,211	\$0
<b>Subtotal Operating Expenses</b>	<b>\$4,842,931</b>	<b>\$4,639,282</b>	<b>\$4,165,031</b>	<b>\$18,155</b>
<b>Total Expenditures</b>	<b>\$12,718,549</b>	<b>\$11,943,264</b>	<b>\$11,106,672</b>	<b>\$130,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$9,518,746	\$8,652,747
Foundation Grants	\$140,003	\$123,000
Donor Contributions	\$185,356	\$195,330
Service Fees	\$57,578	\$45,731
Other Revenue	\$1,842,816	\$1,851,099
<b>Total Revenues</b>	<b>\$11,744,499</b>	<b>\$10,867,907</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$109,055
FY 2022 Current Budget	\$108,765
FY 2023 Projected (as requesting)	\$108,765

### Overall Program Budget

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$238,517	\$216,378	\$231,007	\$88,941
Merit	\$0	\$0	\$0	\$0
Benefits	\$40,530	\$43,638	\$54,901	\$22,904
<b>Subtotal Personnel Expenses</b>	<b>\$279,047</b>	<b>\$260,016</b>	<b>\$285,908</b>	<b>\$111,845</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$6,313	\$6,500	\$6,500	\$0
Facilities (e.g. rent, utilities)	\$42,472	\$38,724	\$42,925	\$12,030
Office Supplies	\$4,064	\$2,900	\$2,900	\$0
Travel & Training	\$8,846	\$11,620	\$11,620	\$300
Technology	\$6,247	\$7,500	\$7,500	\$5,825
Other (Please submit document with a breakdown of other)	\$79,405	\$83,645	\$93,552	\$0
<b>Subtotal Operating Expenses</b>	<b>\$147,347</b>	<b>\$150,889</b>	<b>\$164,997</b>	<b>\$18,155</b>
<b>Total Expenditures</b>	<b>\$426,394</b>	<b>\$410,905</b>	<b>\$450,905</b>	<b>\$130,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$30,000	\$30,000
Foundation Grants	\$23,000	\$48,000
Donor Contributions	\$157,765	\$132,765
Service Fees	\$1,375	\$1,375
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$212,140</b>	<b>\$212,140</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$109,055
FY 2022 Current Budget	\$108,765
FY 2023 Projected (as requesting)	\$108,765

## Performance Objectives Report

Goal	Measure	FY2022 Target	Year-End FY2021	Mid-Year FY2022
To promote self-sufficiency by providing specialized enrichment education to school-age children along with a variety of community awareness, crime prevention, cultural, social, and recreational activities designed to strengthen the basic academic and social skills of the youth and prepare them to make a positive contribution to society.	Number of students served who are at 80% or less AMI (Area Median Income)	75	79	31

## Current Board of Directors

Stephanie Dunn	VICE PRESIDENT: TBD	Micheline Matthews
Kim Langstaff	Alexandria Addison	Maudre' Addison
Andy Belk	Scott Burns	Samantha Dunbar
Stephanie Dunn	Barbara Holt	Kim Langstaff
Jorge Manjarres	Micheline Mathews`	Chris Shanahan
Lynne Wakefield	Ronda K. Williams	
<u>EX-OFFICIO MEMBERS:</u>		
Bishop Paul Leeland	Julia Willis	Lynda Morris
Rev. Dan Pezet		

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## FY 2023 Financial Partner Agency Summary

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

*(Current Financial Partner)*

#### **Mission Statement**

Mission Statement - "BWF strives to be the change catalyst and brings the change that society wants to see"

Narrative –

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

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

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

#### **Agency Established**

November 09, 2021

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

1 year

#### **Population served**

1. Served Afro American, Asian & American populations by running a cancer awareness program and providing a medical consulting platform with the renowned medical practitioners and Doctors of Charlotte
2. Leaders in making - Our Children is Civic Leaders is a flagship child education & recognition program to instill leadership tenets in the minds of young leaders. This program covers Asian, American and Afro American, and Latino communities
3. Providing financial support to the homeless people across races and ethnicity for their shelter and food during the pandemic
4. Uplifting the hygiene of the daily lives of the women across populations living below the poverty line by supporting Feminine care products to the community

5. In 2022 BWF is working with AAPI community (Asian-Americans and Pacific Islanders) for rooting out racism by building stronger relationships and supporting community-led solutions by leveraging the following levers
  - a. Conducting Training using social channels on “Harassment Intervention Training”  
This is getting conducted either through a volunteered led inhouse program or by partnering with an established social organization at Charlotte to make the participants aware that how important is to address even the seemingly inconsequential behaviors of any individual’s if noticed in a public place to prevent any large scale escalation of the matter which can lead into Harassment or major situation including loss of life.
  - b. Building social consciousness by highlighting matters through various BWF’s established channels
    - Campaign & fundraising to support the cause and stand beside the AAPI victims
    - Social awareness campaign through social media
  - c. To stand by the Victims, Victim’s families, the suffering society and provide them the necessary training and help build skills to overcome their financial impact by getting a good job in the Charlotte market. This objective will be aligned with the ongoing programs of BWF, i.e. through the Social & Economic Empowerment Program & Skill 2.0 program.
    - Social & Economic Empowerment Program – This program is focusing on improving the skills of the impacted AAPI person or their family members or impacted society members who have suffered substantial financial challenges due to the hate incident happened with their family or individuals and they are in dire need to re-establish themselves financially. BWF will stand beside them and will provide free coaching and help in building skills that will eventually help them to get jobs or help in rebuilding their business
    - Skill 2.0 program – This program is focusing on specifically the Victim’s children and help them to be “Future Ready”

Both of these programs fall under the 'Workforce and Business Development' strategic priorities of the city and an established operating model of BWF. The details of the same were shared previously as part of the 2022 grant request which got approved by City as the implementable model to stand beside the AAPI community and help them to be Strong Mentally & Financially.

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Bengali Women's Forum Corp.		✓	✓	✓	✓	N/A	✓	✓	✓	✓	✓

## Organization Funding Support

FY 2022 City Funding	FY 2023 City Funding Request	Difference
\$10,000	\$10,000	\$0

*\*FY 2023 City funds requested for Personnel and Operating Expenditures.*

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

Between 2019 and 2020, hate crimes nationally against Asian-Americans and Pacific Islanders increased to 150%, according to the center for the study of Hate and Extremism (Ref - <https://www.csusb.edu/hate-and-extremism-center>) at California State University, San Bernardino.

We have also noticed recently that

- On April 2nd, a local Asian-owned business in the Charlotte Transit Center, Plaza Sundries, was vandalized
- Just 12 days later, 37-year-old storeowner Devi Chauhan was shot in the chest while working at his Asian grocery store off Albemarle Road
- In March, six Asian American women were shot in Atlanta.

Further to that, on May 18, 2021, congress Passes a bill to counter The Rise In Anti-Asian Hate Crimes, which makes this a National issue.

The Bengali Women's Forum (BWF) condemns mounting violence against Asian-American and Pacific Islander communities (AAPI), BWF believes that rooting out racism by building stronger relationships and supporting community-led solutions is the way forward.

BWF was founded on various fundamental principles like equity for equality, equal opportunity, and opportunity for well-being. With the backdrop of these hate incidents, BWF finds its Mission Statement as apt with the cause, i.e. "BWF strives to be the change catalyst and brings the change the society wants to see". Future Road maps

There have been over 30 recorded anti-Asian hate incidents in Charlotte since March of last year and BWF believes that the AAPI community needs support in multiple ways and therefore proposing the following avenues to increase the outreach to AAPI owned businesses, families, and women.

#### **1. Conducting Training using social channels on "Harassment Intervention Training"**

This will be conducted either through a volunteered led inhouse program or by partnering with an established social organization at Charlotte to make the participants aware that how important is to address even the seemingly inconsequential behaviors of any individual's if noticed in a public place to prevent any large scale escalation of the matter which can lead into Harassment or major situation including loss of life.

#### **2. Building social consciousness by highlighting matters through various BWF's established channels**

- Campaign & fundraising to support the cause and stand beside the AAPI victims
- Social awareness campaign through social media

#### **3. To stand by the Victims, Victim's family, the suffering society and provide them the necessary training and help build skills to overcome their financial impact by getting a good job in the**

Charlotte market. This objective will be aligned with the ongoing programs of BWF, i.e. through the Social & Economic Empowerment Program & Skill 2.0 program.

- Social & Economic Empowerment Program – This program will focus on improving the skills of the impacted AAPI person or their family members or impacted society members who have suffered substantial financial challenge due to the hate incident happened with their family or individuals and they are in dire need to re-establish themselves financially. BWF will stand beside them and will provide free coaching and help in building skills that will eventually help them to get jobs or help in rebuilding their business
- Skill 2.0 program – This program will focus on specifically the Victim’s children and help them to be “Future Ready” Both of these programs fall under the 'Workforce and Business Development' strategic priorities of the city and an established operating model of BWF. The details of the same were shared previously as part of the initial grant request and the same has been furnished below as the implementable model to stand beside the AAPI community and help them to be Strong Mentally & Financially.

## Overall Agency and Program Budget

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications.*

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$0	\$1,800	\$1,800	\$1,800
Merit	\$0	\$0	\$0	\$0
Benefits	\$0	\$0	\$0	\$0
<b>Subtotal Personnel Expenses</b>	\$0	\$1,800	\$1,800	\$1,800
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$1,200	\$1,200	\$1,200
Communications (e.g. publishing, marketing)	\$0	\$1,200	\$1,200	\$1,200
Facilities (e.g. rent, utilities)	\$0	\$1,000	\$1,000	\$1,000
Office Supplies	\$0	\$600	\$600	\$600
Travel & Training	\$0	\$3,000	\$3,000	\$3,000
Technology	\$0	\$600	\$600	\$600
Other (Please submit document with a breakdown of other)	\$0	\$600	\$600	\$600
<b>Subtotal Operating Expenses</b>	\$0	\$8,200	\$8,200	\$8,200
<b>Total Expenditures</b>	<b>\$0</b>	<b>\$10,000</b>	<b>\$10,000</b>	<b>\$10,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$10,000	\$10,000
Foundation Grants	\$0	\$0
Donor Contributions	\$1,000	\$1,000
Service Fees	\$0	\$0
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$11,000</b>	<b>\$11,000</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Performance Objectives Report

### Corporate Scorecard Objective: - Social & Economic Empowerment

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Develop a framework for Social & Economic empowerment	Enhancement and providing a platform for all	Program & Platform is open for all in the community Frequencies of program rollouts and participants The program will target participation through freememberships	NA	<ul style="list-style-type: none"> <li>- 1 session organized</li> <li>- 80+ participants trained</li> <li>- Free education offered to adults and children</li> </ul>
	Direct outcome: eventually, the participants get the job according to their capabilities and continuation with the program	Number of participants get the job	NA	N/A
	Indirect outcome: individual performance improvements in one or all of the identified parameters such as Psychological, Social, Human capabilities, and Individual assets	Participants to appraise the effectiveness of these events on a larger scale through training feedback	NA	<ul style="list-style-type: none"> <li>- 80+ participants</li> <li>- 50 feedbacks documented with highest rating to denote that this training was highly effective and brings value to the participants in the communities</li> </ul>

**Corporate Scorecard Objective: - Future-ready workforce Development (Skill 2.0 program)**

*Note: BWF could not organize any interaction session or conduct any community drive due to the COVID situation; therefore, the entire program calendar has been delayed by half year. BWF is initiating the planning and execution of all programs effective from Jan 2022.*

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Develop the soft skills to be future-ready—Skill 2.0 program	Enhancement and providing a platform for all	Program & Platform is open for all in the community  Frequencies of program rollouts and participants  The program will target participation through free memberships	NA	
	Direct outcome: the participants receive weeks of training	Participants receive four to five (based on the course) weeks of training  Participants have a forum to present their learning through the “Leaders in Making” banner to the renowned personalities in society  Participants receive certification for performance	NA	
	Indirect outcome: individual performance improvements in one or all of the identified parameters such as Psychological, Social, Human capabilities, and Individual assets	Participants to appraise the effectiveness of these events on a larger scale through training feedback	NA	

**Current Board of Directors**

Shanta Dutta,  
President & Chair of the Board

Mehreen Muner,  
Board Director

Animita Chowdhury Saha,  
Board Director

Saswati Collam,  
Board Director

Karli Bose,  
Board Director

Dhanonjoy Chowdhury Saha,  
Advisor

Ritu Mukherjee,  
Advisor

Lopamudra Das Roy,  
Advisor

FY 2023 Financial Partner Agency Summary  
Agency Name: **Charlotte Center for Legal Advocacy**  
*(New Funding Request)*

**Mission Statement**

Our mission is to pursue justice for those in need.

**Agency established**

September 09, 1967

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

First time applicant

**Population served**

The US Census indicates that 13.9% of Mecklenburg County residents are foreign-born and 18.2% speak a language other than English at home.

In a recent statewide survey of legal needs, clients surveyed indicated the need for immigration legal assistance as one of the two highest, with family law. Legal assistance in immigration cases is extremely limited in most NC communities due to scarce resources and the need to travel to Charlotte, where the court is located, to appear for court hearings.

Immigrants that do not have legal immigration status are among those most vulnerable to exploitation in our community. A large portion of these individuals live with the reality that each day could be their last with their spouse, children and/or other family members.

Immigration and Customs Enforcement (ICE) has the authority to detain and place individuals in removal proceedings in immigration court. In the Carolinas, all individuals in removal proceedings must go to Charlotte's Immigration Court ("CIC"), where the odds are extraordinarily high—46%--that they will be ordered to leave the US.

From FY 2016 to FY 2021, 90,853 North Carolina foreign-born residents have been placed in removal proceedings in the CIC. Thirty-one percent, over 28,000, are Mecklenburg County residents.

The CIC ranks last in the country--tied with the Atlanta Court—for granting asylum claims or other humanitarian relief. Only 15% of the 3,462 asylum applications filed in CIC were granted, compared to the nationwide asylum grant rate of 47.7%. Lawyers who practice in the CIC observe anecdotally that they have never seen even one unrepresented respondent receive asylum.

The deplorable outcomes for immigrants in the CIC are directly related to the lack of representation for immigrant respondents in the CIC. The CIC had the lowest proportion of respondents who are represented by an attorney of any state in the nation based on a study of data available June 28, 2021, by Syracuse University Transactional Records Access Clearinghouse ("TRAC") available at <https://trac.syr.edu/immigration/>. Only 17.2% of Mecklenburg County residents in removal proceedings have legal representation compared to a national average of 60.2%.

Lack of status destabilizes almost every facet of life for undocumented immigrants.

Here are just a few of the onerous challenges that undocumented immigrants face: First, they are preyed upon by unscrupulous employers who pay less than what they would be required to pay employees with work authorization. It is not unusual for immigrants to put in hours, days or even weeks of labor only to be stiffed entirely of their wages by an employer despite legal obligations owed under NC's Wage and Hour Law. Second, predatory landlords extract unlawful fees from immigrant tenants, who lack bargaining power because the housing supply is extraordinarily limited for individuals without Social Security Numbers. Landlords know that what immigrant tenants fear most is a report to the immigration authorities and, therefore, they are much less likely to press for their right to habitable housing and/or complain about an unlawful eviction.

The exploitation of immigrants who lack status a profound impact on their children, many of whom are US citizens (more than 22 million people in the US live in households where at least one undocumented person lives with US citizens) and regularly face the prospects of homelessness and inadequate nutrition. Education is likely to present serious challenges for these young US citizens because it is exceedingly difficult to receive support from parents who are trying to navigate the above-described web of injustice.

The above-described exploitation will be a daily reality for the Afghans who are arriving in our community even though most are not currently in removal proceedings. There are approximately 300 of these individuals who are expected to arrive in Charlotte over the coming months, of about 1,200 statewide. A large share of these individuals is here pursuant to a grant of humanitarian parole, which will expire in two years or less. In order to remain in the US, they will need to apply for some form of more permanent immigration relief. For many, that will mean an asylum application and the one-year filing deadline, calculated from the date of entry into the US, that attaches to all asylum applications. Asylum applications can require months of work to adequately prepare, so these Afghani arrivals in Charlotte will need to secure legal representation immediately to begin their asylum applications.

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Charlotte Center for Legal Advocacy		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

## Organization Funding Support

FY 2022 City Funding	FY 2023 City Funding Request	Difference
\$0	\$250,000	\$250,000

*\*FY 2023 City funds requested for Personnel and Operating Expenditures.*



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

Funding from the City of Charlotte will allow the Advocacy Center to build on our structure of expert legal advocates and a screening system that is already in place to engage vulnerable immigrant clients. Our help desk in the CIC enables us to greet and assist immigrant respondents when they first present in court.

We provide safe release services and an orientation to immigration court to family members and relatives (called sponsors) who take physical custody of unaccompanied children apprehended at the border. The above-described services, when combined with our bilingual intake line, mean that the cases come to us. We propose hiring two full-time attorneys and a part-time paralegal with the requested funding. We expect to do the following with this additional staffing:

1. Provide free representation to an additional 100 immigrant resident of Charlotte in removal proceedings.
2. Provide free representation to 80 Afghani immigrants who are residents of Charlotte but not in removal proceedings.
3. Educate immigrants on their rights in the event of an encounter with Immigration and Customs Enforcement (ICE) officials.
4. Educate community organizations on how to protect immigrants who receive services from them.
5. Educate immigrants on emergency planning and prepare powers of attorney and other advance directives.

We will endeavor to obtain lawful status for all individuals whom we undertake to represent. The type of legal status that we seek will depend on the facts and circumstances that pertain to the individual. Many juveniles will have colorable claims for Special Immigrant Juvenile Status ("SIJS") and that immigration classification would enable us to seek lawful permanent resident status for the child. Adults and juveniles may have colorable claims to asylum---a status that could also lead to lawful permanent residency. Other types of immigration relief that we will pursue include a U-Visa, T-Visa, family-based petition and/or prosecutorial discretion. In all cases where an immigrant is in removal proceedings, we will defend him or her against removal in the CIC while we seek affirmative immigration relief. In all cases where the status that an individual immigrant is seeking permits it, we will assist individual immigrants in applying for employment authorization.

We expect the additional legal representation for Charlotte immigrants to dramatically change CIC outcomes for these individuals. The CIC is considered one of the harshest in the nation, with 46% of individual respondents ordered to leave the US and more than 80% of asylum cases denied. North Carolina residents have less of a chance of being allowed to remain in the US simply because of where they live. With increased and skilled legal representation for asylum seekers, this project seeks to equalize our local approvals to better match other courts and national statistics.

The dramatic impact that legal representation has on immigration court outcomes is well-documented. According to the Vera Institute of Justice, "only 5 percent of cases that won [in immigration court on a nation-wide basis] between 2007 and 2012 did so without an attorney; 95 percent of successful cases

were represented.” This is not the result of lawyers choosing to represent stronger cases; the impact of representation is substantial even in cases that may initially appear weak.

The New York Immigrant Family Unity Project (NYIFUP), the first publicly funded universal representation program in the nation, demonstrated a significant, causal effect of representation on case outcomes, independent of other factors. Under NYIFUP’s universal representation model, detained immigrants in New York City saw the odds of winning their cases increase from 4 percent when unrepresented to a projected 48 percent with an attorney—a 1,100 percent increase.

Representation makes a fourteen-fold difference in terms of case success for family cases defined as “women with children.”

Communities across the country are seeking ways to defend their residents from detention policies that will continue to result in the removal of immigrant parents, breadwinners, and children unless immigrants have a fighting chance in immigration court. Fifty-two jurisdictions, including Atlanta, Georgia, and Harris County (Houston), Texas, now fund removal defense representation for their foreign-born residents. Many of these cities have brought matching funds from the Vera Institute Safe Cities Initiative to support this work. These funds along with matching support from their city made available to these communities made it possible for them to get their programs off the ground. The City of Charlotte should follow and not allow this opportunity to pass. For immigrants in Charlotte to have an opportunity to defend their case, there must be legal representation in the CIC.

## Overall Agency Budget

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications.*

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$2,591,095	\$3,089,881	\$282,991	\$159,006
Merit	\$0	\$0	\$0	\$0
Benefits	\$794,552	\$955,966	\$86,536	\$51,566
<b>Subtotal Personnel Expenses</b>	<b>\$3,385,647</b>	<b>\$4,045,847</b>	<b>\$369,527</b>	<b>\$210,572</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$94,090	\$104,140	\$11,393	\$5,369
Facilities (e.g. rent, utilities)	\$113,629	\$169,024	\$18,492	8,713
Office Supplies	\$17,034	\$18,000	\$1,969	\$928
Travel & Training	\$13,427	\$30,000	\$3,282	\$1,547
Technology	\$76,899	\$81,500	\$8,916	\$4,201
Other (Please submit document with a breakdown of other)	\$192,819	\$408,166	\$39,422	\$18,670
<b>Subtotal Operating Expenses</b>	<b>\$507,898</b>	<b>\$810,830</b>	<b>\$83,474</b>	<b>\$39,428</b>
<b>Total Expenditures</b>	<b>\$3,893,545</b>	<b>\$4,856,677</b>	<b>\$453,001</b>	<b>\$250,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$700,710	\$700,710
Foundation Grants	\$3,237,676	\$3,237,676
Donor Contributions	\$496,350	\$496,350
Service Fees	\$141,000	\$141,000
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$4,575,736</b>	<b>\$4,575,736</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$408,000
FY 2022 Current Budget	\$408,000
FY 2023 Projected (as requesting)	\$408,000

## Overall Program Budget

	Expenditures FY 2021-FY 2023			
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$262,010	\$273,281	\$282,991	\$159,006
Merit	\$0	\$0	\$0	\$0
Benefits	\$76,512	\$81,929	\$86,536	\$51,566
<b>Subtotal Personnel Expenses</b>	<b>\$338,522</b>	<b>\$355,210</b>	<b>\$369,527</b>	<b>\$210,572</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$8,719	\$9,289	\$11,393	\$5,369
Facilities (e.g. rent, utilities)	\$14,989	\$15,343	\$18,492	\$8,713
Office Supplies	\$2,413	\$2,219	\$1,969	\$928
Travel & Training	\$4,098	\$4,482	\$3,282	\$1,547
Technology	\$8,309	\$8,516	\$8,916	\$4,201
Other (Please submit document with a breakdown of other)	\$33,121	\$35,900	\$39,422	\$18,670
<b>Subtotal Operating Expenses</b>	<b>\$71,649</b>	<b>\$75,749</b>	<b>\$83,474</b>	<b>\$39,428</b>
<b>Total Expenditures</b>	<b>\$410,171</b>	<b>\$430,959</b>	<b>\$453,001</b>	<b>\$250,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$0	\$0
Foundation Grants	\$453,000	\$453,000
Donor Contributions	\$30,000	\$30,000
Service Fees	\$10,000	\$10,000
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$493,000</b>	<b>\$493,000</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$198,000
FY 2022 Current Budget	\$198,000
FY 2023 Projected (as requesting)	\$198,000

## Current Board of Directors

Mr. John Grupp,  
President

Mr. Edward O'Keefe,  
Treasurer

Ms. Lisa Miller,  
Executive Committee Member

Mr. Alex Castle

Mr. Robert A. Cox, Jr.

Mr. Nicholas Harris

Ms. Georgia Krueger

Mr. Luther T. Moore

Ms. Erica Nesmith

Ms. Alexandra Villarreal O'Rourke

Mr. José Vega,  
Vice President

Ms. Carolyn Allison,  
Executive Committee Member

Ms. Lisa Howell,  
Immediate Past President

Mr. Steven Cohen

Mr. J. Porter Durham, Jr.

Mr. Donald Jonas

Ms. Allie Lin

Ms. Gena Graham Morris

Mr. Matthew Robertson

Mr. Kenneth Schorr, Ex Officio

Ms. Angela Zimmern,  
Secretary

Ms. Gwendolyn Lewis,  
Executive Committee Member

Ms. Julia Burgess

Ms. DeCora Cooper

Ms. Angelica Garnett

Mr. Alan Kronovet

Mr. Andres Lopez

Ms. Elizabeth Murphy

Ms. Julie Christine Spahn

FY 2023 Financial Partner Agency Summary  
Agency Name: **Charlotte Regional Business Alliance**  
*(Current Financial Partner)*

**Mission Statement**

We enthusiastically collaborate to promote and advance the Charlotte region, creating opportunity, economic growth and prosperity for all.

**Agency established**

January 01, 2019

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

12 years

**Population served**

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

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Charlotte Regional Business Alliance		✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A

**Organization Funding Support**

FY 2022 City Funding	FY 2023 City Funding Request	Difference
\$166,553	\$167,322	\$769

*\*FY 2023 City funds requested for Operating Expenditures.*

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

*No information provided by applicant for this section.*

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

*No information provided by applicant for this section.*

## Overall Agency Budget

The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications.

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$3,771,850	\$4,473,042	\$4,696,694	\$0
Merit	\$0	\$106,845	\$112,187	\$0
Benefits	\$823,929	\$1,134,104	\$1,213,491	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$4,595,779</b>	<b>\$5,713,991</b>	<b>\$6,022,372</b>	<b>\$0</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$857,667	\$800,750	\$824,772	\$167,322
Facilities (e.g. rent, utilities)	\$924,177	\$1,040,982	\$1,072,211	\$0
Office Supplies	\$32,746	\$69,434	\$70,128	\$0
Travel & Training	\$158,132	\$308,255	\$312,878	\$0
Technology	\$190,638	\$307,467	\$338,213	\$0
Other (Please submit document with a breakdown of other)	\$803,481	\$1,605,636	\$1,525,354	\$0
<b>Subtotal Operating Expenses</b>	<b>\$2,966,842</b>	<b>\$4,132,524</b>	<b>\$4,143,559</b>	<b>\$167,322</b>
<b>Total Expenditures</b>	<b>\$7,562,622</b>	<b>\$9,846,515</b>	<b>\$10,165,931</b>	<b>\$167,322</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$499,700	\$512,640
Foundation Grants	\$500,000	\$600,000
Donor Contributions	\$8,507,204	\$9,000,000
Service Fees	\$0	\$0
Other Revenue	\$48,683	\$75,000
<b>Total Revenues</b>	<b>\$9,555,587</b>	<b>\$10,187,640</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$164,085
FY 2022 Current Budget	\$166,553
FY 2023 Projected (as requesting)	\$167,322

## Performance Objectives Report

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
- Promote economic opportunity	■ # of new qualified projects generated by the Alliance that are actively seeking a new location	■ 80 (2021 CY Goal); 88 (2022 CY Goal)	83	42
	■ # of site visits to our region by companies and/or their consultants	■ 25 (2021 CY Goal and 2022 CY Goal)	8	4
- Delivery of competitive services – expand tax base and revenues	■ # of projects the Alliance assists with that the Alliance did not source	■ 25 (2021 CY Goal); 35 (2022 CY Goal)	26	13
	■ # of domestic and international outbound visits to leads and projects	■ 126	2	N/A

### Comments/ Explanation:

With the arrival of new leadership, the business recruitment team will be evaluating these performance metrics to enhance reporting in a more structured approach on these figures and look at determining future ones to apply for new objective. For the current metrics in place, here is our current performance.

## Current Board of Directors

Malcomb Coley	Joe Paradise	Derick Close
Carol Lovin	Janet LaBar	Rod Crider
Kieth Cockrell	Clarence Armbrister	Jesse Cureton
Luis Lluberas	Heath Campbell	Kandi Dietemeyer
Dena Diorio	Kathleen Evans	Danielle Frazier
Tom Glick	Geoff Gray	Marcela Hawn
David Head	Reginald Henderson	Donny Hicks
Julie Janson	Pat Jones	Marcus Jones
Dave Katz	David Longo	Daniel Lugo
Karen Mattimore	Scott Millar	Tracy Montross
Christopher Moxley	Alan Sauber	Hunter Shull
Kristerpher J. Smith	Ali Summerville	Mike Tanksley
Jennifer Troyer	Laura Ullrich	Fred Whitfield
Teross Young	Seth Bennett	Kristen Blanchard
Greg Boulanger	Charles Bowman	Robert Browne
Vance Dalton, Jr.	Betty Doster	Lee Fite
Denise Hallett	Joel Hamilton	Ken Haynes
Thomas Hertlein	Doug Irmscher	Fred Klein
Jeff Ledford	Eric Lloyd	Ralph Lopez
Marina Lvovich	Eric Mauntel	Robert McCutcheon
Robert Miller	Laura Moore	Tom Murray
Dianne Neurauter	Dewey Norwood	Kim Phillips
Drew Porcello	Crawford Pounds Jr.	Lindsay Powers
Walter Price	John Reid	Patricia Rodgers
Mike Rizer	Kerr Putney	John Sell
Brooke Senter	Donny Simmons	Brandon Sink
David Smith	Brent Tollison	Greg Walter
Sasha Weintraub	Tammy Whaley	Judy Wishnek
Martha Wegner	Angela Yochem	Bryan Delaney
Steven Fisher	Nancy McNelis	Amanda Pickens Nitto
Kathy Wholley	Tariq Bokhari	Elyse Dashew
George Dunlap	Michael Smith	Laura Yates Clark



FY 2023 Financial Partner Agency Summary  
 Agency Name: **Community Building Initiative**  
*(Current Financial Partner)*

**Mission Statement**

CBI's mission is to give people and organizations the knowledge, skills and courage to fight bias, remove barriers to opportunity, and build a more equitable and just Charlotte-Mecklenburg.

**Agency established**

February 20, 2004

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

16 years

**Population served**

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

Each year CBI directly engages a diverse, cross-sector group of approximately 2400 people connected to more than 40 key cross-sector organizations and groups from across the community. Many are CBI program participants and alumni directly connected to City departments and initiatives. As such, these City representatives are equipped to support the City's priorities and focus areas both internally and externally. People connected to CBI programs from all sectors have the capacity to advance the work of inclusion and equity within the City. They do so in both their personal and professional lives as well as through their interactions and service within the broader community.

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Community Building Initiative		✓	✓	✓	✓	✓	✓	✓	✓	✓	

**Organization Funding Support**

FY 2022 City Funding	FY 2023 City Funding Request	Difference
\$50,000	\$75,000	\$25,000

\*FY 2023 City funds requested for Operating Expenditures.

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

In FY23 CBI will continue to engage, educate and equip individuals, organizations and community partners to advance and increase access, inclusion and equity, thereby supporting the City of Charlotte's overall vision of being a community that opens its arms to a diverse and inclusive community of residents, businesses, and visitors alike; a safe family-oriented city where people work together to help everyone thrive. Specifically, CBI's mission and programs have a direct relationship to the priorities outlined in the focus areas of Safe Communities, Great Neighborhoods and Well-Managed Government.

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

DEVELOPING LEADERS Leadership Development Initiative (LDI) educates and equips a diverse cross-sector group of leaders identified by public, non-profit and for-profit organizations to build more inclusive and equitable organizations that can over time increase inclusion and equity across the broader community. Due to the impact of the COVID-19 pandemic, Class 19 transitioned to a virtual format and the program was extended by four additional months. While Class 19 convened each month, COVID had a disproportionate impact on several organizations in this cohort (healthcare and grocery, in particular). As a result, monthly sessions were shortened to a half-day in order to allow most organizational representatives to continue participating. The transformational intent of the LDI program relies heavily on in-person experiential learning and personal connections; the LDI experience does not translate easily to a virtual platform. Hence, the launch of LDI 20 was delayed until public health guidelines allowed the convening of the program. Even in the face of ongoing uncertainty, CBI's commitment is to provide an impactful experience that honors the investments of time and money that each organization is making in LDI while keeping everyone safe and maintaining the integrity of the LDI program. We intend to recruit LDI Class 21 before the end of FY22 and launch it in early FY23. As part of CBI's ongoing commitment to its LDI partner organizations, CBI will work with the City's LDI alumni – along with those in other key LDI organizations – to support them to continue to utilize the skills they have gained through CBI. CBI will support the City's internal leadership development efforts to increase inclusion and equity within their areas of influence and to share evidence of impact. One example of this support is use of the City's LDI alumni as moderators for Equity Impact Circles as they are implemented as an employee engagement vehicle by the City's Organizational Development & Learning Department.

Leaders Under 40 (LU40) connects a diverse, cross-sector group of emerging and established leaders to increase their commitment and capacity to take a more active role in issues that impact Charlotte's present and future. Due to COVID restrictions, Class 10 was fully virtual, although public health guidelines eventually allowed for an in-person graduation session. LU40 Class 11 is currently underway, bringing the total number of LU40 participants/alumni to over 500. Class 12 will be recruited and launched in late FY22/early FY23. CBI is committed to engaging individuals from additional City departments to increase the network of LU40 leaders that work within and serve the City.

CONNECTING COMMUNITY Community Bus Tours Since 2011 CBI has been using its bus tour program as a real-time interactive engagement offering. CBI Bus Tours explore how race and ethnicity have impacted key decisions in economic growth and neighborhood development, as well as "what's in the ground" as a result of these decisions and how these decisions are impacting our community's present and future. The Bus Tours function as civic engagement laboratories that allow participants to explore how issues of inclusion and equity are playing out in Charlotte and elevate the importance of equitable place-making. CBI Bus Tours increase understanding of the city's history and raise awareness about

current challenges and opportunities in creating vibrant and diverse neighborhoods and incorporate the City's Quality of Life data to stimulate response. CBI's Bus Tours are being utilized within City departments to educate and equip people who are providing essential services within our increasingly diverse and changing community. In FY22, the City's ODL department, Charlotte Water, CDOT and others used CBI's Bus Tours as a part of new employee orientation and ongoing employee education and engagement. We anticipate that opportunities to utilize CBI Bus Tours for engagement and learning within the City will continue in FY23. Because the pandemic prohibited in-person Bus Tours, CBI worked with its tour guide and community historian to develop a comparable virtual experience. The Bus Tour program has been delivered in this virtual format for past 18 months, but it is returning to in-person tours as health and safety guidelines permit.

**Dialogues & Conversations** CBI has expertise in organizing and offering community-wide dialogues and facilitated conversations around critical and relevant community issues. CBI typically partners with the Community Relations Committee in these offerings, and our conversation model continues to be adapted for a variety of audiences and issues even with City staff and within City departments. In FY23 CBI is poised to offer this engagement model as requested and as circumstances warrant, especially given that the model has been easily adapted to a virtual format.

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

Since its founding as the Community Building Task Force in 1997, CBI has served as a trusted and effective resource for the City of Charlotte, along with many other organizations at work across the City to increase inclusion and equity. As the Mayor's Racial Equity Initiative is launched and begins its important work, CBI expects and is ready to be engaged in and support this intentional focus within the City's work as the overall initiative takes shape and is developed. We are prepared to make our effective and proven models and programs available and to leverage CBI's rich and diverse cadre of program alumni and leaders in support of the work of the Mayor's Racial Equity Initiative. CBI requests increased funding so that we can step up and step in to support the City, its financial partners and other organizations.

**Overall Agency Budget**

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications.*

	Expenditures FY 2021-FY 2023			
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$317,365	\$317,160	\$317,840	\$0
Merit	\$0	\$0	\$0	\$0
Benefits	\$86,333	\$87,340	\$87,660	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$403,698</b>	<b>\$404,500</b>	<b>\$405,500</b>	<b>\$0</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$2,500	\$2,500	\$0
Communications (e.g. publishing, marketing)	\$41,644	\$45,000	\$45,000	\$6,900

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
Facilities (e.g. rent, utilities)	\$37,319	\$43,000	\$43,000	\$6,150
Office Supplies	\$21,308	\$22,000	\$22,000	\$3,300
Travel & Training	\$0	\$0	\$0	\$0
Technology	\$6,433	\$5,000	\$5,000	\$1,000
Other (Please submit document with a breakdown of other)	\$150,144	\$258,000	\$257,000	\$57,650
<b>Subtotal Operating Expenses</b>	<b>\$256,848</b>	<b>\$375,500</b>	<b>\$374,500</b>	<b>\$75,000</b>
<b>Total Expenditures</b>	<b>\$660,546</b>	<b>\$780,000</b>	<b>\$780,000</b>	<b>\$75,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$0	\$0
Foundation Grants	\$35,000	\$35,000
Donor Contributions	\$515,000	\$515,000
Service Fees	\$130,000	\$130,000
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$680,000</b>	<b>\$680,000</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$27,500
FY 2022 Current Budget	\$50,000
FY 2023 Projected (as requesting)	\$50,000

## Performance Reporting

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Equip senior staff and board members from public, non-profit and for-profit organizations to become more skilled in influencing for inclusion and equity within their organizations and to establish solid connections that can be leveraged to positively impact the City's quality of life.	<ul style="list-style-type: none"> <li>Percentage of LDI participants who rate LDI's effectiveness in increasing their ability to influence for inclusion &amp; equity as <i>good or excellent</i></li> </ul>	94%  See Note #1	80%	See Note #1
	<ul style="list-style-type: none"> <li>Percentage of LDI organizations surveyed which indicate that LDI has impacted the way they operate related to inclusion and equity</li> </ul>	See Note #2	75%	See Note #2

**Comments/Explanation:**

**NOTE #1:** Class 20 held virtual gatherings in February, May and July, and then officially launched its monthly sessions on August 31. City representatives for Class 20 are Liz Babson and Reginald Johnson and CMPD's Luke Sell and Alex Watson. Class 20 also includes two organizations new to LDI: OurBRIDGE for Kids and Sustain Charlotte.

The transformational intent of the LDI program relies heavily on in-person experiential learning and personal connections; the experience does not translate easily to a virtual platform. CBI's commitment is to provide an impactful experience that honors the investments of time and money that each organization is making in LDI while keeping everyone safe and maintaining the integrity of the LDI program. Given the resurgence of the pandemic, we are closely monitoring health and safety guidelines and will make decisions accordingly. LDI Class 20 is currently set to conclude in July 2022, and a program evaluation will be conducted at that time. CBI fully expects to meet this target, and results for this measure will be reported at year end.

**NOTE #2:** The Organizational Influencing Projects (developed by each organization participating in LDI and including an accountability structure for proposed outcomes) for Class 19 were just getting underway when the COVID shut-down occurred. LDI's lead program facilitator made the OI projects the core work for the remaining LDI 19 sessions (April through October 2020). Because this process has carried over into FY22, data about the status of Organizational Influencing Projects to be developed by LDI Class 20 will be rolled into their evaluation and reported at year end.

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Support emerging leaders as advocates for inclusion and equity by increasing their awareness, developing and enhancing their leadership skills and connecting them with one another and community issues as well as with the City's past, present and future, in order to build a robust network of engaged, effective and educated young leaders.	▪ Number of LU40 participants per class	47	45-50	54
	▪ Percentage of LU40 participants who rate their experience as <i>valuable</i> or <i>very valuable</i>	97% See Note #3	80%	See Note #3
	▪ Percentage of LU40 participants who indicate they have increased understanding and skills for addressing community issues	86% See Note #3	80%	See Note #3

**Comments/Explanation:**

**NOTE #3:** Due to the pandemic, the graduation session for Class 9 was delayed until it was safe to meet in person. Graduation sessions for Class 9 and Class 10 were held on September 21 and 22, respectively. LU40 Class 11 began with an orientation on August 26 and launched monthly sessions in September. During the pandemic CBI learned that, unlike its LDI program, LU40 could successfully be adapted to a virtual format, and Class 11 has been meeting virtually with one or two in-person sessions planned as conditions permit. The City of Charlotte is represented in LU40 Class 11 by Anthony Mendez and Beverlee Sanders, and CMPD is represented by David McCallum. Class 11 will conclude in August 2022,

and a program evaluation will be conducted at that time. CBI fully expects to meet targets for these measures, and results for each will be reported at year end.

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Engage a diverse spectrum of residents in real-time opportunities and promote dialogue to build connections across difference and raise awareness, increase understanding and promote action and response to significant community issues.	▪ Number of community engagement offerings	92 See Note #4	20-30	42 See Note #4
	▪ Percentage, on average, of participants and partners in community engagement offerings who rate their experience as <i>valuable</i> or <i>very valuable</i>	See Note #5	75%	See Note #5
	▪ Number of Equity Impact Circle sessions provided	123 See Note #6	16-24	27
	▪ Percentage of EIC participants and organizations/groups who rate their experience as <i>valuable</i> or <i>very valuable</i>	95%	75%	See Note #6

**Comments/Explanation:**

**NOTE #4:** Community engagement offerings during FY22 to date include the following:

**Equity Impact Circles** - UNC-Charlotte Atkins Library Staff (7/7, 7/14) – (This series began in FY21.)  
 - Community EIC in partnership with Charlotte Mecklenburg Library (7/1, 7/8, 7/15, 7/22, 7/29 and 9/2, 9/9, 9/16, 9/23, 9/30)  
 - Crossnore School Cottage Parents (2 groups on 9/8, 9/15, 9/22, 9/29, 10/6)  
 - AvidXChange Staff (11/3, 11/10, 11/17, 12/1, 12/8)

**Fault Lines Dialogue – Now What? Equity in Mental Health and Finding Purpose in a Global Pandemic** (8/30)

**On The Street Community Interviews** – conducted within the community at large to collect input and feedback around the Stakeholders Breakfast theme (10/27, 10/30, 10/31, 11/7)

**Annual Stakeholders Breakfast (Virtual)** – December 3. This year’s event attracted almost 1,000 registrants to connect around the theme *“Reckoning with Aftershocks: How do we recommit, reconnect and rebuild?”*

**Bus Tours** (virtual and in-person) – Atrium Health (7/14 and 10/6)  
 - CREW Charlotte (11/9)  
 - City of Charlotte (CDOT on 9/9; ODL on 11/19)  
 - Smart Start of Mecklenburg County (12/9)  
 - Movement Mortgage employees (8/18)  
 - Inlivan employees (10/12)  
 - Lowe’s employees (10/29)

**Other Community Engagement Offerings** – *Charlotte-Mecklenburg Community Remembrance Project* – collaborative group of organizations working to raise awareness about and install markers to commemorate the lynchings that occurred in Mecklenburg County and promote community-wide acknowledgement and dialogue

**NOTE #5:** Because of the varied nature of these offerings and events, CBI continues to explore a more holistic evaluation strategy that effectively compiles responses from participants in these community offerings. Bus tours are evaluated using an online feedback survey administered to participants after each tour. Responses indicating a *valuable* or *very valuable* experience are consistently in the 85% - 95% range. Dialogues and other offerings are assessed on an individual basis through session feedback forms and/or online surveys. However, due to the challenges presented by the COVID pandemic, in most instances, CBI and/or its community partners have elected not to issue feedback forms or surveys due to the difficulty encountered when trying to get feedback surveys completed/returned. CBI has evaluated the impact of these offerings through its connection with leadership in each of the partner organizations when possible to assess satisfaction and impact.

CBI issued an online survey immediately after its 2021 Stakeholders Breakfast (3% response rate), which indicates 86% of respondents rated their overall experience as *good* or *excellent*. Additional feedback will be reported at year-end.

**NOTE #6:** While CBI has been able to successfully transition its Equity Impact Circles to a fully virtual format, one of the key ongoing challenges has been the lack of response to feedback surveys. Assessment data is largely anecdotal at this time. We continue to re-evaluate how we can collect qualitative feedback in more effective and productive ways moving forward. Additional feedback will be reported at year-end.

## Current Board of Directors

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Eugene Young		

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FY 2023 Financial Partner Agency Summary  
Agency Name: **Greater Enrichment Program**  
*(Current Financial Partner)*

**Mission Statement**

To provide an out-of-school time educational program that is fun and enjoyable for eligible (at risk) school-age (K-8th grade) students and their parents in whom, regardless of their background and abilities, they fully realize their potential for academic achievement, cultural/social enrichment, positive self-esteem, and productive citizenship. Greater Enrichment Program (GEP) has provided afterschool programs in Charlotte-Mecklenburg for more than 46 years. Founded in 1975, GEP remains committed to children by providing free, high-quality afterschool and summer camp programs. GEP's licensed sites have been rated 5 Stars by the NC Division of Early Child Development. By using a holistic and whole child approach, GEP engages participants in a balanced program of academic support, cultural enrichment, and character education. The "GEP Experience" has proved essential in improving the achievements of students enrolled in GEP programs.

**Agency Established**

October 30, 1975

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

30 years

**Population served**

GEP targets schools and neighborhoods of concentrated poverty to host afterschool and summer enrichment programs. GEP aims to address challenges that at-risk families face by providing a program that benefits both students and their families. By using an all-inclusive approach, GEP program offerings address and support the academic, social, and emotional needs of students enrolled.

GEP has served communities with various ethnic and racial backgrounds since its inception. English Language Learners (ELL) populations continue to increase in the Charlotte community, GEP continues to make adaptations to improve support these students.

According to research from the Afterschool Alliance. Afterschool and summer programs in African-American and Latino communities ensure children have access to academically enriching activities. A survey they conducted shows that African American and Latino students' parents are more likely to enroll their children in an afterschool program than the general population. More than 3 in 4 African-American kids and 7 in 10 Latino kids would likely enroll in a summer learning program. They help close the opportunity gap between higher-income and lower-income families and support upward economic mobility..

Information in the American Educator article "The Potential and Promise of Latin American Students" revealed that Latino or ELL students are significantly behind other minority groups in academic achievement and educational attainment. Research suggests that several factors contribute to this including

1. Language Limitation
2. Socioeconomic status
3. Lack of community resources
4. Sense of community

1)Language Spanish is the primary language spoken at home and almost half of all Latino students begin school without being able to speak English. They do not attend preschool or head start and are therefore behind when they begin Kindergarten. According to census data, approximately 80 percent of all English Language Learners (ELLs) in the U.S. are Hispanic. Although schools with high populations of ELL have additional resources, communication is a big challenge. GEP will address this issue with its academic curriculum and communication plan. GEP's academic curriculum has a strong emphasis on literacy and math. To help address ELL learners, there will be a stronger focus on fluency and comprehension. The GEP curriculum coordinator will implement strategies for not only low performing students but students will ELL challenges. GEP will engage academic tutors for small groups and utilizes community partnerships with Charlotte Mecklenburg Library to support students and parents. GEP will also use its large pool of volunteer resources and partnership with Selwyn Presbyterian Church to provide more individualized English support. GEP also has a team of bilingual staff and translators to ensure success.

2)Socioeconomic status Information from the Afterschool Alliance shares that 3 in 5 African American and Latino children are in low-income families. Research from the article in American Educator also suggests that nearly two-thirds of Latino children in America live in poverty. Lower-income households also suffer from food insecurities This holds true to Charlotte Mecklenburg. The most recent data suggest that Charlotte's Latino population falls well below the city poverty level. Due to language limitations and immigrations status, Latino population are hourly workers who earn lower wages. GEP's afterschool and summer camp is free to all participants. It offers all of its programs at no cost including transportation. By targeting high-poverty schools and making the program affordable at no cost, GEP ensures that the families that need it most are eligible to participate.

3)Lack of resources Children that live in poorer neighborhoods in the community have fewer educational, recreational and economic resources. Underprivileged children attend underperforming schools that are in their communities. These neighborhoods are full of crime, drugs, and other social ills. Unemployment, teen pregnancy, and school dropout are higher in these areas as well. These communities often have limited access to healthy foods, jobs, and positive opportunities for upward mobility.

GEP has a large network of community partners and resources. GEP has been in the community for 46 years. It has developed and maintained a network of community partners that support children in under-resourced communities. Through its network, GEP has connected students with a plethora of experiences and opportunities to enrich their lives. GEP students engage in educational, civic, and cultural arts experiences throughout the school year and summer. GEP also serves as social service support by helping parents with housing, food, and social resources. GEP

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Greater Enrichment Program		✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A

## Organization Funding Support

FY 2022 City Funding	FY 2023 City Funding Request	Difference
\$200,000	\$200,000	\$0

*\*FY 2023 City funds requested for Personnel Expenditures.*

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

Afterschool programs are essential to the Charlotte community. The funds from this grant will be used to serve 165 Kindergarten-5th grade students in Charlotte/ Mecklenburg County. The program offerings will be provided to students that attend Merry Oaks International Academy, Niner University Elementary, and Ashley Park Elementary School. GEP currently partners with these schools to provide academic enrichment and summer camp programs.

## Overall Agency Budget

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications.*

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$575,271	\$726,353	\$669,136	\$185,787
Merit	\$0	\$0	\$0	\$0
Benefits	\$90,829	\$118,068	\$112,836	\$14,213
<b>Subtotal Personnel Expenses</b>	<b>\$666,100</b>	<b>\$844,421</b>	<b>\$781,972</b>	<b>\$200,000</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$2,800	\$2,800	\$2,800	\$0
Facilities (e.g. rent, utilities)	\$23,425	\$24,300	\$23,000	\$0
Office Supplies	\$27,153	\$23,610	\$24,500	\$0
Travel & Training	\$5,158	\$5,500	\$5,500	\$0
Technology	\$24,669	\$27,920	\$26,300	\$0
Other (Please submit document with a breakdown of other)	\$146,175	\$143,209	\$142,243	\$0
<b>Subtotal Operating Expenses</b>	<b>\$229,380</b>	<b>\$227,339</b>	<b>\$224,343</b>	<b>\$0</b>
<b>Total Expenditures</b>	<b>\$895,480</b>	<b>\$1,071,760</b>	<b>\$1,006,315</b>	<b>\$200,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$499,057	\$346,639
Foundation Grants	\$2,000	\$25,000
Donor Contributions	\$344,614	\$434,676
Service Fees	\$0	\$0
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$845,671</b>	<b>\$806,315</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Overall Program Budget

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$230,108	\$267,281	\$246,227	\$185,787
Merit	\$0	\$0	\$0	\$0
Benefits	\$36,332	\$43,446	\$40,024	\$14,213
<b>Subtotal Personnel Expenses</b>	<b>\$266,440</b>	<b>\$310,727</b>	<b>\$286,251</b>	<b>\$200,000</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$1,120	\$1,120	\$1,120	\$0
Facilities (e.g. rent, utilities)	\$9,370	\$9,720	\$9,200	\$0
Office Supplies	\$10,861	\$9,444	\$9,800	\$0
Travel & Training	\$2,063	\$2,200	\$2,200	\$0
Technology	\$9,868	\$11,168	\$10,520	\$0
Other (Please submit document with a breakdown of other)	\$58,470	\$57,284	\$56,897	\$0
<b>Subtotal Operating Expenses</b>	<b>\$91,752</b>	<b>\$90,936</b>	<b>\$89,737</b>	<b>\$0</b>
<b>Total Expenditures</b>	<b>\$358,192</b>	<b>\$401,663</b>	<b>\$375,988</b>	<b>\$200,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$0	\$0
Foundation Grants	\$2,000	\$10,000
Donor Contributions	\$170,000	\$165,988
Service Fees	\$0	\$0
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$172,000</b>	<b>\$175,988</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Performance Objectives Report

Goal	Measure	FY2022 Target	Year-End FY2021	Mid-Year FY2022
To promote self-sufficiency by providing specialized enrichment education to school-age children along with a variety of community awareness, crime prevention, cultural, social, and recreational activities designed to strengthen the basic academic and social skills of the youth and prepare them to make a positive contribution to society.	Number of students served who are at 80% or less AMI (Area Median Income)	167	98	122

## Current Board of Directors

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Rennie Cuthbertson  
Charlie Davidson  
Mike Griffin  
Austin Helms  
David Lavoie  
Marty McCarthy  
Alex Salgado

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## FY 2023 Financial Partner Agency Summary

Agency Name: **Mental Health of America of Central Carolinas**

*(New Funding Request)*

### **Mission Statement**

Mental Health America of Central Carolinas is dedicated to providing help, offering hope and promoting mental wellness through advocacy, education and prevention.

### **Agency established**

June 10, 1988

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

First time applicant

### **Population served**

MHA serves both Mecklenburg and Cabarrus counties; however, for the purposes of this grant, outreach and education efforts will be focused on the City of Charlotte residents only. Through a variety of programs and services packaged in the Emotional Toolbox for Building Resilient Communities, both youth and adult target populations will be reached. Because mental illness does not discriminate, MHA serves all individuals in Charlotte and Mecklenburg County regardless of socio-economic or demographic status. Nonetheless, a strong emphasis is placed on reaching the city's most vulnerable and marginalized community members who face multiple barriers to mental healthcare, including stigma, cost, lack of health insurance, and race. This is accomplished by building and maintaining partnerships with key community leaders in targeted high-risk communities such as Crossroads CDC/Grier Heights, UCITY Family Zone, Mecklenburg County's Village HeartBEAT, and now Freedom Communities which serves the Freedom Drive Corridor on Charlotte's westside.

Mecklenburg is the most populated county in North Carolina, being highly segregated by race as typified by Charlotte-Mecklenburg's well-known "crescent and wedge" neighborhood pattern of race and socio-economic status. Data from the Mecklenburg County Community Health Assessment (2019, latest available) show the following demographics about the county's population, each of which play a role, singularly or collectively, in the state of mental wellness in the community:

- Race/ethnicity: 47% White, 31% Black and 13% Hispanic.
- Sex: 52% female and 48% male. • Persons living in poverty: 11.7%.
- Persons under 18 years old (approximately 50% of lifetime cases of mental illness begin by age 14): 23.3%.
- Persons under age 65 without health insurance: 13%.

In comparison to county demographics, the following data provide a snapshot of the socio-economic characteristics of people served by MHA in Mecklenburg County in FY210 (from July 1, 2020 to June 30, 2021):

For MHA's ParentVOICE program, self-reported data show that the following were reached in FY21:

- Age: 19% ages 0-22 years; 42% ages 23-44 years; 30% ages 45-59 years; 8% ages 60-74 years; 1% ages 70 years and over.

- Gender: 81% female; 19% male; 0.05% trans male.
- Ethnicity: 45% African American; 41% Caucasian; 9% Hispanic/Latino; 4% multi-ethnic; 1% Asian.
- Household income: over 47% fell in the income range of \$15,000 to \$74,999, with 24% reporting an income of \$14,999 or less.

For MHA's Education and Awareness programs, self-reported data show that the following were reached in FY21:

- Age: 7% ages 0-19 years; 46% ages 20-44 years; 33% ages 45-59 years; 9% ages 60-74 years; 2% ages 70 years and over; 3% unknown.
- Gender: 84% female; 14.75% male; 0.25% non-binary.
- Ethnicity: 46% Caucasian; 37% African American; 7% multi-ethnic; 6% Hispanic/Latino; 4% Asian.
- Household income: 30% fell in the income range of \$74,999 or less, with 20% identified as students. Age: 11.9% ages 10-19 years; 17.7% ages 20-34 years; 26.3% ages 35-54 years; 7.4% ages 55 years and over; and 36.7% no response.
- Gender: 47.4% female; 50.6% male; 0.07% other; 1.9% not determined or no response.
- Ethnicity: 49.6% Caucasian; 29.5% African American; 6.5% Hispanic/Latino; 3.8% multi-ethnic; 2.4% Asian; 0.7% American Indian; and 7.5% other, unknown or no response.
- Household income: nearly 37% fell in the income range of \$74,999 or less, with 19.7% identified as students.

Many clients and program participants served by MHA come as referrals from community agencies. For ParentVOICE, referrals are often through Youth Recovery Court, District Court, Charlotte-Mecklenburg Schools, and Mecklenburg Youth and Family Services Division. Compeer receives referrals from local mental healthcare providers who believe their clients could benefit from companionship. For education programs, participants typically find information on MHA's website and through community engagement activities such as health fairs or workshops at schools, workplaces, or faith communities. MHA also provides trainings through its trainers' collaborative for large groups, such as school personnel, law enforcement and public safety.

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Mental Health America of Central Carolinas		✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A

### Organization Funding Support

FY 2022 City Funding	FY 2023 City Funding Request	Difference
N/A	\$50,000	\$50,000

*\*FY 2023 City funds requested for Personnel Expenditures.*

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

MHA is requesting funding to support staff costs tied to MHA programs and services. Most programs and services



offered in MHA's Emotional Toolbox for Building Resilient Communities are long-standing, evidence-based programs. Because program delivery is provided by certified professionals having lived experience with mental health challenges, programs are especially effective, with evaluations showing up to 90% of participants gain skills/knowledge and modify attitudes/perceptions. In alignment with public health mandates for COVID-19, programs and services will continue to be modified to address the health and safety needs of MHA's staff and clients/participants as required, offering the same level of compassion and care as afforded with in-person programming.

To ensure success, several strategies will be employed to best reach targeted communities, including: (1) virtual emotional toolboxes; (2) targeted neighborhood outreach; (3) collaborative relationships; and (4) educational programs.

1. Virtual Emotional Toolboxes - MHA launched its virtual emotional toolboxes in October 2021 to supplement its "boots on the ground" approach to the Emotional Toolbox for Building Resilient Communities. The virtual emotional toolboxes are part of MHA's new and improved website, which is all-at-once colorful, engaging, and user-friendly. The virtual emotional toolboxes are the foundation of the Emotional Toolbox for Building Resilient Communities, providing specific and targeted mental wellness resources and tools for the following groups: parents/caregivers; LGBTQ+; persons of color; Latino/Hispanic; business owners/managers; faith leaders; and general community members. MHA programs and services, local and national resources, and recommended readings are organized by group making access to information easy and confidential.
2. Targeted Neighborhood Outreach - Understanding that there is no "one size fits all" approach and that change must be embraced at the individual, family and community levels, MHA works to build relationships with key community stakeholders of high-risk communities in targeted zip codes – those "crescent" communities where programs, resources and services are most lacking. Building strong partnerships is critical to reaching the most vulnerable and marginalized residents of the county. To date, MHA partners with Crossroads CDC/Grier Heights, UCITY Family Zone, Mecklenburg County's Village HeartBEAT, and, most recently, Freedom Communities which serves the Freedom Drive Corridor on Charlotte's westside and the One Charlotte Initiative.
3. Collaborative Relationships  
Mecklenburg County Mental Health Trainer's Collaborative
  - MHA continues to convene area Mental Health First Aid and QPR (Question, Persuade, and Refer) Suicide Prevention Trainers through the Mecklenburg/Cabarrus County Trainer's Collaborative. This has been critical during the pandemic, as MHA has been a leader in providing online mental health education. MHA has been able to work with the collaborative on getting other trainers up to speed on new curriculum through the National Council for Mental Wellbeing and the QPR Institute.

#### Mecklenburg County Public Health Department / Village HeartBEAT

- MHA has been working closely with Village HeartBEAT and the Mecklenburg County Public Health Department to provide Mental Health Navigators within houses of worship with the appropriate mental health trainings, such as Mental Health First Aid and QPR, so they may better support and serve congregants.

Valerie Woodard Community Resource Center

- MHA has placed a part-time Family Partner at this location two days per week beginning October 25, 2021 to provide more timely family support through the ParentVOICE program. In addition, referrals are made to Compeer, as appropriate, and community members are encouraged to avail themselves of free MHA educational opportunities. ParentVOICE support groups, Mental Health First Aid, and QPR trainings will be held at the center when in-person events are allowable.

Charlotte-Mecklenburg Schools

- In 2021, MHA deepened its partnership with CMS in response to increased mental health concerns for youth, including increased suicidal ideation and suicide attempts. By year-end, MHA will have provided QPR Suicide Prevention Train-the-Trainer classes for nearly 75 school personnel in 11 high schools. MHA will work with these certified instructors to train up to 7,500 9th graders in CMS in QPR suicide prevention strategies by the end of the 2021-2022 school year.

## Overall Agency Budget

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications.*

	Expenditures FY 2021-FY 2023			
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$611,796	\$652,242	\$786,723	\$40,000
Merit	\$0	\$0	\$0	\$0
Benefits	\$119,541	\$175,232	\$184,142	\$10,000
<b>Subtotal Personnel Expenses</b>	<b>\$731,337</b>	<b>\$827,474</b>	<b>\$970,865</b>	<b>\$50,000</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$0	\$12,000	\$12,000	\$0
Facilities (e.g. rent, utilities)	\$41,568	\$41,000	\$41,000	\$0
Office Supplies	\$9,301	12,100	\$12,100	\$0
Travel & Training	\$49,203	\$27,000	\$27,000	\$0
Technology	\$68,217	\$44,000	\$46,000	\$0
Other (Please submit document with a breakdown of other)	\$268,489	\$355,400	\$347,500	\$0
<b>Subtotal Operating Expenses</b>	<b>\$436,778</b>	<b>\$491,500</b>	<b>\$485,600</b>	<b>\$0</b>
<b>Total Expenditures</b>	<b>\$1,168,115</b>	<b>\$1,318,974</b>	<b>\$1,456,465</b>	<b>\$50,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$0	\$0
Foundation Grants	\$235,000	\$225,000
Donor Contributions	\$170,000	\$200,000
Service Fees	\$25,500	\$24,000
Other Revenue	\$222,294	\$188,455
<b>Total Revenues</b>	<b>\$652,794</b>	<b>\$637,455</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$508,332
FY 2022 Current Budget	\$640,239
FY 2023 Projected (as requesting)	\$720,231

## Overall Program Budget

	Expenditures FY 2021-FY 2023			
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$407,737	\$448,567	\$501,781	\$40,000
Merit	\$0	\$0	\$0	\$0
Benefits	\$76,732	\$123,842	\$141,938	\$10,000
<b>Subtotal Personnel Expenses</b>	<b>\$484,469</b>	<b>\$572,409</b>	<b>\$643,719</b>	<b>\$50,000</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$0	\$0	\$0	\$0
Facilities (e.g. rent, utilities)	\$30,064	\$27,500	\$27,500	\$0
Office Supplies	\$7,421	\$10,300	\$10,300	\$0
Travel & Training	\$19,239	\$17,600	\$18,000	\$0
Technology	\$47,276	\$31,000	\$32,000	\$0
Other (Please submit document with a breakdown of other)	\$102,557	\$140,936	\$141,000	\$0
<b>Subtotal Operating Expenses</b>	<b>\$206,557</b>	<b>\$227,336</b>	<b>\$228,800</b>	<b>\$0</b>
<b>Total Expenditures</b>	<b>\$691,026</b>	<b>\$799,745</b>	<b>\$872,519</b>	<b>\$50,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$0	\$50,000
Foundation Grants	\$105,000	\$110,000
Donor Contributions	\$74,506	\$72,288
Service Fees	\$20,000	\$30,000
Other Revenue	\$119,126	\$50,000
<b>Total Revenues</b>	<b>\$318,632</b>	<b>\$312,288</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$425,131
FY 2022 Current Budget	\$481,113
FY 2023 Projected (as requesting)	\$560,231

## Current Board of Directors

Heather McCullough

Tiffany Morgan

Marcella Beam

Mark Brumfield

Seth Harward

Logan McCloy

Captain Christian Wagner

Tim Beyer

Rob Jones

Mary Ellen Ezarsky

Andrea Gardin

Jennifer Chesser

Kelli Raulerson

John Cheek

Lisa Murray Adams

Claude Ellis Forehand II

Jessica Castrodale

Joseph Machicote

Yuly Rodriquez

## FY 2023 Financial Partner Agency Summary

Agency Name: **My Brother's Keeper Charlotte Mecklenburg County**

*(Current Financial Partner)*

### Mission Statement

My Brother's Keeper Charlotte-Mecklenburg (MBK-CLT MECK) is committed to improving outcomes for boys and young men of color by serving as the backbone organization of a collective impact effort.

### Agency established

February 18, 2020

### Total years financial partner with City of Charlotte

3 years

### Population served

MBK-CLT MECK's target population is BYMOC ages 6-24. In particular, our MBK Vanguard program will target BYMOC ages 6-18. This will be key to increasing economic mobility but also addressing the devastating effects of the COVID-19 pandemic on our youth. According to data from Charlotte Mecklenburg Schools (CMS), the failure rate in English rose from 8% to 22% for Black students, and the failure rate for Math rose from 10% to 20%. And, nearly 49% of Black boys/ 43% of Latino boys at the lowest-rated high schools have not attended school at all this during the 2020-21 school year (CMS, 2021).

The Fatherhood Institute targets young fathers of color ages 18-24 in Mecklenburg County. The National Fatherhood Initiative reports low-income, non-residential fathers report unemployment, inability to pay child support, and inability to buy things for their child as their top challenges. Referrals will be provided by community partners, DSS, and Child Support Enforcement.

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
My Brother's Keeper CLT-Mecklenburg		✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A

### Organization Funding Support

FY 2022 City Funding	FY 2023 City Funding Request	Difference
\$50,000	\$90,000	\$40,000

*\*FY 2023 City funds requested for Personnel Expenditures.*

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

The requested funding will support the overall MBK CLT MECK activities. The MBK Vanguard Program and the Fatherhood Institute utilize mentorship and increasing social capital to support BYMOC.

Activities for the MBK Vanguard include:

Recruiting and training male mentors from the community and matching them with BYMOC. Mentor and mentees have one-on-one meetings, regular check-ins, and enrichment activities to set educational and personal goals.

Mentees will take pre and post Hello Insights assessments to determine their social-emotional needs and growth. Mentees will register on the Gradify platform which provides access to targeted college and career pathways, virtual college tours, and career speakers.

The MBK Fatherhood Institute activities include Fathers will take an evidence-based 6-week course focused on developing actively involved fathers through increased knowledge of child development and health, co-parenting, social/emotional management as well as father-focused skill-building including bathing, changing diapers, and CPR. Fathers will work with mentors to develop personal, educational, and career goals.

The mentor will have regular ongoing meetings with the fathers to assess their progress on goals and offer advice and support.

Fathers will be connected to resources for job training and workforce development programs, post-secondary education.

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

*No information provided by applicant for this section.*

**Overall Agency Budget**

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications.*

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$103,002	\$118,002	\$163,002	\$75,000
Merit	\$0	\$11,250	\$12,500	\$0
Benefits	\$21,710	\$27,140	\$37,490	\$15,000
<b>Subtotal Personnel Expenses</b>	<b>\$124,712</b>	<b>\$156,392</b>	<b>\$212,992</b>	<b>\$90,000</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$0	\$0	\$0	\$0
Facilities (e.g. rent, utilities)	\$0	\$0	\$0	\$0
Office Supplies	\$0	\$0	\$0	\$0
Travel & Training	\$0	\$0	\$0	\$0
Technology	\$0	\$6,000	\$6,000	\$0
Other (Please submit document with a breakdown of other)	\$155,305	\$167,608	\$161,008	\$0
<b>Subtotal Operating Expenses</b>	<b>\$155,305</b>	<b>\$173,608</b>	<b>\$167,008</b>	<b>\$0</b>
<b>Total Expenditures</b>	<b>\$280,017</b>	<b>\$330,000</b>	<b>\$380,000</b>	<b>\$90,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$0	\$0
Foundation Grants	\$175,000	\$225,000
Donor Contributions	\$30,000	\$30,000
Service Fees	\$0	\$0
Other Revenue	\$25,000	\$25,000
<b>Total Revenues</b>	<b>\$230,000</b>	<b>\$280,000</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$50,000
FY 2022 Current Budget	\$50,000
FY 2023 Projected (as requesting)	\$50,000

## Performance Objectives Report

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Engage additional 150 young men of color	<ul style="list-style-type: none"> <li>Number of young men engaged</li> </ul>	<ul style="list-style-type: none"> <li>Additional 150 young men</li> </ul>	285 young men engaged/served	we engaged an additional 135 young men bring our total engagement to 420
Have additional take emotional assessment and activate a profile on our college and career platform	<ul style="list-style-type: none"> <li>Number of young men who have taken assessment</li> <li>Number of young men that have activated profiles</li> </ul>	<ul style="list-style-type: none"> <li>Additional 150 young men have taken the social-emotional assessment and activated profiles on the MBK's college and career platform.</li> </ul>	285 young men took social emotional assessment and 92 young with profiles on College and career platform	The additional 135 are in the process of taking Assessment and building profiles on college & Career platform

### Comments/ Explanation:

Our goal is to have impacted/engaged/served young men of color at all 33 High schools in CMS.

## Current Board of Directors

Michael DeVaul  
Jorge Millares  
Mark Jerrell  
Raki McGregor  
Jason Terrell  
Braxton Winston

Reginald Bean  
Kevin Henry  
Kenston Griffin  
James Mitchell  
Todd Tibbits  
Keith Cockrell

Kenneth Burton  
Frank Barnes  
Eric Lewis  
Teddy McDaniel  
Anthony Trotman

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FY 2023 Financial Partner Agency Summary

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

**Mission Statement**

The Mission of the National Institute of Minority Economic Development is To Strengthen the Asset Base of Diverse Populations Through Policy, Education and Economic Opportunities. We do this in alignment with our value systems Trust, Excellence, Innovation, and Collaboration. The Mission of the Women's Business Center of Charlotte is to promote economic self-sufficiency through entrepreneurship for ALL Women in the Charlotte North Carolina Region with OPPORTUNITIES that help women entrepreneurs achieve business goals by providing "In-depth – substantive out-come oriented business services". The services are designed to ensure program success across the spectrum of the 12 county regions to enhance economic empowerment for Women-Owned and Minority- Owned Businesses.

**Agency established**

May 01, 2017

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

5 years

**Population served**

The Women's Business Center of Charlotte is one of the economic development programs of the National Institute for Minority Economic Development, and serves the Charlotte MSA.

The WBCC's clients and core competencies are to serve woman entrepreneurs. The clients range in the age groups of 25yrs - 65yrs. 6% are Pre-venture clients (not in business), 34% are Start-up clients (3yr 1 >10 employees). Our clients are 85% African American; 12% White, 2% Asian and 1% other. Many of our clients are in professional services (consultant, management) 10% are in construction, 20% are in other services, and 10%-12% in Retail Trade. For those who have started the business 144 or 44% avg being in business 4 to 5 years and approximately 26% of our clients' annual sales are \$0 - \$250,000. The profile of our client is wide, as we serve women of color in low to medium income areas with a desire of turning their skills and abilities into a family supporting venture. Other clients are professionals with some level of college or a Masters' Degree. Her desire is to transition from corporate America to entrepreneurship, and her salary ranges from \$35K - \$120K.

The WBCC services clients in Alexander, Anson, Cabarrus, Catawba, Cleveland, Gaston, Iredell, Lincolnton, Mecklenburg, Rowan, Stanly, and Union Counties. Due to the area's density, a large percentage of our clients are in the Charlotte area.

Our clients desperately seek assistance in various aspects of their business. Our skills and capability to develop sound business plans, or helping to identify market share are great tools that create confidence in business ownership and increases opportunities for future growth.

In FY2021 (10/2020 – 09/2021), WBCC provided virtual one-on-one counseling services to 139 unique clients with over 310 total contact and prep hours. Held 92 successful virtual training/events offering 426 training hours. We supported 28 new business starts. Our established businesses reported a sales growth of \$77K, \$641K in access to capital and are employing 1.5K full-time/part-time employees. 90% of our clients have less than 15 employees.

**OPPORTUNITIES:** As the Charlotte region grows and the business landscape changes, the WBCC has identified a need to increase its outreach to low to medium income women of color that speak English as a second language. Most of this population is centered around the City of Charlotte's 5 Corridors of Opportunities. The negative impact of COVID-19 on small businesses made it evident that many women entrepreneurs in the migrant communities were left behind as critical information and resources were not quickly made available in language. The WBCC wants to develop into a platform of connectivity among BIPOC (Black, Indigenous People of Color) and specifically women. Our intention is to identify facilitators from a pool of bilingual professional women and bilingual women with established and successful businesses, develop a "Train-the-Trainer" program, so that we can jointly offer financial literacy and business education in language to aspiring entrepreneurs. We want to help demystify US business practices and financial and taxing responsibilities. This initiative will support the facilitators as they are minority women business owners.

Through the City of Charlotte's support, the WBCC will increase its outreach to the migrant business community to facilitate access to capital, and access to public & private small business resources.

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
National Institute of Minority Economic Development – The Women's Business Center of Charlotte		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

## Organization Funding Support

FY 2022 City Funding	FY 2023 City Funding Request	Difference
\$50,000	\$50,000	\$0

*\*FY 2023 City funds requested for Personnel and Operating Expenditures.*

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

According to a survey conducted by Cox Business - several reasons why employees believe that starting a small business is right for them, is because entrepreneurs want to be more hands on, they want more money and independence, they want to work for themselves to create generational wealth, and because they started a hobby that they want to become lucrative. Research shows that 42% of small businesses fail because of no market need, 23% because of not having the right team, 29% ran out of cash (no budget experience) and 18% lack pricing and cost structure knowledge.

WBCC offers a robust series of workshops and ongoing educational business programs to ensure entrepreneurs have a strong business foundation. WBCC's counseling team works with business owners offering one-on-one customized counseling sessions designed to enhance the entrepreneurs / business owner's knowledge of managing a business, onboarding a team, overcoming financial challenges, creating budgets, building a business plan and more. We work with businesses to point them in the right direction of resources and support. We teach that building relationships with the six key advisors "Bankers, Lawyers, Accountants, Insurance, Financial Advisors, and HR Specialist" will help to build a strong sustainable business foundation.

WBCC activities and programs include:

Procurement assistance. Business counseling. Understanding Healthy Finances - Financial assistance. Surety bonding. Management and technical assistance WOSB/Certification MWSBE / DBE/ VET / Certification Government Contracting SWOT Analysis Access to Capital & Financial Resiliency Understanding Quick Books & Small Business Funding Series Networking Training Financial Bootcamps Leadership & Management Training (Executive Presence)

In response to COVID-19 WBCC evaluated the women of color business owners needs and established programs to fill the gap. We believe these issues are still present and will continue to work towards meeting the current needs of our current and future clients. Some of the recently development offerings are: Catch the Tech Fever; 5 Key Steps to Starting and Designing Your Business; Accessing Capital & Financial Resiliency for Sustainability; Financial Resiliency: Understanding Your Business Tax Structure; B.O.S.S. U.P. Series; Building Your Online Presence; Launch Your Business with Customer-Focused Marketing; Doing Business With the Federal Government; DON'T MISS OUT ~ How to Do Business with City of Charlotte & Mecklenburg County; Enhance & Protect a Key Business Asset: Register Your Trademarks!; Entrepreneur Roadmap to Starting a Business; Let's Talk Withholding Taxes with NCDOR & IRS; PRESS RECORD ~ Navigating the Ins and Outs of Recordkeeping; Smooth Operator: Save Money and Time by Standardizing Your Procedures; Starting a Nonprofit Organization in a Pandemic; Who and Where Are Your Customers?; You Need Help...Need To Hire...But Short On Cash?; Vitality For Surviving in Your Business; Train the Trainer to support bilingual business owners.

Through this in-depth support to women business owners, the WBCC is privileged to obtain highly confidential information. The WBCC wants to increase capacity by creating full-time family sustaining employment opportunities to perform day-to-day operations that may not be assigned to volunteers and student interns.

## Overall Agency Budget

The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$1,393,090	\$2,513,609	\$2,589,017	\$0
Merit	\$0	\$0	\$0	\$0
Benefits	\$219,694	\$615,014	\$633,464	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$1,612,784</b>	<b>\$3,128,623</b>	<b>\$3,222,481</b>	<b>\$0</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$16,626	\$87,500	\$90,125	\$0
Communications (e.g. publishing, marketing)	\$46,858	\$50,000	\$51,500	\$0
Facilities (e.g. rent, utilities)	\$230,345	\$428,669	\$441,529	\$0
Office Supplies	\$54,478	\$52,200	\$53,766	\$0
Travel & Training	\$53,894	\$99,000	\$101,970	\$0
Technology	\$0	\$0	\$0	\$0
Other (Please submit document with a breakdown of other)	\$2,281,428	\$3,049,696	\$3,141,188	\$0
<b>Subtotal Operating Expenses</b>	<b>\$2,683,629</b>	<b>\$3,767,065</b>	<b>\$3,880,078</b>	<b>\$0</b>
<b>Total Expenditures</b>	<b>\$4,296,413</b>	<b>\$6,895,688</b>	<b>\$7,102,559</b>	<b>\$0</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$1,054,591	\$1,086,229
Foundation Grants	\$2,008,275	\$2,068,523
Donor Contributions	\$426,766	\$439,569
Service Fees	\$2,709,520	\$2,790,919
Other Revenue	\$757,140	\$779,854
<b>Total Revenues</b>	<b>\$6,956,292</b>	<b>\$7,165,094</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Overall Program Budget

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$148,194	\$168,253	\$173,300	\$15,000
Merit	\$0	\$0	\$0	\$0
Benefits	\$15,861	\$34,790	\$35,834	\$6,500
<b>Subtotal Personnel Expenses</b>	<b>\$164,055</b>	<b>\$203,043</b>	<b>\$209,134</b>	<b>\$21,500</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$7,883	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$7,065	\$9,572	\$9,859	\$3,000
Facilities (e.g. rent, utilities)	\$15,000	\$36,000	\$37,080	\$18,000
Office Supplies	\$3,227	\$19,700	\$20,291	\$2,500
Travel & Training	\$12,397	\$24,917	\$25,665	\$1,500
Technology	\$0	\$0	\$0	\$0
Other (Please submit document with a breakdown of other)	\$340,942	\$156,730	\$75,000	\$3,500
<b>Subtotal Operating Expenses</b>	<b>\$386,514</b>	<b>\$246,919</b>	<b>\$167,895</b>	<b>\$28,500</b>
<b>Total Expenditures</b>	<b>\$550,569</b>	<b>\$449,962</b>	<b>\$377,029</b>	<b>\$50,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$314,962	\$150,000
Foundation Grants	\$50,000	\$127,029
Donor Contributions	\$0	\$0
Service Fees	\$35,000	\$50,000
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$399,962</b>	<b>\$327,029</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Performance Objectives Report

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Create business owner capacity building programs to enhance entrepreneur opportunity to become economically self-sufficiency	■ Development & Implementation of Four Business Capacity Building Programs	■ 100%	100%	75%
	■ Completion of program			
	○ Game Changer (2020)	○ 80%	87%	N/A
	○ Run-Start-Grow Ready 2 Market (2020)	○ 80%	100%	N/A
	○ Business Funding Series (2021)	○ 100%	100%	N/A
	○ Women of Financial Character	○ 100%	100%	N/A
	○ Women Moving Forward Focus	○ 80%	100%	N/A
	○ Women of Extraordinary Executive Power (2021)	○ 80%	90%	N/A
	○ Supply Chain Center of Excellence (2020-2021)	○ 80%	100%	100%
	○ Game Changer 2021 (Ver 2)	○ 80%	88%	88%
	○ Business Funding Series (2022)	○ 30	N/A	14
	○ Game Changer 2022 (Ver 3)	○ 15	N/A	16
	○ Supply Chain Center of Excellence (2021-2022)	○ 20	20	20
	○ Catch the Tech Fever	○ 10	N/A	20
	■ # of interested participants in training programs from 10 to 15 or 20	■ 90%	100%	85%
	■ client participation rate during training	■ 88%	N/A	90%
	■ Client retention, referral reapply for new programs	■ 45%	40%	35%
	■ Client growth, development & capacity	■ 75%	80%	65%

### Comments/ Explanation:

It is our goal to increase # equitable programs for participants each year by 2%

- Game Changer (2020) kicked off December 2019 and ended December 2020 - FY21
- Run-Start-Grow Ready 2 Market was offered from September – December 2020 - FY21
- Business Funding Series 2021 was offered January – February 2021 and 3<sup>rd</sup> Qtr (Apr – June) FY21
- Game Changer (2021) was offered from January – December 2021 - FY21
- Women of Financial Character was offered March - May 2021 – FY21
- Women Moving Forward & Focus was offered February - May 2021 – FY21
- Women of Extraordinary Executive Power was offered March – May 2021 - FY21
- Game Changer (2022) will run from January - December 2022 - FY22
- Business Funding Series (2022) completed 1<sup>st</sup> Qtr (Nov 2021) and will be offered 3<sup>rd</sup> Qtr (Apr – June 2022) - FY22

New programs for fiscal 2021-2022

- Catch the Tech Fever – February - March 2022
- Strategize to Monetize – March – April 2022

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Provide resources, tools, mentorship, and assistance to M/WSBE & Veteran Entrepreneurs who desire to start, grow, and manage small businesses in the city of Charlotte CSA area -	<ul style="list-style-type: none"> <li>#Businesses Trained &amp; Counseled</li> <li>#Hours Counseled</li> </ul>	<ul style="list-style-type: none"> <li>726</li> <li>150</li> </ul>	1200 310	222 34
2021-2022 Metrics	<ul style="list-style-type: none"> <li>Number of Businesses Served</li> <li>Number of Access to Capital</li> <li>Number of Business Starts</li> </ul>	<ul style="list-style-type: none"> <li>90%</li> <li>23</li> <li>20</li> </ul>	150% 23 28	31% 35 10%

**Comments/ Explanation:**

**It is our goal to offer additional financial literacy training to enhance and increase small businesses' capacity.**

The Small Business Funding Series was offered in 2021-2022 fiscal year beginning in 1<sup>st</sup> quarter. Business owners of Game Changer program were offered various training and knowledge learning opportunities consisting of:

- Basic Financial Management Planning
- Assessing Financial Health of Your Business
- Budgeting & Financial Planning Part #1
- Budgeting & Financial Planning Part #2 Financial Impact of Hiring
- Credit & Capital/Loan & Risk Ready

Note: # of Loan review/approvals is low as we provided technical assistance and referrals for small businesses to apply to NC Retool grant funds.

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Provide resources, tools, mentorship, and assistance to M/WSBE & Veteran Entrepreneurs who desire to start, grow, and manage small businesses in the city of Charlotte CSA area -	<ul style="list-style-type: none"> <li>#Businesses Trained &amp; Counseled</li> <li>#Hours Counseled</li> </ul>	<ul style="list-style-type: none"> <li>726</li> <li>150</li> </ul>	1200 310	222 34
2021-2022 Metrics	<ul style="list-style-type: none"> <li>Number of Businesses Served</li> <li>Number of Access to Capital</li> <li>Number of Business Starts</li> </ul>	<ul style="list-style-type: none"> <li>90%</li> <li>23</li> <li>20</li> </ul>	150% 23 28	31% 35 10%

**Comments/ Explanation:**

It is our goal to meet our SBA requirements for the 12 counties that we service throughout the fiscal period by supporting small business with one-on-one counseling, training sessions and assist with access to capital transactions... Our goal is to have at least 40% of this accomplished by mid-year.

SBA Performance Metric for FY 2022 (October 2021 – September 2022):

- Unique Clients – 726
- New Business Start – 20
- Capital Infusion Transactions - 23

Note: Number of Access to Capital includes small business loans as well as NC Retool grant funds. These access to grants numbers were not included in the initial proposal, as at that time it was unknown there would be another round of grants available.

## **Current Board of Directors**

Nikitra Bailey

Lori Jones Gibbs

Ted Edwards

Sue Malone

Michael Suggs

Karla Haynes

Martin Eakes

Lewis H. Myers

Troy Roberts

Tyrone Baines

Adam Klein

Dr. Edward Fort

Jeanne C. Tedrow



## FY 2023 Financial Partner Agency Summary

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

*(Current Financial Partner)*

### Mission Statement

To provide hope and healing to those impacted by domestic violence and sexual assault.

### Agency established

March 21, 1909

### Total years financial partner with City of Charlotte

40 years

### Population served

Although domestic violence impacts families of all socioeconomic levels, Safe Alliance cares primarily for the most vulnerable in our community. Among all of the victims served in Safe Alliance's programs, more than 97% live below the federal poverty level. At the Domestic Violence Shelter, 96% of Shelter residents live in extreme poverty, with family incomes that are less than \$10,000 annually. These residents comprise the 6% of homeless persons in Mecklenburg County who, according to the most recent Point-in-Time Count Report, cite domestic violence as their primary reason for becoming homeless. The Victim Assistance Court Program (VACP) provides services both for Safe Alliance's shelter residents and for many other victims who are not technically homeless but still cluster near the bottom of the socioeconomic ladder. Among VACP clients, approximately 67% live below \$25,000 per year. With slight fluctuations each year, the major racial/ethnic groups served are African American (50-70%), Caucasian (20-30%) and Latin American (10-20%). The majority of our clients are struggling with multiple issues in addition to domestic or sexual violence such as poverty, community violence, and institutional racism.

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Safe Alliance		✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A

### Organization Funding Support

FY 2022 Funding	FY 2023 Funding Request	Difference
\$397,038	\$406,682	\$9,644

*\*FY 2023 City funds requested for Personnel and Operating Expenditures.*

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

1. VACP staff will assist victims of domestic violence with safety planning including developing a plan to secure needed legal protections.
2. VACP staff will assist victims of domestic violence with filing for DVPOs.
3. VACP staff and volunteers will accompany victims to emergency ex parte hearing (to secure immediate protection while the victim is waiting for their DVPO hearing).
4. VACP staff attorneys will represent clients at the DVPO hearing.
5. VACP staff will help victims prepare for their one-year DVPO renewal hearing.
6. VACP staff attorneys will represent clients at their one-year DVPO renewal hearing.
7. VACP staff attorneys will help victims prepare for Family Court, which makes permanent determinations regarding property and custody.
8. VACP staff will follow up with victims to determine whether safety has increased as a result of VACP assistance.

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

We are requesting flat funding plus a merit allocation for staff salaries.

**Overall Agency Budget**

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications*

	Expenditures FY 2021-FY 2023			
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$3,664,349	\$4,024,257	\$3,961,539	\$321,471
Merit	\$0	\$124,462	\$118,846	\$9,644
Benefits	\$948,700	\$1,093,123	\$1,093,123	\$70,566
<b>Subtotal Personnel Expenses</b>	<b>\$4,613,049</b>	<b>\$5,241,842</b>	<b>\$5,173,508</b>	<b>\$401,682</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$51,717	\$88,643	\$85,000	\$0
Facilities (e.g. rent, utilities)	\$654,744	\$813,369	\$820,000	\$5,000
Office Supplies	\$179,306	\$162,282	\$162,300	\$0
Travel & Training	\$24,971	\$60,500	\$35,000	\$0
Technology	\$171,197	\$162,004	\$175,000	\$0
Other (Please submit document with a breakdown of other)	\$717,114	\$1,023,804	\$1,020,000	\$0
<b>Subtotal Operating Expenses</b>	<b>\$1,799,049</b>	<b>\$2,310,602</b>	<b>\$2,297,300</b>	<b>\$5,000</b>
<b>Total Expenditures</b>	<b>\$6,412,098</b>	<b>\$7,552,444</b>	<b>\$7,470,808</b>	<b>\$406,682</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$4,923,709	\$4,809,310
Foundation Grants	\$786,396	\$750,000
Donor Contributions	\$1,166,000	\$1,200,980
Service Fees	\$6,000	\$10,518
Other Revenue	\$670,339	\$700,000
<b>Total Revenues</b>	<b>\$7,552,444</b>	<b>\$7,470,808</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$1,390,730
FY 2022 Current Budget	\$1,430,560
FY 2023 Projected (as requesting)	\$1,415,210

## Program Budget

	Expenditures FY 2021-FY 2023			
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$657,805	\$691,040	\$651,002	\$321,471
Merit	\$0	\$21,372	\$19,530	\$9,644
Benefits	\$219,635	\$229,023	\$229,023	\$70,566
<b>Subtotal Personnel Expenses</b>	<b>\$877,440</b>	<b>\$941,436</b>	<b>\$899,555</b>	<b>\$401,682</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$9,197	\$15,268	\$16,000	\$0
Facilities (e.g. rent, utilities)	\$6,594	\$14,906	\$5,680	\$5,000
Office Supplies	\$19,043	\$29,518	\$32,150	\$0
Travel & Training	\$3,811	\$10,020	\$10,020	\$0
Technology	\$29,957	\$22,400	\$33,925	\$0
Other (Please submit document with a breakdown of other)	\$39,496	\$41,636	\$56,381	\$0
<b>Subtotal Operating Expenses</b>	<b>\$108,098</b>	<b>\$133,748</b>	<b>\$154,156</b>	<b>\$5,000</b>
<b>Total Expenditures</b>	<b>\$985,538</b>	<b>\$1,075,184</b>	<b>\$1,053,711</b>	<b>\$406,682</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$839,569	\$889,569
Foundation Grants	\$62,500	\$42,500
Donor Contributions	\$0	\$0
Service Fees	\$173,115	\$121,642
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$1,075,184</b>	<b>\$1,053,711</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$1,390,730
FY 2022 Current Budget	\$1,430,560
FY 2023 Projected (as requesting)	\$1,415,210

## Performance Objectives Report

Goal	Measure	Target	Year-End FY21	Mid-Year FY22
Reduce Crime	■ Develop Safety Plans	■ 90% of 4000 victims will develop safety plans	3888	3566
	■ Complete DVPO paperwork	■ 1100 victims will complete protection order paperwork	732	365
	■ Accompany clients to civil and criminal court	■ 4750 victims will be accompanied to court	1348	1685
	■ Positive responses from clients on outreach survey regarding safety	■ 80% of clients will indicate an increase in their Collective Impact personal safety subscale after receiving services	78%	84%

### Comments/ Explanation:

Victim Assistance Court Program (VACP's) resource guide is located in the Mecklenburg County Courthouse, SelfServe Center, Civil Clerk's Office, Magistrate's office, local police departments, and other community agencies in an effort to reach more victims and provide victims easy access to our information for assistance with protection orders. All staff, volunteers, and interns are trained to complete both verbal and written safety plans. Safety plans may be completed verbally with victims who prefer to not have a written safety plan, needs assistance over the phone, or in court. VACP has trained advocates, volunteers, and interns to accompany clients to civil, misdemeanor, and felony court. VACP works with the Domestic Violence and Sexual Assault Units of the District Attorney's office, as well as their Victim Witness assistants, to provide court accompaniment services. VACP has bilingual court advocates to assist Spanish speaking victims in court.

All staff use the Collective Impact Safety Subscale Score to collaborate and assess the impact of our services on the safety of our clients. The scoring is completed in our online database allowing staff to see how clients are affected when utilizing services in other areas of our agency. All clients are scored at their initial meeting with their advocate, at the conclusion of civil and/or criminal court if the client was present or could be reached by phone, and any other time the staff member can assess the client's level of safety.

FY-21 and FY-22 has been a challenging time for everyone due to the COVID-19 pandemic. As we move forward and recognize that this is our "new normal" we are left with new challenges to navigate. While domestic violence is still very prevalent, VACP is not seeing the number of victims seeking services as we did pre-pandemic. Many victims are fearful of leaving their homes due to COVID-19 or are unable to due to the abuser being at home or lack of transportation and money. As an agency, we continue to evaluate our services and service delivery model to ensure we are doing what is best for our clients and those in need. We also make a continued effort to speak about our services at every opportunity and educate the community. All of the education in the world does not remove barriers or victim's inability to reach out and utilize our services.

Mecklenburg County courts have slowly eased restrictions, however, there is a limit on the number of individuals per courtroom to comply with social distancing. These restrictions have had two major impacts to services provided by VACP. The first, is that VACP is now responsible for going to 4 courtrooms instead of the 3 we did pre-pandemic. The second, is that we are accompanying less victims to court per session in criminal court. Pre-pandemic, the ADA's would have around 20 cases in the morning and 20 in the afternoon. Now, the ADA's are scheduling 4 sessions a day with no more than 6 cases per session.

Goal	Measure	Target	Year-End FY21	Mid-Year FY22
Increase Perception of Safety	■ Assist with and provide information regarding Victims Compensation	■ 300 victims will receive information and/or assistance regarding Victims Compensation	69	73
	■ Support sexual assault victims at local area hospitals	■ 110 sexual assault victims will receive support at area hospitals	3	0
	■ Percentage of victims seen at area hospitals that acknowledge the support provided to them by trained staff or volunteer companions	■ 95% of victims will report that trained staff or volunteer companions were helpful	100%	0%

**Comments/ Explanation:**

All staff is knowledgeable regarding Victims Compensation and the application process. Victim Compensation information is provided to all qualified victims and any interested victims will receive assistance with completion of the application. Information regarding Victim's Compensation is provided over the phone and in person at our office and in court.

Due to hospital policies surrounding COVID-19 precautions, volunteers have not been able to respond in person to provide support to victims. The process has shifted for the hospital to reach out to the hotline with the victim present to provide support. Safe Alliance continues to work closely with area hospitals to ensure they understand the process for connecting victims to trained hotline advocates to provide support. Area hospitals continue to provide Safe Alliance resources to sexual assault victims. This empowers victims to reach out for services following their hospital encounters to be connected to trained Sexual Assault Resource Center advocates.

**Current Board of Directors**

Scott Shannon	Sid Fletcher	Markita Payne
Marcy Hingst	Leila Evans	Tom Coyne
Scott Shannon	Nakia Savage	Linda Christopherson
Derek Beres	Noelle Clarke	Becky Lindahl
Spencer Merriweather	Symone Robinson	Virginia (Barnhardt) Sutton
Kimberly Zirkle	Julio Colmenares	Jeffrey Klein
Fred Hudson	Allen O'Rourke	Melissa Romanzo
Judge Faith Fickling-Alvarez	T. Hampton Hopkins, EdD	Shelby Hudspeth
Jeanne Jordan	Phil Klein	

FY 2023 Financial Partner Agency Summary  
 Agency Name: **Sword of Spirit Outreach Inc.**  
*(New Funding Request)*

**Mission Statement**

Our mission is to reach out to distressed communities, broken homes, homeless, unemployed, and the underemployed living in Charlotte, NC. We aim to help at-risk individuals and families by identifying and evaluating their needs and providing practical solutions so they can take control of their futures and experience lives of stability and self-fulfillment to make meaningful contributions to their communities. We strive to create pathways to employment for adolescents and adults through skill development training and life learning opportunities.

**Agency established**

October 10, 2017

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

First time applicant

**Population served**

Sword Of Spirit Outreach Inc will serve the distressed communities and individuals living under the poverty level in and around the Charlotte Metro area in communities such as. Beatties Ford Road, Delahay Court, Parkwood and East Charlotte. The program also provides assistance to ex-offenders seeking a seamless reentry into society from the prison system and those relocating to Charlotte along with veterans and dislocated workers.

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
<b>Sword of Spirit Outreach</b>		✗	✓	✓	✓	✗	✓	✗	✗	✗	✓

*Application notes:*

- *Salary Disclosure: this attachment was not provided as needed based on Personnel Expenditures provided; organization declared staff were volunteer only.*
- *Annual Audit: While no formal Annual Audit (with two-year comparative financials) was provided, the organization did submit their own two-year comparative budget.*
- *Financial Policies: The organization does not have this attachment item developed as of March 2022.*
- *Human Resource Policies: The organization does not have this attachment item developed as of March 2022.*

- *Record and Retention Schedule: The organization does not have this attachment item developed as of March 2022.*

## Organization Funding Support

FY 2022 Funding	FY 2023 Funding Request	Difference
N/A	\$463,500	\$463,500

*\*FY 2023 City funds requested for Personnel and Operating Expenditures.*

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

Sword Of Spirit Outreach will support some operating expenses, equipment, grants for students and salaries for Global Vocational Training Center Inc. Sword Of Spirit Outreach Inc will also support free clothing and food for the distressed. Sword of Spirit Outreach will also support Financial Literacy and leadership training.

## Overall Agency Budget

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications*

	Expenditures FY 2021-FY 2023			
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$50,000	\$180,000	\$224,000	\$170,000
Merit	\$0	\$0	\$0	\$0
Benefits	\$1,150	\$3,260	\$4,100	\$1,500
<b>Subtotal Personnel Expenses</b>	<b>\$51,150</b>	<b>\$183,260</b>	<b>\$228,100</b>	<b>\$171,500</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$40,573	\$55,000	\$90,000	\$85,000
Communications (e.g. publishing, marketing)	\$4,500	\$5,600	\$8,900	\$6,500
Facilities (e.g. rent, utilities)	\$45,000	\$49,000	\$53,000	\$50,000
Office Supplies	\$5,100	\$6,200	\$8,100	\$5,000
Travel & Training	\$1,100	\$1,800	\$2,500	\$2,000
Technology	\$13,000	\$14,500	\$16,200	\$10,000
Other (Please submit document with a breakdown of other)	\$78,050	\$83,050	\$104,450	\$104,000
<b>Subtotal Operating Expenses</b>	<b>\$187,323</b>	<b>\$215,150</b>	<b>\$283,150</b>	<b>\$262,500</b>
<b>Total Expenditures</b>	<b>\$238,473</b>	<b>\$398,410</b>	<b>\$511,250</b>	<b>\$434,000</b>



Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$215,150	\$283,250
Foundation Grants	\$60,000	\$110,000
Donor Contributions	\$190,000	\$200,000
Service Fees	\$32,000	\$45,000
Other Revenue	\$110,000	\$185,000
<b>Total Revenues</b>	<b>\$607,150</b>	<b>\$823,250</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$99,993
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Overall Program Budget

	Expenditures FY 2021-FY 2023			
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$50,000	\$180,000	\$224,000	\$200,000
Merit	\$0	\$0	\$0	\$0
Benefits	\$1,148	\$3,260	\$3,260	\$1,500
<b>Subtotal Personnel Expenses</b>	<b>\$51,148</b>	<b>\$183,260</b>	<b>\$227,260</b>	<b>\$201,500</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$40,000	\$55,000	\$90,000	\$85,000
Communications (e.g. publishing, marketing)	\$4,400	\$5,600	\$8,900	\$6,000
Facilities (e.g. rent, utilities)	\$45,000	\$49,000	\$53,000	\$50,000
Office Supplies	\$5,100	\$6,200	\$8,100	\$5,000
Travel & Training	\$1,100	\$1,800	\$2,500	\$2,000
Technology	\$13,000	\$14,500	\$16,200	\$10,000
Other (Please submit document with a breakdown of other)	\$78,050	\$83,050	\$104,550	\$104,000
<b>Subtotal Operating Expenses</b>	<b>\$186,650</b>	<b>\$215,150</b>	<b>\$283,250</b>	<b>\$262,000</b>
<b>Total Expenditures</b>	<b>\$237,798</b>	<b>\$398,410</b>	<b>\$510,510</b>	<b>\$463,500</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$75,000	\$125,000
Foundation Grants	\$60,000	\$110,000
Donor Contributions	\$45,000	\$75,000
Service Fees	\$32,000	\$45,000
Other Revenue	\$55,000	\$85,000
<b>Total Revenues</b>	<b>\$267,000</b>	<b>\$440,000</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$99,993
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Current Board of Directors

Michael Norman  
Courtney Clarke

Sierra Egerton  
Anjuvira Nabajuna

Dante Wilkerson  
Michael Harris

## FY 2023 Financial Partner Agency Summary

Agency Name: **Time Out to Care Inc.**

*(New Funding Request)*

### Mission Statement

Time Out to Care aims to educate, equip, and empower youth sports leaders, so all children can enjoy the lifelong benefits of sports.

Time Out to Care does this through offering free programs to youth and providing financial assistance to youth sporting facilities and individuals to allow the participation of underprivileged youth. The specific objectives and purpose of this organization shall be:

- To provide financial assistance to sports facilities to set up and run programs for underprivileged youth
- To provide equipment to sports facilities to enable them to run programs for underprivileged youth
- To provide financial assistance in the form of scholarships to underprivileged youth to participate in sporting programs, camps, clinics and teams
- To sponsor, host and/or participate in events and activities that promote youth sport

### Agency established

October 06, 2021

### Total years financial partner with City of Charlotte

First time applicant

### Population served

We focus our efforts on underprivileged youth in neighborhoods/communities that have shown the need for mental health, physical health & physical activity education and economic advancement.

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Time Out Care		✓	✓	✓	✓	N/A	✓	✓	✓	✓	N/A

### Organization Funding Support

FY 2022 Funding	FY 2023 Funding Request	Difference
N/A	\$165,533	\$165,533

*\*FY 2023 City funds requested for Personnel and Operating Expenditures.*

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

Time Out to Care currently run the following programs that will be supported by the city funding

Books & Basketball After School Enrichment Program - For students to come and get their school work done and get basketball training. This program is for boys and girls. Ages: 8-15. Students will do school work for 1.0 hour upon arrival and do basketball training/games for the remaining time. The students will have access to Wi-Fi and student assistants for help with homework.

Girls Basketball Clinic - 1 hour of skills and drills for all skill levels. All girls 4th-8th grade

Holiday Hoops Clinic - Holiday Hoops Clinic is 4 full days of basketball skills, drill and games, for boys and girls of all skills levels

Lab U Training Program - LAB U Training sessions are designed for boys and girls that play or want to play basketball. Sessions are for 4th – 12 grade boys and girls. Children will be divided into groups based on skill &/or age

Fitness Program - Fitness sessions are designed for boys and girls that play or want to increase their fitness level and learn how to keep fit and healthy. Boys and girls are taught the importance of taking care of their bodies inside and out and shown the correct way to go about it. Sessions are for 4th – 12th grade boys and girls. Children will be divided into groups based on skill &/or age.

Youth Enrichment Program - The Youth enrichment program teaches children how to learn and grow into better people. We offer new learning opportunities that will help students do better in school and in life.

High School Hoop Program - High School boys and girls open gym. Open to all high school youth to play pick up games.

Nutrition Program - The Nutrition program teaches youth and parents the importance of eating a balanced diet

Parent Boot Camp - The parent Boot camp is run for the parents of children in any of our programs

Parent Engagement Program - Different activities that encourage parents to participate with their child

Holiday Camps - Every school break we run Holiday Camps, Focusing on leadership, teamwork, reliability, responsibility & dedication through basketball skills, drills and games

Youth Work Program - We give youth the opportunity the work at LABCITY. We show them how to fill out a job application, prepare them for an interview and teach them the importance of punctuality, reliability, being trustworthy, and accountability as well as how to interact properly with customers, co-workers and managers. We also continue to mentor them through the job at LABCITY. This program also includes the Learn How to Referee Program - Youth can learn how to be a basketball referee once qualified can be eligible to work as a referee at LABCITY and the Learn How to Referee Program - Youth can learn how to be a basketball referee once qualified can be eligible to work as a referee at LABCITY.

Charlotte Dragons Basketball Teams - Youth can play in basketball teams through our partnership with the Charlotte Dragons. We have Winter, Spring/Summer, and Fall sessions.

Speed & Agility Program - Youth learn how to be faster and more agile through a variety of drills with a qualified trainer

Strength Program - Youth learn how to use weights correctly and learn how to work different muscle groups with a qualified trainer

Loaves for Souls - Sandwich making event to benefit the Roof Above Men's Shelter of Charlotte. Each child brings 1 loaf of bread, 1 pound of lunch meat, 1 pack of cheese to sandwiches which are taken to the shelter by a staff member after the event

## Overall Agency Budget

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications*

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$0	\$48,457	\$59,095	\$59,095
Merit	\$0	\$0	\$10,638	\$10,638
Benefits	\$0	\$0	\$0	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$0</b>	<b>\$48,457</b>	<b>\$69,733</b>	<b>\$69,733</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$32,500	\$50,000	\$50,000
Communications (e.g. publishing, marketing)	\$0	\$8,750	\$9,900	\$9,900
Facilities (e.g. rent, utilities)	\$0	\$12,000	\$13,500	\$13,500
Office Supplies	\$0	\$500	\$900	\$900
Travel & Training	\$0	\$10,000	\$15,000	\$15,000
Technology	\$0	\$5,000	\$6,500	\$6,500
Other (Please submit document with a breakdown of other)	\$0	\$0	\$0	\$0
<b>Subtotal Operating Expenses</b>	<b>\$0</b>	<b>\$68,750</b>	<b>\$95,800</b>	<b>\$95,800</b>
<b>Total Expenditures</b>	<b>\$0</b>	<b>\$117,207</b>	<b>\$165,533</b>	<b>\$165,533</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$0	\$0
Foundation Grants	\$0	\$0
Donor Contributions	\$25,000	\$5,000
Service Fees	\$5,000	\$5,000
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$30,000</b>	<b>\$10,000</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$165,533

## Current Board of Directors

Marc Bergren

Carl Baxter

Leonard Hillard

Lisa Dancy

Andre Speech

## FY 2023 Financial Partner Agency Summary

Agency Name: **TreesCharlotte**

*(Current Financial Partner)*

### Mission Statement

TreesCharlotte is a public/private nonprofit collaboration to grow, diversify and steward the city's iconic urban forest. Trained volunteers and science-based programs teach residents about the value of trees, how to plant and care for them.

### Agency established

January 01, 2013

### Total years financial partner with City of Charlotte

4 years

### Population served

TreesCharlotte serves all residents of Charlotte with an emphasis on neighborhoods that are under-canopied or at risk of becoming under-canopied. Through our NeighborWoods program and TreeAdoption events, we serve thousands of people each year.

In addition to these widely cast nets, we focus on under-served communities. Using the data gathered in our 2018 canopy assessment overlaid with the county's demographic data, we reach out to neighborhoods, non-profits, churches and other partners in areas that have lost significant canopy or are lower canopied.

In addition, we've added a First-timer component to each of our popular Zip Code TreeAdoptions, where we invite residents of those targeted zip codes that have never gotten trees from us before to register early. This has greatly expanded our outreach efforts, engaging new tree enthusiasts in our mission. The concept has been a big success.

Application Status		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
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
TreesCharlotte		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

### Organization Funding Support

FY 2022 Funding	FY 2023 Funding Request	Difference
\$150,000	\$150,000	\$0

*\*FY 2023 City funds requested for Operating Expenditures.*

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

TreesCharlotte will use the funding to purchase 3,300 seven-gallon trees that will be planted and distributed throughout the city during the Oct-March planting season with a specific focus on under-canopied and high loss canopied areas. TreesCharlotte will accomplish this through two key programs: NeighborWoods: TreesCharlotte partners with qualifying neighborhoods, schools, houses of faith, athletic associations and other non-profit organizations to host tree-planting and tree-giveaway events. These organized events can be a great way to build camaraderie, beautify our community and add to the city's canopy. TreeAdoptions: Residents can get two free trees to plant in their own yards. Some TreeAdoptions are open to all Charlotteans, others are limited to certain zip codes. Ultimately, every zip code is served as the season progresses. We reach residents through various marketing and communications initiatives.

**Overall Agency Budget**

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications*

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$283,116	\$394,983	\$459,250	\$0
Merit	\$0	\$28,000	\$37,000	\$0
Benefits	\$0	\$22,500	\$38,000	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$283,116</b>	<b>\$445,483</b>	<b>\$534,250</b>	<b>\$0</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$27,920	\$34,000	\$45,000	\$30,000
Facilities (e.g. rent, utilities)	\$0	\$0	\$0	\$0
Office Supplies	\$7,514	\$7,500	\$6,000	\$0
Travel & Training	\$1,660	\$6,400	\$10,000	\$0
Technology	\$0	\$0	\$8,500	\$0
Other (Please submit document with a breakdown of other)	\$388,205	\$364,300	\$445,125	\$120,000
<b>Subtotal Operating Expenses</b>	<b>\$425,299</b>	<b>\$412,200</b>	<b>\$514,625</b>	<b>\$150,000</b>
<b>Total Expenditures</b>	<b>\$708,415</b>	<b>\$857,683</b>	<b>\$1,048,875</b>	<b>\$150,000</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$0	\$0
Foundation Grants	\$310,000	\$310,000
Donor Contributions	\$207,000	\$275,000
Service Fees	\$0	\$0
Other Revenue	\$214,000	\$275,000
<b>Total Revenues</b>	<b>\$731,000</b>	<b>\$860,000</b>



Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Performance Objectives Report

**Corporate Scorecard Objective:** Safeguard the environment

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Safeguard the environment	■ Planting trees in under- canopied parts of Charlotte	■ 3,300 trees planted/givenaway to plant	5,897 trees planted/given away to plant	2,760 trees planted/given away to plant
	■ Adding trees to school campuses, where our youngest citizens are	■ Working with up to 6 CMSschools/charter schools oncampus plantings	Planted trees at 4 CMS campuses	Planted trees at 5 CMS campuses
	■ Educating residents on propercare of trees	■ Deliver 15 educationalevents		Hosted 12 education events

**Corporate Scorecard Objective:** Strengthen neighborhoods

Goal	Measure	Target	Year-EndFY2021	Mid-Year FY2022
Strengthen neighborhoods	■ Involve new neighborhoods intree planting	■ 12 neighborhood plantings/distributi ons	10 neighborhood plantings/ distribution events	Hosted 5 neighborhood/ community plantings/ distribution events
	■ Create neighborhood engagement ■ Improve health, shade and economic value of neighborhood	■ Pilot tree care program in Revolution Park and Historic West End where TreesCharlotte and other partners assess and cover tree care costs for qualifyingresidents	New program	A tree assessment wasdone in Revolution Parkand application opened to residents to cover care costs. Hosted TreeAdoption for residents of Historic West End.

**Corporate Scorecard Objective:** Invest in infrastructure

Goal	Measure	Target	Year-EndFY2021	Mid-Year FY2022
Invest in infrastructure	<ul style="list-style-type: none"> <li>Add trees to neighborhoods throughout the city</li> </ul>	<ul style="list-style-type: none"> <li>3,300 trees, adding to the city's "green infrastructure"</li> </ul>	5,897 treesplanted/ given awayto plant	2,760 trees planted/ given awayto plant

**Corporate Scorecard Objective:** Enhance education and engagement opportunities

Goal	Measure	Target	Year-EndFY2021	Mid-Year FY2022
Enhance education and engagement opportunities	<ul style="list-style-type: none"> <li>A Community Tree Educator will conduct workshops, presentations, school visits,etc. and teach residents on the importance of trees</li> </ul>	<ul style="list-style-type: none"> <li>Community Tree Educatorwill hold 20 educational events, including a summer camp experiencefor children</li> <li>The Big Tree Summit will return, with a wider arrayof workshops</li> <li>A special stakeholder's event will be held prior tothe Big Tree Summit</li> </ul>	Community Tree Educator was hired in FY21	Hosted 12 education events and 2 summer camp experiences

**Comments/ Explanation:**

The Big Tree Summit has been postponed to FY23 due to COVID.

**Current Board of Directors**

Thus Morton

Peggy Brookhouse

Rob Harrington

Susan McDonough

Stoney Sellars

Robert A. Bartlett

Kodwo Ghartey-Tagoe

Marcus Jones

Susan McKeithen

Chris Thomas

Sam Bowels

Mary Hall

Paul Kardous

John Petrone

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## DEDICATED REVENUE

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## FY 2023 Financial Partner Agency Summary

### Agency Name: **Charlotte Center City Partners**

#### **Mission Statement**

Charlotte Center City Partners (CCCP) boldly envisions and activates strategies and actions that will assure Charlotte Center City is a welcoming and equitable, economically vibrant, culturally rich and beloved place for all. We believe in:

- The value of great urban places
- Acting with integrity
- The power of collaboration
- A commitment to justice and equity
- Approaching all we do with passion, innovation, tenacity and excellence

#### **Agency established**

July 01, 1979

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

40 years

#### **Population served**

We serve the geography of MSD's 1-4 - Uptown and South End. The population includes property owners, businesses, workers, residents, cultural arts, hospitality and entertainment venues and all visitors. We also work with the City, County and School Board staffs and elected officials as well as the State.

We also work as economic development partners with the State, County, City, Alliance, CRVA, brokers and others to provide support for the recruitment and retention of businesses and employees.

We work as partners with entertainment and hospitality stakeholders to create welcoming and inclusive experiences for all, in Uptown and South End. We work with the residents to incorporate their priorities into our program of work and support their initiatives to make Uptown and South End inviting places to live for all.

We work with our public safety partners to make sure every experience in Uptown and South End is a safe one. We also work to be sure this is a safe district for all.

And we work with our public service partners and Mecklenburg County on the 2025 Housing and Homelessness Strategy to address housing and homelessness in our community, serving the most vulnerable in our community.

#### **Organization Funding Support**

FY 2022 Funding	FY 2023 Funding Request	Difference
\$6,232,801	\$6,511,389	\$278,588

*\*FY 2023 City funds requested for Personnel and Operating Expenditures.*

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

Charlotte Center City Partners relies on a talented and dedicated staff to execute our mission and program of work. Some of the funding will be used to retain, develop and engage a diverse and inclusive staff. We have a strong focus on small business. One part of that is the development of a retail entrepreneurship pipeline with a focus on diversity, equity and inclusion, including mentoring. Part of that focus will be on Uptown. We are putting a strong emphasis on initiatives to add vibrancy, hospitality, equity and safety in the Center City, with a focus on Uptown. We are also investing in South End as it grows and develops.

**Overall Agency Budget**

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications*

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$2,635,820	\$2,704,463	\$2,799,119	\$2,799,119
Merit	\$31,229	\$69,478	\$71,910	\$71,910
Benefits	\$674,473	\$822,701	\$872,063	\$872,063
<b>Subtotal Personnel Expenses</b>	<b>\$3,341,522</b>	<b>\$3,596,642</b>	<b>\$3,743,092</b>	<b>\$3,743,092</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$163,109	\$188,000	\$203,000	\$203,000
Facilities (e.g. rent, utilities)	\$207,015	\$249,314	\$245,340	\$245,340
Office Supplies	\$29,841	\$30,000	\$30,000	\$30,000
Travel & Training	\$126,747	\$119,150	\$133,350	\$133,350
Technology	\$129,236	\$95,700	\$125,700	\$125,700
Other (Please submit document with a breakdown of other)	\$2,403,552	\$2,618,642	\$2,515,533	\$2,030,907
<b>Subtotal Operating Expenses</b>	<b>\$3,059,500</b>	<b>\$3,300,806</b>	<b>\$3,252,923</b>	<b>\$2,768,297</b>
<b>Total Expenditures</b>	<b>\$6,401,022</b>	<b>\$6,897,448</b>	<b>\$6,996,015</b>	<b>\$6,511,389</b>

Revenues		
(Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$0	\$0
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$0
Service Fees	\$0	\$0
Other Revenue	\$293,500	\$337,626
<b>Total Revenues</b>	<b>\$293,500</b>	<b>\$337,626</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Current Board of Directors

Tom Finke	Diane Morais	Clay Armbrister
Malcomb Coley	Jesse Cureton	Dr. Kandi Deitemeyer
Derryl Dewberry	Dena Diorio	George Dunlap
Rob Engel	Kodwo Ghartey-Tagoe	Tom Glick
Malcolm Graham	Johno Harris	Mark Holoman
Taiwo Jaiyeoba	Marcus Jones	Sam Judd
Janet LaBar	Tiffani Lewis	Carol Lovin
Dr. Michael Marsicano	Tom Murray	Tom Nelson
Cindy Noble	Mike Praeger	Ernie Reigel
TBD – Johnson & Wales University	Pay Riley	Pat Rogers
Krista Terrell	Earnest Winston	Darrel Williams

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## FY 2023 Financial Partner Agency Summary

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

#### **Mission Statement**

Embracing an inclusive, employee first culture, the CRVA is the trusted leader of Charlotte's visitor economy which elevates community prosperity through destination-defining infrastructure, impactful branding, and job growth.

#### **Agency established**

July 01, 2004

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

40 years

#### **Population served**

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

#### **Organization Funding Support**

FY 2022 Funding	FY 2023 Funding Request	Difference
\$18,072,813	\$18,614,997	\$542,184

*\*FY 2023 City funds requested for Personnel and Operating Expenditures.*

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

Increased funding request by 3% to help recover from pandemic and market Convention Center expansion.

#### **Overall Agency Budget**

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications*

	Expenditures FY 2021-FY 2023			
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$17,686,042	\$20,049,687	\$20,651,178	\$5,434,333
Merit	\$0	\$0	\$0	\$0
Benefits	\$12,963,805	\$8,753,860	\$9,016,476	\$2,407,552
<b>Subtotal Personnel Expenses</b>	<b>\$30,649,847</b>	<b>\$28,803,547</b>	<b>\$29,667,654</b>	<b>\$7,841,885</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$6,542,990	\$5,711,000	\$6,615,000	\$0

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
Communications (e.g. publishing, marketing)	\$5,462,021	\$8,120,797	\$8,364,421	\$6,740,310
Facilities (e.g. rent, utilities)	\$6,606,952	\$6,539,940	\$6,736,138	\$427,579
Office Supplies	\$561,782	\$894,201	\$921,027	\$31,317
Travel & Training	\$143,872	\$961,640	\$990,489	\$729,534
Technology	\$0	\$0	\$0	\$0
Other (Please submit document with a breakdown of other)	\$7,245,365	\$13,671,687	\$14,081,838	\$2,844,372
<b>Subtotal Operating Expenses</b>	<b>\$26,562,982</b>	<b>\$35,899,265</b>	<b>\$37,708,913</b>	<b>\$10,773,112</b>
<b>Total Expenditures</b>	<b>\$57,212,829</b>	<b>\$64,702,812</b>	<b>\$67,376,567</b>	<b>\$18,614,997</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$35,938,130	\$36,662,420
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$0
Service Fees	\$683,090	\$0
Other Revenue	\$28,081,592	\$30,714,147
<b>Total Revenues</b>	<b>\$64,702,812</b>	<b>\$67,376,567</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$150,000
FY 2022 Current Budget	\$150,000
FY 2023 Projected (as requesting)	\$150,000

## Current Board of Directors

Jon Dressler

Mike Evans

Kimberly Edmonds Nelson

Dockery Clark

Erma Allen

Boris Bunich

Thomas Dolan

Tom Sasser

Karen Bentley

Lorie Spratley

Clarke Allen

Ervin Gouridine

Vinay Patel

## FY 2023 Financial Partner Agency Summary

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

#### **Mission Statement**

Embracing an inclusive, employee first culture, the CRVA is the trusted leader of Charlotte's visitor economy which elevates community prosperity through destination-defining infrastructure, impactful branding and job growth.

#### **Agency established**

July 01, 2004

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

40 years

#### **Population served**

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

#### **Organization Funding Support**

FY 2022 Funding	FY 2023 Funding Request	Difference
\$150,000	\$150,000	\$0

*\*FY 2023 City funds requested for Personnel and Operating Expenditures.*

#### **Overall Agency Budget**

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications*

	Expenditures FY 2021-FY 2023			
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$17,686,042	\$20,049,687	\$20,651,178	\$5,434,333
Merit	\$0	\$0	\$0	\$0
Benefits	\$12,963,805	\$8,753,860	\$9,016,476	\$2,407,552
<b>Subtotal Personnel Expenses</b>	<b>\$30,649,847</b>	<b>\$28,803,547</b>	<b>\$29,667,654</b>	<b>\$7,841,885</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$6,542,990	\$5,711,000	\$6,615,000	\$0
Communications (e.g. publishing, marketing)	\$5,462,021	\$8,120,797	\$8,364,421	\$6,740,310
Facilities (e.g. rent, utilities)	\$6,606,952	\$6,539,940	\$6,736,138	\$427,579
Office Supplies	\$561,782	\$894,201	\$921,027	\$31,317
Travel & Training	\$143,872	\$961,640	\$990,489	\$729,534
Technology	\$0	\$0	\$0	\$0

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
Other (Please submit document with a breakdown of other)	\$7,245,365	\$13,671,687	\$14,081,838	\$2,844,372
<b>Subtotal Operating Expenses</b>	<b>\$26,562,982</b>	<b>\$35,899,265</b>	<b>\$37,708,913</b>	<b>\$10,773,112</b>
<b>Total Expenditures</b>	<b>\$57,212,829</b>	<b>\$64,702,812</b>	<b>\$67,376,567</b>	<b>\$18,614,997</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$35,938,130	\$36,662,420
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$0
Service Fees	\$683,090	\$0
Other Revenue	\$28,081,59	\$30,714,147
<b>Total Revenues</b>	<b>\$64,702,812</b>	<b>\$67,376,567</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$150,000
FY 2022 Current Budget	\$150,000
FY 2023 Projected (as requesting)	\$150,000

## Overall Program Budget

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$135,742	\$138,065	\$142,207	\$72,207
Merit	\$0	\$0	\$0	\$0
Benefits	\$59,774	\$64,982	\$66,931	\$34,931
<b>Subtotal Personnel Expenses</b>	<b>\$195,516</b>	<b>\$203,047</b>	<b>\$209,138</b>	<b>\$107,138</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$17,076	\$50,200	\$51,706	\$27,608
Facilities (e.g. rent, utilities)	\$0	\$0	\$0	\$0
Office Supplies	\$282	\$600	\$618	\$618
Travel & Training	\$1,021	\$20,790	\$21,414	\$1,414
Technology	\$0	\$0	\$0	\$0
Other (Please submit document with a breakdown of other)	\$20,291	\$30,313	\$31,222	\$13,222

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Subtotal Operating Expenses</b>	<b>\$38,670</b>	<b>\$101,903</b>	<b>\$104,960</b>	<b>\$42,862</b>
<b>Total Expenditures</b>	<b>\$234,186</b>	<b>\$304,950</b>	<b>\$314,098</b>	<b>\$150,000</b>

Revenues		
(Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$150,000	\$150,000
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$0
Service Fees	\$0	\$0
Other Revenue	\$154,950	\$164,098
<b>Total Revenues</b>	<b>\$304,950</b>	<b>\$314,098</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$150,000
FY 2022 Current Budget	\$150,000
FY 2023 Projected (as requesting)	\$150,000

## Current Board of Directors

Jon Dressler

Mike Evans

Kimberly Edmonds Nelson

Dockery Clark

Erma Allen

Boris Bunich

Thomas Dolan

Tom Sasser

Karen Bentley

Lorie Spratley

Clarke Allen

Ervin Gourdine

Vinay Patel

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## FY 2023 Financial Partner Agency Summary

Agency Name: **University City Partners**

### Mission Statement

We envision and implement strategies and actions to drive University City's long term economic vitality as a center for employment, living, education, commerce and entertainment.

### Agency established

January 01, 2003

### Total years financial partner with City of Charlotte

20 years

### Population served

MSD5 is located in northeastern Mecklenburg County, roughly bound by Mallard Creek Church Road to the north, NC 49 on the east, Neal Road to IBM Drive moving south to west and Mallard Creek Road along the western edge. This area include the University Research Park, Innovation Park, University Executive Park, UNC Charlotte, Atrium University City Hospital and four transit station areas along Tryon Street.

University City is proud to serve a population that is unique in many ways. With over 30,000 students at UNC Charlotte hailing from 47 states and 105 countries, we are one of the most diverse places in Charlotte as well as one of the youngest, with our 20-34 population exceeding the Mecklenburg County average by 11%. Not only does our resident population tilt younger, University City is 33% white, 43% black and 16% Asian, which further illustrates the diverse nature of our residents as compared to Mecklenburg County as a whole (48%, 31%, 5%)

This high level demographic analysis can be expounded on with anecdotal wisdom regarding the population we serve. Largely middle class, the population of University City range from young families, professors, students, businesses large and small, and many professionals at all stages of their career. As the second largest employment center in the city as well as a place delivering more housing units than anywhere else across the city, we expect to change overtime.

### Organization Funding Support

FY 2022 Funding	FY 2023 Funding Request	Difference
\$1,162,593	\$1,197,480	\$ 34,887

*\*FY 2023 City funds requested for Personnel and Operating Expenditures.*

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

This proposal requests an additional 3% of funding over last year, projecting the natural increase of property value within the MSD as well as continued inflation. This funding will be used to:

- Implement a wayfinding program, currently in the final stages of approval by NCDOT,

- Bolster the Farmers Market in its second full season and operating at least 30 Saturdays per year, and
- Enhance the availability of professional, which was balanced with a decrease payroll.

## Overall Agency Budget

The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications

Expenditures FY 2021-FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$332,505	\$364,620	\$347,230	\$347,230
Merit	\$26,610	\$34,871	\$17,000	\$17,000
Benefits	\$30,438	\$31,600	\$27,000	\$27,000
<b>Subtotal Personnel Expenses</b>	<b>\$389,554</b>	<b>\$431,091</b>	<b>\$391,230</b>	<b>\$391,230</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$2,500	\$2,500	\$2,500	\$2,500
Facilities (e.g. rent, utilities)	\$75,649	\$84,538	\$84,538	\$84,538
Office Supplies	\$4,467	\$10,000	\$9,000	\$9,000
Travel & Training	\$16,603	\$15,600	\$19,600	\$19,600
Technology	\$10,550	\$12,000	\$11,000	\$11,000
Other (Please submit document with a breakdown of other)	\$460,484	\$606,864	\$707,976	\$667,976
<b>Subtotal Operating Expenses</b>	<b>\$570,255</b>	<b>\$731,502</b>	<b>\$834,614</b>	<b>\$794,614</b>
<b>Total Expenditures</b>	<b>\$959,809</b>	<b>\$1,162,593</b>	<b>\$1,225,844</b>	<b>\$1,185,844</b>

Revenues (Excluding revenues received from the City of Charlotte and Mecklenburg County)		
	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants	\$0	\$0
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$0
Service Fees	\$0	\$0
Other Revenue	\$37,500	\$40,000
<b>Total Revenues</b>	<b>\$37,500</b>	<b>\$40,000</b>

Total Funds received from Mecklenburg County	
Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0



## Current Board of Directors

Stuart Parks

Ryan Wetherington

George Dunlap

Leslie Johnson

Renee Perkins Johnson

Todd Dunn

Bill Leonard

Richmond Baker

Joyce Tompkins

Michael Fung

Shannon Dixon

Tom Creter

Jane Wu,

Betty Doster

Lat Purser

Phil Nicholenko

Taiwo Jaiyeoba

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## Housing and Neighborhood Services

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## FY 2023 Financial Partner Agency Summary

Agency Name: **Carolinas CARE Partnership**

### **Scope of Service:**

Carolinas CARE Partnership (CCP) is dedicated to seeking justice through health and housing. To achieve this mission, the agency is committed to coordinating, developing and providing care, service, training, prevention, and housing programs that address the complex issues of HIV/AIDS, and those persons directly affected by the epidemic in the Charlotte Metropolitan Statistical Area (MSA). Carolinas CARE Partnership has been the regional administrative agent for Housing Opportunities for Persons with AIDS (HOPWA) programs for the MSA since 1998. The intended use of these funds is to provide supportive services for meeting the housing needs of persons living with HIV, AIDS, or related diseases, and their families in the ten-county MSA.

Carolinas CARE Partnership provides the following services to clients and agencies throughout the ten-county MSA with HOWPA funding: housing information services, short-term rent, mortgage, and utility assistance; housing case management, resource identification, mental health counseling, transportation services, technical assistance, permanent housing placement, facility-based housing assistance and tenant-based housing assistance. For FY2022, Carolinas CARE Partnership awarded restricted grant funding to eleven (11) agencies for the development, enhancement, and advancement of housing and supportive programs for people living with HIV and AIDS. These resources prevent homelessness and allow people living with HIV-AIDS the ability to secure more stable housing situations that help improve their overall health and well-being.

### **Mission Statement:**

The mission of Carolinas CARE Partnership to foster and ensure a regional approach to prevent the spread of HIV and AIDS, and to meet with compassion and dignity the needs of those affected by these diseases.

**FY 2022:** \$2,938,627

**Supports:** Housing resources and homelessness prevention for HIV and AIDS population.

**FY 2023 Request:** \$3,085,558

[Note: FY23 HOPWA award to Carolinas CARE Partnership is an estimate based on the FY22 HOWPA grant awarded by Housing & Urban Development (HUD).]

**Increase:** \$146,931

**Supports:** Additional housing resources for HIV and AIDS population. Funding is determined and provided by U. S. Department of Housing and Urban Development (HUD).

**Agency Established:** 1989

**Total Years Financial Partner with City of Charlotte**

24 Years

### **Population Served:**

Carolinas CARE Partnership, founded in 1989 as a partnership between the United Way of Central

Carolinas and Foundation for the Carolinas, is a community-based 501(c)3 organization which serves individuals at risk for and living with HIV and AIDS, including youth, minorities, women, and those experiencing homelessness. CCP provides a continuum of services from HIV and STI education and testing to Linkage to Care, Medical Case Management, Mental Health, and an array of housing services.

## Performance Objectives Report

Goal	FY 2023 Target	Mid-Year FY 2022	FY 2021 Actual
Increase the number of households in the MSA assisted with HOPWA funding	762	598	939

## Overall Agency Budget

Expense and revenue budget information for entire agency including all programs and funding sources.

Expenditures FY 2021 - FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$1,085,983	\$1,128,763	\$1,249,262	\$693,298
Merit	\$0	\$0	\$0	\$0
Benefits	\$295,236	\$328,638	\$374,778	\$207,989
<b>Subtotal Personnel Expenses</b>	<b>\$1,381,219</b>	<b>\$1,457,401</b>	<b>\$1,624,040</b>	<b>\$901,287</b>
<b>Operating</b>				
Capital Equipment (e.g. laptop/computer purchase)	\$0	\$0	\$0	\$0
Communications (telephone/internet, printing/publishing, postage, marketing/branding)	\$3,925	\$17,173	\$10,456	\$5,751
Facilities (Occupancy)	\$90,215	\$108,405	\$144,055	\$79,230
Office Supplies	\$27,016	\$26,700	\$27,557	\$6,250
Travel & Training	\$37,935	\$46,220	\$49,267	\$24,633
Technology (including monthly/annual fees for software, licenses, etc)	\$28,572	\$28,971	\$29,632	\$16,297
Other (Please submit document with a breakdown of other)	\$1,944,928	\$2,251,109	\$2,348,743	\$2,052,110
<b>Subtotal Operating Expenses</b>	<b>\$2,132,591</b>	<b>\$2,478,578</b>	<b>\$2,609,710</b>	<b>\$2,184,271</b>
<b>Total Expenditures</b>	<b>\$3,513,810</b>	<b>\$3,935,979</b>	<b>\$4,233,750</b>	<b>\$3,085,558</b>

**All revenues, excluding revenues received from the City of Charlotte and Mecklenburg County.**

Agency Revenues	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants & Funding	\$477,381	\$521,439
Foundation Grants & Funding	\$5,000	\$5,000
Donor Contributions	\$1,000	\$1,000
Service Fees (rents)	\$131,523	\$131,523
Other Revenue	\$70,000	\$85,000
<b>Total Revenues</b>	<b>\$684,904</b>	<b>\$743,962</b>

**Total funds received from Mecklenburg County, if applicable for each fiscal year.**

Fiscal Year	Total Funds
FY 2021 Prior Year	\$258,415
FY 2022 Current Budget	\$303,821
FY 2023 Projected (as requesting)	\$339,081

## Overall Program Budget

The expenses and revenue budget information for the specified program including all funding sources.

	Expenditures FY 2021 - FY 2023			
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$584,389	\$646,102	\$693,298	\$693,298
Merit	\$0	\$0	\$0	\$0
Benefits	\$158,457	\$188,838	\$207,989	\$207,989
<b>Subtotal Personnel Expenses</b>	<b>\$742,846</b>	<b>\$834,940</b>	<b>\$901,287</b>	<b>\$901,287</b>
<b>Operating</b>				
Capital Equipment (laptop computers)	\$0	\$0	\$0	\$0
Communications (postage, printing, telephone/internet, publishing, marketing)	\$2,238	\$3,200	\$5,751	\$5,751
Facilities (occupancy)	\$51,785	\$53,169	\$79,230	\$79,230
Office Supplies	\$4,447	\$4,900	\$6,250	\$6,250
Travel & Training	\$19,329	\$30,940	\$24,633	\$24,633
Technology (including annual/monthly fees)	\$14,605	\$14,893	\$16,297	\$16,297
Other (Please submit document with a breakdown of other)	\$1,652,463	\$1,928,974	\$2,134,083	\$2,052,110
<b>Subtotal Operating Expenses</b>	<b>\$1,744,867</b>	<b>\$2,036,076</b>	<b>\$2,266,244</b>	<b>\$2,184,271</b>
<b>Total Expenditures</b>	<b>\$2,487,713</b>	<b>\$2,871,016</b>	<b>\$3,167,531</b>	<b>\$3,085,558</b>

**All revenues, excluding revenues received from the City of Charlotte and Mecklenburg County:**

<b>Program Specific Revenues</b>	<b>FY 2022 Current Budget</b>	<b>FY 2023 Projected Budget</b>
Government Grants & Funding	\$0	\$0
Foundation Grants & Funding	\$0	\$0
Donor Contributions	\$0	\$0
Service Fees	\$0	\$0
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$0</b>	<b>\$0</b>

\*These funds are used to maintain the apartments at Grant Station that are HOPWA funded

Total funds received from Mecklenburg County, if applicable for each fiscal year.

<b>Fiscal Year</b>	<b>Total Funds</b>
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0



## FY 2023 Financial Partner Agency Board of Directors

### Agency Name: Carolinas Care Partnership

**CHAIR: VONTINA MCGRANT**  
**VICE CHAIR: JANE CLARK**  
**TREASURER: TONI TRAMMELL**

**Dentavius Barber (2023)**  
Barber Therapy Associates  
2071 Mallard Creek Drive  
Rock Hill, SC 29732  
[dbarber@barbertherapy.com](mailto:dbarber@barbertherapy.com) 803-487-8676

**Michael K. Leonard, MD (2023)**  
Atrium Health  
3518 Bellevue Lane Charlotte, NC 28226  
[Michael.leonard@atriumhealth.org](mailto:Michael.leonard@atriumhealth.org)  
704-962-8590

**Patrick Cayo (2023)**  
Wells Fargo  
1082 Archibald Ave,  
Fort Mill, SC 29708  
[Patrick.cayo@gmail.com](mailto:Patrick.cayo@gmail.com) 919-791-8490

**Vontina McGrant (2023)**  
Knee-High Children's Learning Center  
2010 Russell Avenue,  
Charlotte, NC 28216  
[vontina2002@yahoo.com](mailto:vontina2002@yahoo.com) 704-605-9023

**Jane Clark (2022)**  
CARE Consulting Group  
13814 Holgate Hill Drive,  
Mint Hill, NC 28227  
[Janeclark719@gmail.com](mailto:Janeclark719@gmail.com) (704) 221-8844

**Tonia Trammell (2022)**  
The Legal Aid of North Carolina  
6717 English Hills Drive, Apt. 3B,  
Charlotte, NC  
[toniatrammell@gmail.com](mailto:toniatrammell@gmail.com) 704-836-6772

**Frank Dorsey (2022)**  
Johnson C. Smith University  
100 Beatties Ford Road,  
Charlotte, NC 28216  
[fdorsey@jcsu.edu](mailto:fdorsey@jcsu.edu) 704-378-3501

**Jeffrey Van Houtte (2022)**  
Kohl's  
5959 Amity Springs Drive  
Charlotte, NC 28212  
[jayvanhoutte@gmail.com](mailto:jayvanhoutte@gmail.com) 704-641-5590

**Scott Elam (2023)**  
Domtar Paper  
1559 Springpoint Road, Rock Hill, SC 29732  
[elamscott47@gmail.com](mailto:elamscott47@gmail.com) 803-371-6951

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## FY 2023 Financial Partner Agency Summary

Agency Name: **Crisis Assistance Ministry**

### **Scope of Service:**

The City Energy Assistance (CEA) program provides direct payments to utility companies on behalf of low-income households residing in Charlotte who are unable to pay their utility bills during times of financial crisis. Due to COVID-19, the agency experienced an 44% increase of customers who visited the agency seeking financial assistance for the first time ever. For FY 2023, it is estimated that families requesting utility assistance will greatly increase. The average CEA amount for FY 2022 is \$250 per household.

Housing stability has been severely weakened as shown by the amount of aid needed to keep thousands stably housed. The Emergency Rental Assistance provided emergency rental assistance for low-income households residing in designated areas by the City who are unable to pay their rent during times of financial crisis. These funds assisted people in crisis before they owed more than one-month's rent. For FY 2022, the amount of City funds used for an average ERA amount is \$450 per household.

Although, the CEA and ERA programs help prevent homelessness, thousands of low-income families will continue to experience the long-term economic effects of the pandemic for years to come.

### **Mission Statement:**

The mission of Crisis Assistance Ministry is to provide assistance and advocacy for people in financial crisis, helping them move toward self-sufficiency.

**FY 2022:** \$425,000

**Supports:** Operations of City Energy Assistance Program and Emergency Rental Assistance Program.

**FY 2023 Request:** \$550,000 [Utility Assistance - \$175,000/Rental Assistance - \$375,000]

**Increase:** \$125,000

**Supports:** Increased public services for preventing homelessness and providing emergency rent and utility assistance.

**Agency Established:** 1975

**Total Years Financial Partner with City of Charlotte:** 34 Years

### **Population Served:**

Crisis Assistance Ministry provides families with assistance meeting life's basic needs (housing, utilities, clothing, furniture), preventing a financial crisis from developing into a downward spiral towards homelessness.

## Performance Objectives Report

### Corporate Scorecard Objective:

Goal	FY 2023 Target	Mid-Year FY 2022	FY 2021 Actual
Provide households with energy assistance	1,000	500	800*
Provide households with rental assistance	660	200	N/A

*\*Note: At the City's request for FY2021 (after the grant was awarded), the City of Charlotte rental assistance funds were allocated to Utility Assistance for water.*

### Overall Agency Budget

*The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications.*

Expenditures FY 2021 - FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$4,981,674	\$3,904,641	\$3,687,614	\$28,000
Merit	\$701,971	\$693,627	\$772,671	\$0
Benefits	\$306,355	\$334,070	\$303,246	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$5,990,000</b>	<b>\$4,932,338</b>	<b>\$4,763,531</b>	<b>\$28,000</b>
<b>Operating</b>				
Communications (e.g. publishing, marketing)	\$171,255	\$125,302	\$119,037	\$0
Travel & Training	\$46,987	\$51,284	\$48,720	\$0
Facilities (e.g. rent, utilities)	\$308,694	\$231,200	\$172,140	\$0
Technology (including monthly/annual fees for software, licenses, etc)	\$364,724	\$280,548	\$266,520	\$0
Fees & Services	\$269,787	\$480,413	\$143,000	\$0
Other (Please submit document with a breakdown of other)	\$245,423	\$94,509	\$56,446	\$0
<b>Subtotal Operating Expenses</b>	<b>\$1,406,870</b>	<b>\$1,263,256</b>	<b>\$805,863</b>	<b>\$0</b>
Direct Client Aid	\$9,959,047	\$6,222,930	\$5,140,175	\$522,000
Client Aid-Materials	\$919,564	\$3,000,000	\$3,000,000	\$0
<b>Total Expenditures</b>	<b>\$18,275,481</b>	<b>\$15,418,524</b>	<b>\$13,709,569</b>	<b>\$550,000</b>

**All revenues, excluding revenues received from the City of Charlotte and Mecklenburg County:**

Agency Revenues	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants & Funding	\$3,793,027	\$3,417,393
Foundation Grants & Funding	\$1,585,121	\$1,585,121
Donor Contributions	\$6,320,323	\$5,252,054
Donor Contributions – In Kind	\$3,155,000	\$3,155,000
Other Revenue	\$565,053	\$300,000
<b>Total Revenues</b>	<b>\$15,418,524</b>	<b>\$13,709,568</b>
Less: City & County Revenues	(\$3,417,393)	(\$3,160,393)
<b>Total Revenues (Excluding City &amp; County Revenues)</b>	<b>\$12,001,131</b>	<b>\$10,549,175</b>

**Total funds received from Mecklenburg County, if applicable for each fiscal year.**

Fiscal Year	Client Aid	Operating	Total Funds
FY 2021 Prior Year	\$1,833,900	\$1,720,965	\$3,554,865
FY 2022 Current Budget	\$2,449,898	\$542,495	\$2,992,393
FY 2023 Projected (as requesting)	\$2,269,898	\$365,495	\$2,635,393

**Overall Program Budget**

Expenses and revenue budget information for the specified program including all funding sources.

Expenditures FY 2021 - FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$3,275,512	\$2,608,873	\$2,478,429	\$28,000
Merit	\$437,589	\$407,339	\$386,972	\$0
Benefits	\$187,736	\$196,437	\$186,616	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$3,900,837</b>	<b>\$3,212,649</b>	<b>\$3,052,017</b>	<b>\$28,000</b>
<b>Operating</b>				
Communications (publishing, marketing)	\$64,707	\$24,038	\$22,836	\$0
Travel & Training	\$3,535	\$25,528	\$24,252	\$0
Facilities (e.g. rent, utilities)	\$67,583	\$68,271	\$64,858	\$0
Technology	\$179,340	\$135,312	\$128,546	\$0
Fees & Services	\$80,903	\$30,490	\$28,966	\$0
Other (Please submit document with a breakdown of other)	\$181,703	\$40,489	\$38,463	\$0
<b>Subtotal Operating Expenses</b>	<b>\$577,771</b>	<b>\$324,128</b>	<b>\$307,921</b>	<b>\$0</b>
Direct Client Aid	\$9,843,528	\$6,122,930	\$5,040,175	\$522,000
<b>Total Expenditures</b>	<b>\$14,322,136</b>	<b>\$9,659,707</b>	<b>\$8,400,113</b>	<b>\$550,000</b>

**All revenues, excluding revenues received from the City of Charlotte and Mecklenburg County:**

Program Specific Revenues	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants & Funding	\$3,793,027	\$3,417,393
Foundation Grants & Funding	\$1,162,370	\$1,141,763
Donor Contributions	\$4,633,209	\$3,768,357
Donor Contributions – In Kind	\$62,601	\$62,601
Other Revenue	\$8,500	\$10,000
<b>Total Revenues</b>	<b>\$9,659,707</b>	<b>\$8,400,114</b>
Less: City & County Revenues	(\$3,417,393)	(\$3,160,393)
<b>Total Revenues (Excluding City &amp; County Revenues)</b>	<b>\$6,242,314</b>	<b>\$5,239,721</b>

**Total funds received from Mecklenburg County, if applicable for each fiscal year:**

Fiscal Year	Client Aid	Operating	Total Funds
FY 2021 Prior Year	\$1,833,900	\$1,720,965	\$3,554,865
FY 2022 Current Budget	\$2,449,898	\$542,495	\$2,992,393
FY 2023 Projected (as requesting)	\$2,269,898	\$365,495	\$2,635,393

## **FY 2023 Financial Partner Agency Board of Directors**

### **Agency Name: Crisis Assistance Ministry**

**Melissa Agnew**

LPL Financial

**Tamera Green**

Viridian Marketing

**Mitchell Baldwin**

Mecklenburg Community Church

**Jarrod Jones**

Dream Key Partners

**Lucinda Blue**

Johnson C. Smith University

**Andrew Ladd**

Communities in Schools

**Stuart Christhlf (Vice Chair)**

Pamlico Capital

**Michael Martino**

Wells Fargo

**Lori Crowder**

Fifth Third Bank

**Alexis McDaniels**

Robinhood Financial

**Tanqueray Edwards (Secretary)**

JLL (Jones Lang LaSalle)

**Steve Newmark**

Roush-Fenway Racing

**Gina Esquivel**

Civic Canvas

**Stuart Proffitt**

Proffitt Dixon Partners

**Kati Everett**

Novant Health

**Lisa Quisenberry (Chair)**

Community Volunteer

**Quentin Fogan**

Bank of America-Merrill Lynch

**Nikhil Sawant (Treasurer)**

Foundation For The Carolinas

**Debra Foster**

Debra L. Foster, PLLC

**Ken Szymanski**

Retired, Community Volunteer

**Wendy Franklin**

Atrium Health

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FY 2023 Financial Partner Agency Summary  
Agency Name: **DreamKey Partners, Inc.**  
(formerly Charlotte Mecklenburg Housing Partnership)

**Scope of Service:**

DreamKey Partners, Inc. (DKP) is a nonprofit agency that provides affordable housing by administering comprehensive services that include pre- and post-homeownership counseling, delinquency prevention counseling, sale of houses, affordable mortgages and construction, and renovation of for sale and rental housing. In addition, DKP owns or is the general partner of 3,000 rental units. The agency assists other affordable housing providers through collaboration of resources and affordable financing. DKP primarily serves families earning up to 80 percent of annual median income (AMI). Since its inception, DKP has provided counseling to approximately 35,000 families, created 4,800 new homeowners, and developed and/or financed over 4,500 rental units, totaling more than \$787,000,000 in total investment of affordable housing.

**Mission Statement:**

DreamKey Partners, Inc. transform lives, communities, and what is possible through affordable housing.

**FY 2022:** \$1,921,000

- \$1,690,000 Affordable Housing [CDBG-\$1,300,000/Innovative-\$390,000]
- \$231,000 House Charlotte [HOME-\$173,250/Innovative-\$57,750]

**Supports:** Affordable housing activities, homeownership counseling, and down payment assistance

**FY 2023 Request:** \$2,241,000.

- \$1,960,000 Affordable Housing [CDBG-\$1,470,000/Innovative-\$490,000]
- \$281,000 House Charlotte [HOME-\$173,250/Innovative-\$107,750]

**Increase:** \$320,000

**Supports:** Expansion of affordable housing for low-and-moderate-income families and provide training for first-time homebuyers, foreclosure prevention, and digital training.

**Agency Established:** 1989

**Total Years Financial Partner with City of Charlotte:** 32 Years

**Population Served:**

DreamKey Partners serve individuals and families earning up to 80% of AMI. Only 13% of residents are above 80% AMI, while over 70% of residents are between 30%-60% AMI.

## Performance Objectives Report

### Corporate Scorecard Objective: Affordable Housing

Goal	FY 2023 Target	Mid-Year FY 2022	FY 2021 Actual
Number of affordable units constructed/acquired/rehabilitated	100	100	100

### Corporate Scorecard Objective: House Charlotte

Goal	FY 2023 Target	Mid-Year FY 2022	FY 2021 Actual
Increase the creation and retention utilization of "House Charlotte" program funding	250	62	248

## Overall Agency Budget

The overall agency and city program budgets included in this document were provided by the requesting agencies as supporting documentation in their FY 2023 Financial Partner applications.

Expenditures FY 2021 - FY 2023				
	FY2021 ACTUAL	FY 2022 BUDGET	FY 2023 PROJECTED BUDGET	FY2023 CITY REQUEST
<b>Personnel</b>				
Salaries	\$3,575,130	\$4,020,366	\$4,467,074	\$625,500
Merit	\$0	\$0	\$0	\$0
Benefits	\$795,470	\$859,141	\$953,517	\$145,500
<b>Subtotal Personnel Expenses</b>	<b>\$4,370,600</b>	<b>\$4,879,507</b>	<b>\$5,420,591</b>	<b>\$771,000</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$1,470,000	\$1,470,000	\$1,300,000	\$1,300,000
Communications (publishing, marketing)	\$70,500	\$268,540	\$272,000	\$0
Facilities (e.g. rent, utilities)	\$283,040	\$285,480	\$256,230	\$0
Office Supplies	\$34,850	\$34,850	\$34,500	\$0
Travel & Training	\$129,950	\$129,750	\$127,400	\$0
Technology (including monthly/annual fees for software, licenses, etc)	\$83,000	\$83,000	\$88,200	\$0
Other (Please submit document with a breakdown of other)	\$2,273,061	\$1,382,968	\$36,538,784	\$0
<b>Subtotal Operating Expenses</b>	<b>\$4,344,401</b>	<b>\$3,654,588</b>	<b>\$38,617,114</b>	<b>\$1,300,000</b>
<b>Total Expenditures</b>	<b>\$8,715,001</b>	<b>\$8,534,095</b>	<b>\$44,037,705</b>	<b>\$2,071,000</b>

All revenues, excluding revenues received from the City of Charlotte and Mecklenburg County:

Agency Revenues	FY 2022 CURRENT BUDGET	FY 2023 PROJECTED BUDGET
Government Grants & Funding	\$1,559,400	\$485,500
Foundation Grants & Funding	\$205,000	\$185,000
Donor Contributions	\$75,000	\$75,000
Service Fees	\$3,022,690	\$2,835,700
Other Revenue	\$1,388,773	\$1,401,775
<b>Total Revenues</b>	<b>\$6,250,863</b>	<b>\$4,982,975</b>

Amount of total funds received from Mecklenburg County, if applicable for each fiscal year.

Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Overall Program Budget – Affordable Housing

Expenses and revenue budget information for the specified program including all funding sources.

Expenditures FY 2021 - FY 2023				
	FY 2021 ACTUAL	FY 2022 BUDGET	FY 2023 PROJECTED BUDGET	FY 2023 CITY REQUEST
<b>Personnel</b>				
Salaries	\$3,371,940	\$3,626,688	\$4,121,683	\$399,300
Merit	\$0	\$0	\$0	\$0
Benefits	\$748,670	\$754,153	\$866,641	\$90,700
<b>Subtotal Personnel Expenses</b>	<b>\$4,120,610</b>	<b>\$4,380,841</b>	<b>\$4,988,324</b>	<b>\$490,000</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$1,470,000	\$1,470,000	\$1,300,000	\$1,300,000
Communications (e.g. , publishing, marketing)	\$69,300	\$267,340	\$272,000	\$0
Facilities (e.g. rent, utilities)	\$246,440	\$248,880	\$219,630	\$0
Office Supplies	\$30,650	\$30,650	\$30,900	\$0
Travel & Training	\$129,950	\$129,950	\$127,400	\$0
Technology	\$83,000	\$83,000	\$88,200	\$0
Other (Please submit document with a breakdown of other)	\$2,270,621	\$1,373,928	\$36,529,244	\$0
<b>Subtotal Operating Expenses</b>	<b>\$4,299,961</b>	<b>\$3,603,548</b>	<b>\$38,567,374</b>	<b>\$1,300,000</b>
<b>Total Expenditures</b>	<b>\$8,420,571</b>	<b>\$7,984,389</b>	<b>\$43,555,698</b>	<b>\$1,90,000</b>

All revenues, excluding revenues received from the City of Charlotte and Mecklenburg County:

Program Specific Revenues	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants & Funding	\$485,500	\$27,768,300
Foundation Grants & Funding	\$185,000	\$112,500
Donor Contributions	\$75,000	\$75,000
Service Fees	\$2,835,700	\$4,800,280
Other Revenue	\$1,401,775	\$1,413,432
<b>Total Revenues</b>	<b>\$4,982,975</b>	<b>\$34,169,512</b>

Total funds received from Mecklenburg County, if applicable:

Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Overall Program Budget – House Charlotte

Expenses and revenue budget information for the specified program including all funding sources.

Expenditures FY 2021 - FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$203,190	\$393,678	\$345,391	\$226,200
Merit	\$0	\$0	\$0	\$0
Benefits	\$46,800	\$104,988	\$86,876	\$54,800
<b>Subtotal Personnel Expenses</b>	<b>\$249,990</b>	<b>\$498,666</b>	<b>\$432,267</b>	<b>\$281,000</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$1,200	\$1,200	\$0	\$0
Facilities (e.g. rent, utilities)	\$36,600	\$36,600	\$36,600	\$0
Office Supplies	\$4,200	\$4,200	\$3,600	\$0
Travel & Training	\$0	\$0	\$0	\$0
Technology (including annual/monthly fees)	\$0	\$0	\$0	\$0
Other (Please submit document with a breakdown of other)	\$2,440	\$9,040	\$9,540	\$0
<b>Subtotal Operating Expenses</b>	<b>\$44,440</b>	<b>\$51,040</b>	<b>\$49,740</b>	<b>\$0</b>
<b>Total Expenditures</b>	<b>\$294,430</b>	<b>\$549,706</b>	<b>\$482,007</b>	<b>\$281,000</b>

**All revenues, excluding revenues received from the City of Charlotte and Mecklenburg County:**

<b>Program Specific Revenues</b>	<b>FY 2022 Current Budget</b>	<b>FY 2023 Projected Budget</b>
Government Grants & Funding	\$0	\$0
Foundation Grants & Funding	\$0	\$0
Donor Contributions	\$0	\$0
Service Fees	\$0	\$0
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$0</b>	<b>\$0</b>

**Total funds received from Mecklenburg County, if applicable:**

<b>Fiscal Year</b>	<b>Total Funds</b>
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## **Board of Directors**

**Ms. Nicole Baldon** (2020-2022)

**Ms. Astrid Chinnos** (2021-2023)

**Ms. Elyse Dashew** (2020-2022)

**Mr. Fred Dodson, Jr.** (Assistant Secretary)

**Mr. David R. Finnie, CPA** (2022-2024)

**Honorable Linwood O. Foust** (2021-2023)

**Mr. Malcolm Graham** (2022-2025)

**Mr. Kevin Granelli** (2020-2022)

**Mr. Rickey Hall** (2022-2024)

**Ms. Brenda Hayden** (2022-2025)

**Ms. Jessica Beil Hindman** (2022-2024)

**Mr. Chris Jackson** (2020-2022)

**Mr. Dave Kautter** (2021-2023)

**Mr. Raymond (Raki) McGregor** (2020-2022)

**Ms. Jacqueline O'Garrow** (2020 – 2022) (Chair)

**Ms. Julie A. Porter** (President)

**Mr. Winston A. Robinson** (2020-2022)

**Mr. Ken Schor** (2020-2022)

**Mr. James R. Simpson** (2022-2024) (Vice Chair)

**Mr. Joaquin Soria** (2022-2025)

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## FY 2023 Financial Partner Agency Summary

Agency Name: **Local Initiatives Support Corporation**

(Charlotte Office)

### **Scope of Service:**

Local Initiatives Support Corporation (LISC) is a nonprofit agency that is working with the Charlotte community to develop and build capacity of local community-based non-profits that directly serve minority communities. By development of a comprehensive strategy, that includes work in health, safety, education, and recreation initiatives, LISC operates as the fund manager for the \$53 million Charlotte Housing Opportunity Investment Fund initiative that invests directly into affordable housing for low to moderate income individuals.

LISC Charlotte's projects since March 2019 includes but is not limited to the: development of 1700 affordable housing units, deployed \$790k in City of Charlotte's CDBG funding for micro-enterprises to 79 businesses, secured approximately 28.6M of funding from financial institutions for neighborhood revitalization, small business and homeownership initiatives, and a \$25K commitment to Historic West End Partners (HWEPP) that provided Capacity Mapping modules for execution of a strategic plan. In addition, LISC continues to provide technical assistance to non-profits and stakeholders on housing and community initiatives.

### **Mission Statement:**

Local Initiatives Support Corporation (LISC) works government, foundations, for-profit companies, residents and local community organizations expertise to strengthen existing alliances, build new alliances, develop leadership, increase collaborative work and equip talent in underinvested communities the skills and credential to compete successfully for quality income and wealth opportunities. LISC also invests in minority small businesses, housing and other underserved communities.

**FY 2022:** \$200,000

**Supports:** Funding supported local office operations; i.e.: staff, rent, operating costs

**FY 2023 Request:** \$200,000

**Increase:** \$0

**Supports:** Funding will support local office operations; i.e.: staff, rent, operating costs

**Agency Established:** 2019 - Local office established

**Total Years Financial Partner with City of Charlotte:** 3 Years

### **Population Served:**

LISC aspires to increase participation of Black, Indigenous, Latinx, and other people of color in the

decision-making and works with partners that reflect the communities where we work. LISC amplifies the voices of those most impacted by inequities, and include them in the creation and implementation of programs and initiatives.

## Performance Objectives Report

### Corporate Scorecard Objective: Support Small Businesses

Goal	FY 2023 Target	Mid-Year FY 2022	FY 2021 Actual
Provide technical assistance and/or lending services to small businesses through BDOs. Continue to build out pilot for TA to small businesses post loan/grant closings on City of LISC loans or grants to assist in business sustainability (THRIVE)  ▪ Intake 150 businesses	150	80	155
Continue to build out and implement pilot with City of Charlotte for City's façade improvement program  ▪ Identify and LISC approval on 5 new small businesses	5	2	Develop façade program pilot with LISC and City
Continue to oversee, align, leverage and implement the City's loan into commercial projects  ▪ Partner with City Economic Development to identify 2 commercial loan opportunities in the City's commercial project pipeline to leverage LISC/City product (recoverable grant)	2	2	2

### Corporate Scorecard Objective: Support Small Businesses

Goal	FY 2023 Target	Mid-Year FY 2022	FY 2021 Actual
Continue to partner with the City as fund manager for the CHOIF I. Fundraise for CHOIF II.  ▪ Fund 1700 units of affordable housing under CHOIF I	1700	1300	1214
Support organizations that provide housing services  ▪ Support housing organizations	3	N/A	N/A



## Overall Agency Budget

Expense and revenue budget information for entire agency including all programs and funding sources.

Expenditures FY 2021 - FY 2023				
	FY2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY2023 City Request
<b>Personnel</b>				
Salaries	\$527,292	\$588,196	\$605,841	\$123,518
Merit	\$0	\$0	\$0	\$0
Benefits	\$194,164	\$268,964	\$277,034	\$56,482
<b>Subtotal Personnel Expenses</b>	<b>\$721,456</b>	<b>\$857,160</b>	<b>\$882,875</b>	<b>\$180,000</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$2,685	\$4,811	\$4,955	\$0
Communications (publishing, marketing)	\$1,500	\$800	\$824	\$0
Facilities (e.g. rent, utilities)	\$61,065	\$53,207	\$54,803	\$20,000
Office Supplies	\$26,232	\$23,927	\$24,645	\$0
Travel & Training	\$0	\$2,719	\$2,801	\$0
Technology (including monthly/annual fees for software, licenses, etc)	\$0	\$0	\$0	\$0
Other (Please submit document with a breakdown of other)	\$0	\$0	\$0	\$0
<b>Subtotal Operating Expenses</b>	<b>\$91,482</b>	<b>\$85,464</b>	<b>\$88,028</b>	<b>\$20,000</b>
<b>Total Expenditures</b>	<b>\$812,938</b>	<b>\$942,624</b>	<b>\$970,903</b>	<b>\$200,000</b>

All revenues, excluding revenues received from the City of Charlotte and Mecklenburg County:

Agency Revenues	FY 2022	FY 2023
	Current Budget	Projected Budget
Government Grants & Funding	\$955,000	\$1,002,750
Foundation Grants & Funding	\$300,000	\$315,000
Donor Contributions	\$2,415,000	\$2,535,750
Service Fees	\$405,000	\$425,250
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$4,075,000</b>	<b>\$4,278,750</b>

Total funds received from Mecklenburg County, if applicable for each fiscal year.

Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Overall Program Budget

Expenses and revenue budget information for the specified program including all funding sources.

Expenditures FY 2021 - FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
<b>Personnel</b>				
Salaries	\$527,292	\$588,196	\$605,841	\$123,518
Merit	\$0	\$0	\$0	\$0
Benefits	\$194,164	\$268,964	\$277,034	\$56,482
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Other (Please submit document with a breakdown of other)	\$0	\$0	\$0	\$0
<b>Subtotal Operating Expenses</b>	<b>\$91,482</b>	<b>\$85,464</b>	<b>\$88,028</b>	<b>\$20,000</b>
<b>Total Expenditures</b>	<b>\$812,938</b>	<b>\$942,624</b>	<b>\$970,903</b>	<b>\$200,000</b>

All revenues, excluding revenues received from the City of Charlotte and Mecklenburg County:

Program Specific Revenues	FY 2022 Current Budget	FY 2023 Projected Budget
Government Grants & Funding	\$955,000	\$1,002,750
Foundation Grants & Funding	\$300,000	\$315,000
Donor Contributions	\$2,415,000	\$2,535,750
Service Fees	\$405,000	\$425,250
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$4,075,000</b>	<b>\$4,278,750</b>

Total funds received from Mecklenburg County, if applicable for each fiscal year:

Fiscal Year	Total Funds
FY 2021 Prior Year	\$0
FY 2022 Current Budget	\$0
FY 2023 Projected (as requesting)	\$0

## Local Initiatives Support Corporation (LISC)

### Board of Directors

**Robert E. Rubio** (Chair)

Former Secretary of the U.S. Treasury  
Co-Chairman  
Council of Foreign Relations  
New York, NY (1999 – Current)

**Lisa Cashin** (Vice Chair)

Former Chief Credit Officer, LISC  
New York, NY (2007 – Current)

**Lisa Glover**

Interim CEO, LISC  
Former Executive Vice President, U.S. Bank  
Milwaukee, WI (2010 – Current)

**Kathy Merchant** (Acting Chair, Audit  
Committee) President, Kathy Merchant LLC  
Senior Fellow, Strive Together  
Cincinnati, OH (2012 – Current)

**David Hess** (Chair, Investment Committee)  
Partner, Centerview Partners  
New York, NY (2018 – Current)

**Nilda Ruiz** (Chair, Portfolio Review Committee)  
President & CEO  
Asociación Puertorriqueños en Marcha  
Philadelphia, PA (2012 – Current)

**Nicole Arnaboldi**

New York, NY (2020 – Current)

**Gregory Belinfanti**

Senior Managing Director  
One Equity Partners  
New York, NY (2010 – Current)

**Ellen Gilligan**

President & CEO  
Greater Milwaukee Foundation  
Milwaukee, WI (2013 – Current)

**Zack Boyers**

Chairman & CEO  
USBancorp Community Development  
St. Louis, MO (2020 – Current)

**Audrey Choi**

Chief Marketing Officer & Chief  
Sustainability Officer – Morgan  
Stanley New York, NY (2011 –  
Current)

**Michelle de la Uz**

Executive Director  
Fifth Avenue Committee  
Brooklyn, NY (2010 – Current)

**Sally Durdan**

New York, NY (2013 – Current)

**Tom Espinoza**

President & CEO  
Raza Development Fund  
Phoenix, AZ (2011 – Current)

**Gregory Fairchild**

Isidore Horween Associate Research  
Professor of Business Administration  
University of Virginia  
Charlottesville, VA (2018 – Current)

**Karen Fang**

Head of Global Sustainable Finance  
Bank of America  
New York, NY (2020 – Current)

**Rey Ramsey**

CEO & Managing Partner  
Centri Capital  
Washington, DC (2002 – Current)

**Calvin W. Grannum**

President

Bedford Stuyvesant Restoration Corp.  
Brooklyn, NY (2001 – Current)

**Lisa Hasegawa**

Regional Vice President, Western Region  
NeighborWorks America  
Los Angeles, CA (2015 – Current)

**Alisahah Jackson, MD**

System Vice President, Innovation &  
Policy Population Health-CommonSpirit  
Health San Francisco, CA (2020 – Current)

**Randy Oostra**

President & CEO

ProMedica

Toledo, OH (2018 – Current)

**Richard “Rip” Rapson**

President & CEO

The Kresge Foundation  
Troy, MI (2006 – Current)

**Curtis Reed, Jr.**

Managing Director & Region Manager  
Chase  
Chicago, IL (2021 – Current)

**Jerry Rickett**

President & CEO

Kentucky Highlands Investment Corp.  
London, KY (2016 – Current)

**Local Initiatives Support Corporation**  
**Local Advisory Committee Member List**

<b>Name</b>	<b>Title</b>	<b>Organization</b>	<b>Sector</b>
<b>Anne Marie DeCatsye, Esq.</b>	CEO	Canopy Realtor Assoc.	Housing
<b>Arrington Mixon</b>	Board & Investment Committee Member	Foundation for the Carolinas	Philanthropy
<b>Holly Welch Stubbing</b>	Executive VP/House Counsel	Foundation for the Carolinas	Philanthropy
<b>Charles Thomas</b>	Charlotte Program Director	Knight Foundation	Philanthropy
<b>Dena Diorio</b>	County Manager	Mecklenburg County	Government
<b>Denise Alexander</b>	SVP, Executive Director Regional Foundation & CDC	Retired, Wells Fargo Regional Foundation	Philanthropy
<b>Natalie Brown</b>	Director, Corporate Citizenship	Ally Financial	Financial Services
<b>John Stokes</b>	SVP, CRS/Community Development	Truist	Financial Services
<b>Erin Branstrom</b>	Chief of Staff	Barings	Financial Services
<b>Jada Grandy-Mock (Vice Chair)</b>	SVP, Chief Corporate Community & Economic Development Officer	Fifth Third Bank	Financial Services
<b>Jim Burbank</b>	President/CEO	Retired, Saussy Burbank/JCB Urban	Housing
<b>Kathy Cummings</b>	SVP, Homeownership Solutions & Strategic Relationships	Bank of America	Financial Services Housing
<b>Ken Schorr</b>	Executive Director	Charlotte Center for Legal Advocacy	Legal Services
<b>Keva Walton</b>	CEO	Mecklenburg County ABC Board	Economic Development
<b>Kelly Flannery</b>	CFO	City of Charlotte	Government
<b>Matt Martin</b>	SVP	Federal Reserve Bank	Financial Services
<b>Pedro Gatica</b>	VP, Strategic Initiatives Manager	U.S. Bank	Financial Services
<b>Rodrick Banks</b>	Senior Community Relations Consultant, Social Impact & Sustainability	Wells Fargo	Financial Services
<b>Steven Cohen</b>	Advocate/Entrepreneur	Greenspon Center for Peace & Social Justice	Community Advocate
<b>Terik Tidwell</b>	Managing Director	Johnson C. Smith University	Higher Education HBCU
<b>Tameka O'Neal</b>	Senior Director, Credentialing & Medical Staff Ops	Novant Health	Health
<b>Rocio Gonzalez</b>	Executive Director	The Women's Business Center of Charlotte	Financial Services