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# FY 2022 FINANCIAL PARTNER 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 2022 Financial Partner applications.*

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Agency Name	Adopted FY 2021 Funding Amount	FY 2022 Funding Request	Page No.
<b>Financial Partners General Fund</b>			
<i>Arts and Science Council</i>	\$3,190,823	\$4,000,000	<b>1</b>
<i>Bengali Women's Forum Corp</i>	N/A	\$10,000	<b>14</b>
<i>Charlotte Regional Business Alliance</i>	\$164,085	\$166,553	<b>21</b>
<i>Community Building Initiative</i>	\$50,000	\$50,000	<b>25</b>
<i>Historic West End Partners</i>	N/A	\$108,842	<b>29</b>
<i>MeckEd</i>	N/A	\$120,000	<b>32</b>
<i>Mental Health America of Central Carolinas</i>	N/A	\$50,000	<b>37</b>
<i>My Brother's Keeper CLT-Meck</i>	\$50,000	\$200,000	<b>44</b>
<i>Safe Alliance</i>	\$397,038	\$406,682	<b>49</b>
<i>TreesCharlotte</i>	\$100,000*	\$150,000	<b>55</b>
<i>UNC Charlotte Urban Institute/Institute for Social Capital</i>	N/A	\$250,000	<b>60</b>
<i>Women's Business Center</i>	\$50,000	\$50,000	<b>63</b>
<b>Dedicated Revenue</b>			
<i>Charlotte Center City Partners</i>	\$5,810,182	\$6,201,323	<b>73</b>
<i>Charlotte Regional Visitors Authority</i>	\$17,546,420	\$18,072,814	<b>76</b>
<i>Charlotte Regional Visitors Authority - Film Commission</i>	\$150,000	\$150,000	<b>80</b>
<i>University City Partners</i>	\$1,090,489	\$1,121,435	<b>84</b>
<b>Housing and Neighborhood Services</b>			
<i>Carolina CARE Partnership</i>	\$2,860,489	\$2,913,407	<b>93</b>
<i>Crisis Assistance Ministry</i>	\$425,000	\$525,000	<b>100</b>
<i>DreamKey (formerly Charlotte Mecklenburg Housing Partnership)</i>	\$2,091,000	\$2,241,000	<b>107</b>
<i>Out of School Time Partners</i>	\$852,000	\$482,000	<b>117</b>

\*TreesCharlotte was funded in FY 2021 from the Pay-As-You-Go Fund

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## GENERAL FUND

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## FY 2022 Financial Partner Agency Summary

### Agency Name: Arts and Science Council

#### Scope of Service:

Designated in 1975 by the City of Charlotte and Mecklenburg County as their Office of Cultural Affairs to serve the community's residents and visitors, ASC is a Local Arts Agency responsible for promoting, supporting and developing the local creative ecosystem. ASC has comprehensive oversight of the cultural community through community-wide planning, grant making, public art, advocacy, capacity building, research and dissemination.

- Funder - ASC works to ensure all residents and visitors have access to high-quality arts, science and history experiences by investing in creative individuals and cultural organizations. The combination of public and private resources allows us to maximize impact and aligns with our focus on cultural equity and investing in historically under-resourced communities.
- Lead Advocate - ASC advocates for engagement with and support of the regional cultural community, leveraging support strategically and growing the capacity of creators, leaders and partner organizations both large and small.
- Resource Hub - ASC serves as a resource hub for creative individuals and for arts, science and history organizations, enabling them to adapt to 21st-century trends in philanthropy, demographics, and resident participation and engagement.

#### Mission Statement:

Ensuring access to an excellent, relevant and sustainable cultural community for the Charlotte-Mecklenburg Region

**FY 2021:** \$3,190,823

**Supports:** Investment in Charlotte's cultural sector through ASC's grant programs including: Operating Support Grants (unrestricted investments in the general operations, administration, and programs for established and emerging cultural organizations), Cultural Vision Grants (increase reach into community and Charlotte neighborhoods, including investment in creative individuals), and Technical Assistance/Professional Development Grants (support capacity building for local cultural organizations); expanding support for local individual artists; expanding access to cultural experiences for all residents and visitors to the Charlotte region.

**FY 2022 Request:** \$4,000,000

**Increase:** \$809,177

**Supports:** The Cultural Vision Grant (CVG) program, which addresses each of Charlotte's strategic priorities and receives more and more proposals each year, is currently only funded at \$300,000, an amount that has remained flat since the program's inception in FY17 despite our City's rapid population growth and increased demand from program applicants. The CVG program supports diverse projects and paves the way to an increasingly diverse group of Operating Support (OS)



partners. In FY21 alone, ASC brought five organizations into the OS program, all of which had previously been project grant/CVG partners. More funding for project grants results in more organizations in Charlotte that are thriving, growing, and becoming sustainable cultural institutions able to serve the city's residents and visitors.

Similarly, our Fellowships expanded last year from solely Creative Renewal Fellows to also including Emerging Creators, in recognition that investing in evolving creatives at a pivotal moment helps to retain and grow Charlotte's pool of sustainable creative talent. We are currently only able to fund four awards to emerging creative individuals and 11 fellowships in total, but the program has attracted a great deal more interest (87 applications in FY21) and can grow meaningfully with increased support.

ASC continues to collect data on the impact of COVID-19 for our cultural partner organizations, who are seeing revenue losses that further deepen their need for unrestricted support in the coming fiscal year. Conservatively estimated, actual revenue losses from COVID-19, across cultural partner organizations, currently total \$29.9 million through December of 2020, with further revenue losses (related to COVID-19) from January 1 to June 30 of 2021 projected at \$19.8 million.

In addition, ASC is currently granting below what our cultural partners are eligible for in Operating Support, based on current program criteria. In FY21, ASC began using a formula to improve objectivity and transparency in awarding OS grants. The formula considers the maximum eligible grant (based on each organization's budget size), the scores an organization receives in the rigorous panel review process, and total funding available. Based on this formula, the 37 organizations that receive unrestricted support would have been eligible for a total of \$6.9 million in Operating Support in FY21. However, ASC could only award \$4.3 million (including the equity supplement further supporting organizations whose primary intentions, practices and mission are by, for and about African, Latinx, Asian, Arab and Native American artists, cultures and communities), reflecting a decrease of 26% overall from FY20. With additional funding, we hope to award much needed additional unrestricted operating support for existing cultural partners throughout the community as well as continue to build a pipeline that welcomes more emerging and diverse organizations, that reflect the changing population, into this portfolio.

In sum, across grants, we have more eligible, high quality proposals for programming than we are able to fund at current levels. Increased funding from the City of Charlotte will empower ASC to expand and fulfill grants that align with a multitude of community goals; ASC's grant applicants bring profound creativity and capacity that, if backed with adequate funding, can ignite a powerfully transformative effect on our community.

**Agency Established:** 1958

**Total Years Financial Partner with City of Charlotte:** 41 Years

**Population Served:** ASC serves diverse populations as we believe all residents of and visitors to Charlotte should have access to arts, science and history experiences. Driven by our commitment to cultural equity, we work to ensure arts, science and history program offerings are accessible, relevant and purposefully designed.

In the first three quarters of FY20, ASC funding supported the delivery of approximately 11,767 programs for a combined total of 1,875,924 participant experiences across Mecklenburg County. Following the onset of the public health crisis, many grantees pivoted to providing cultural



programs on a digital platform. The Operating Support partners alone provided nearly 350,000 digital and socially distanced activities in the last quarter of FY20.

ASC programming and grant projects serve communities across the city, including:

- Patrons of the 37 small, mid-sized and large organizations that rely on ASC Operating Support grants (such as Arts+, Blumenthal Performing Arts, Bechtler Museum of Modern Art, The Carolinas Latin Dance Company, Clayworks, Discovery Place, Inc., the Harvey B. Gantt Center for African-American Arts + Culture, JazzArts Charlotte, The Mint Museum of Art, Three Bone Theatre, and many more).
- Children, youth, adults, seniors and families attending community festivals, events, and programs - including via a significant and coordinated shift to virtual community programming in response to the pandemic.
- Local creative individuals, both emerging and established, with diverse disciplines and ambitious cultural visions.
- Professionals seeking inclusive nonprofit board training.
- Cultural sector organizations and individuals pursuing educational opportunities in capacity building and leadership development.

The work of ASC serves Charlotteans through each of the five City Council strategic priorities:

- **Workforce and Business Development:** ASC's comprehensive role in supporting Charlotte's creative sector boosts regional business climate development by attracting businesses and driving significant economic impact in our community. The regional draws of cultural assets, particularly that of organizations in City-owned facilities, play a critical role in community identity and tourism for the City, bringing in visitors and generating event-related spending. Additionally, ASC builds the workforce capacity of arts, science, and history organizations and creative individuals to sustain themselves by providing professional and volunteer development, audience development, and technical assistance to aid in adaptive change and meeting challenges of new economic realities.
- **Transportation, Planning and Environment:** ASC intentionally funds organizations and projects that accomplish the important goals of encouraging a connected city, creating great places, protecting and enhancing the city's natural and historic environment, and working towards a sustainable future. ASC-funded projects and creative individuals encourage a city of Charlotteans that connect with each other, their shared spaces, and their impact on those spaces.
- **Safe Communities:** ASC understands that arts, science and history are tools with which safe communities can be fostered and grown. Transformative expression through cultural programming can heal and mend, can rehabilitate and fortify, can teach and prepare, and can interrupt and prevent patterns of violence or harm. ASC's Cultural Vision Grant program invests in projects that use cultural tools to accomplish these valuable goals.
- **Great Neighborhoods:** ASC directly supports neighborhood-based initiatives through project grants and services (reflecting changing demographics and under-invested populations) that strengthen resident relationships and preserve the authentic character of neighborhoods and communities.
- **Well-Managed Government:** ASC partners with a national peer network of cultural grant makers to model best practices and ensure decisions about the funds we steward are consistently made in a transparent, accountable and inclusive manner. In allocating Operating Support grants, two panels – one composed of national peer organizations from across the U.S. and one composed of local financial professionals with nonprofit expertise – convene to assess financial health, programmatic vitality, leadership strength, and

sustainability for eligible organizations. For project grants, ASC assembles panels of community members that intentionally model geographic, race, gender, and discipline diversity. Throughout these processes, ASC staff members build relationships with community groups to raise awareness of funding opportunities, work closely with applicants to provide coaching and counsel, build grant writing capacity, and maximize community outcomes.

## Objectives Report

### Corporate Scorecard Objectives: Strengthen Neighborhoods and Promote Economic Opportunity

Goal	FY 2021 Target	FY 2021 Mid-Year	FY 2020 Actual
Increase number of grant funded organizations that increase access to African-American, Asian, Latino, and Native American focused arts, science, and history/heritage offerings for the entire community.	At least 40% of grantees will be outside Center City Charlotte and represent or create access specifically for African-American, Asian, Latino, and Native American populations.	In 5 years, ASC has increased the number of Operating Support (OS) recipients from 32 to 37. This growth reflects an increase in the number of grantees outside Center City from 20 to 25, and the number of organizations whose primary intentions, practices, and mission are by, for, and about African, Latinx, Asian, Arab, Native American artists, cultures, and communities from 4 to 6. We credit this trend to an increasingly diverse portfolio of project grantees through the innovative Cultural Vision Grant program and extending OS grants to organizations with operating budgets under \$300,000 annually, both introduced in 2016. The new organizations have received several rounds of project support through the CVG program prior to applying for OS. We anticipate that the increasing diversity of the applicant pool in	In addition to ASC staff's efforts to increase representation of historically under resourced communities and geographic diversity in our grant pool, we have shifted our Operating Support grant process for FY21 to a formula that improves objectivity and transparency, and, before applying the formula, set aside 2% of the OS budget (\$86,000 of \$4.3 million) as an equity supplement for the grants of organizations whose primary intentions, practices, and mission are by, for, and about African, Latinx, Asian, Arab and Native American artists, cultures and communities.

Goal	FY 2021 Target	FY 2021 Mid-Year	FY 2020 Actual
		the CVG program will lead to an increasingly diverse portfolio of organizations receiving OS.	
Provide support through Cultural Vision Grants for high-quality and high-impact cultural programming that is designed to build community or increase relevance and innovation.	Equitable distribution of investments to meet goals of building community and increasing relevant and innovative cultural expression.	ASC has distributed a combined \$297,113 to 51 groups and individuals for cultural projects that build community and increase relevance and innovation. 50% of the projects are led by and/or serve communities that the philanthropic community has historically under resourced, including African, Latinx, Asian, Arab and Native American (ALAANA), LGBTQ and Disability communities.	ASC has completed our Cultural Vision Grant award process for FY20, awarding \$310,705 in Cultural Vision Grants to 44 organizations and 15 artists. 35 of these awards are aligned to our goal of building community and 24 are aligned to our goal of increasing relevance and innovation.
Increase the applicant pool for Cultural Vision Grant project investment to include new and emerging community-based arts and culture organizations and individual artists.	ASC has seen an increase in applicants each year and anticipates that trend will continue in FY21.	For FY21, 33% of Cultural Vision Grant (CVG) grantees are first-time CVG recipients. These grants fund projects that build community and increase relevance and innovation; our Grants & Services team has successfully assisted multiple former CVG recipients in applying for Operating Support and joining ASC's group of cultural partner organizations, and the team is actively continuing to grow this pipeline of support for new and emerging community-based	In addition to funded Cultural Vision Grants, new \$5,000 Emerging Creators Fellowships were awarded to four creatives in FY20.

Goal	FY 2021 Target	FY 2021 Mid-Year	FY 2020 Actual
		arts and culture organization. To date, in FY21, ASC has received 68 CVG applications totaling a requested \$550,669 and has been able to fund 51 of those applicants at a total level of \$297,113.	
Maintain the geographic diversity of funded programs to more accurately reflect population density.	Projects in each of the city's 7 council districts	ASC is actively working to maintain and increase geographic diversity of funded programs; in FY21 we have had grant recipients in each of the 7 City districts, and have organized and shared with each geographic Advisory Council current grants in their area from each program (Creative Renewal Fellowship, Cultural Vision Grants, Emerging Creators Fellowship, Mecklenburg Creative Resiliency Fund, Operating Support, Artist Support Grants, and Technical Assistance Grants) by geography using recipient zip-codes. In addition, ASC's Culture Blocks program and several cultural partners continue to offer virtual programming that is available to participants from all geographies.	Through the Culture Blocks program, ASC has continued collaborations across the City of Charlotte and Mecklenburg County to activate community spaces with cultural activity for all residents, including in one new geography (North Meck. block). In the final quarter, this included a shift to virtual delivery for several programs to preserve accessibility while residents could not meet in person.

Goal	FY 2021 Target	FY 2021 Mid-Year	FY 2020 Actual
Engage a diverse and expert group of panelists to review grant applications and advise the staff and board on grant awards.	Recruit community leader and industry expert volunteers to serve as grant panelists for each opportunity.	ASC continues to facilitate the recruitment of community leaders and industry expert volunteers to serve as grant panelists. For example, in grant making for unrestricted operating support: before funds are distributed, each organization must complete a thorough application and review process that culminates in a rigorous, three-panel review consisting of: 1) Financial Review – Chaired by an ASC Board member and comprised of professional auditors and financial experts to determine each organization's financial viability. 2) Peer Panel – led by the Chair of ASC's Community Investment Committee, this panel reviews programmatic vitality, leadership strength and organizational stability. The panel includes senior leaders at local arts agencies nationwide. 3) Community Investment Committee – ASC program staff presents results of the Financial Review and	ASC continues to match community leaders and industry expert volunteers to serve as grant panelists. In addition, for Operating Support grants, ASC is now using a formula to improve objectivity and transparency in awarding operating grants to organizations. The formula considers the maximum eligible grant (based on each organization's budget size), the scores an organization received in the panel review process and total funding available.

Goal	FY 2021 Target	FY 2021 Mid-Year	FY 2020 Actual
		Peer Panels to the Committee, along with recommended funding based on performance, maximum award eligibility and overall funds available in the granting pool. The committee reviews the proposed funding formula and recommends allocations to the ASC Board for final approval.	
Engage a diverse and expert group of panelists to review grant applications and advise the staff and board on grant awards	Published annually in May/June.	ASC's Community Priorities Survey, conducted this spring, gathered input from over 1,900 residents reflecting a wide range of community voices (racial, ethnic, age, socioeconomic, geography, etc.). Top community priorities found include support for nonprofit arts, science, and history organizations to ensure sustained, high-quality programs and community outreach; annual field trips; programs that celebrate diverse cultures and neighborhoods; using arts, science, and history programming to address complex community issues; and increased affordability.	Planning is currently underway for UNC Charlotte Urban Institute's Cultural Life Survey, which will be conducted in spring of 2021.
Continue work with ASC Advisory Councils - North/West, Central, South/East, Private Sector, and Cultural Sector - to increase	ASC Advisory Councils meet independently at least two times annually and once annually with ASC Board.	ASC's Advisory Councils have met twice so far this fiscal year, including a joint meeting/Implicit Bias and Cultural Equity workshop with the	Advisory Councils met in February and again virtually in April, hearing updates on ASC Community Investment and Community

Goal	FY 2021 Target	FY 2021 Mid-Year	FY 2020 Actual
citizen input and guidance in development of the cultural sector.		Board of Directors in October, and individual Council meetings in December with CARES, Culture Blocks, and Public Art updates and Appreciate Interview discussions for strategic planning.	Engagement efforts and participating in discussions on challenges and opportunities in each of their councils.
Increase awareness and visibility for cultural programming through tracking number of visitors to CharlotteCultureGuide.com and number of subscribers to Culture Picks weekly email.	<p>1. 300,000 unique visitors to CharlotteCultureGuide.com</p> <p>2. 16,000 subscribers to Culture Picks</p>	<p>CharlotteCultureGuide.com had 21,106 sessions during July-December 2020, which is a 66.38% decline from this time last year. That 66% decline shows the impact of the pandemic. When COVID hit, we had to quickly scale down the site to one page that focused on virtual events. Once restrictions opened and museums were able to open, we brought the site back and now highlight events that are in-person, hybrid and virtual. We had 15,607 CulturePicks! subscribers as of Dec. 31, 2020.</p>	<p>216,277 visitors to CharlotteCultureGuide.com</p> <p>15,791 subscribers to CulturePicks!</p>
Maintain investment of Operating Support grants.	ASC expects to continue to fund the 37 current Operating Support grantees in FY21. ASC staff will continue to collect feedback and data from partners on their innovative programming, relevance in the community, and long-term sustainability.	ASC's first round of investments providing unrestricted dollars for the general administration, operations and programs of 37 arts, science and history organizations totaled \$4.3 million for FY21. The improved investment approach,	<ul style="list-style-type: none"> <li>• FY20 Operating Support grants were fully distributed and recipient feedback and data was collected.</li> <li>• In learning from FY20 Operating Support and community feedback, ASC has improved the OS granting process heading into FY21. Grant amounts will be</li> </ul>

Goal	FY 2021 Target	FY 2021 Mid-Year	FY 2020 Actual
		<p>incorporating our funding formula and Equity Supplement, has so far resulted in:</p> <ul style="list-style-type: none"> <li>• 60% increase in the overall allocation for organizations with an annual budget of \$300,000 or less.</li> <li>• 30% increase in the overall allocation for organizations with an annual budget of \$300,000 to \$1 million.</li> <li>• 33% decrease in the overall allocation for organizations with an annual budget of \$1 million or more.</li> <li>• 33% increase in funding for ALAANA organizations over what would have been awarded prior to the equity supplement.</li> </ul>	<p>determined using a formula that considers the maximum eligible grant (based on each organization's budget size), panel review scores, and total funding available.</p> <ul style="list-style-type: none"> <li>• ASC OS goals moving forward are to (1) Improve equity and transparency by providing supplemental funding for ALAANA Organizations and using a formula to calculate grant awards; and (2) minimize cuts to no more than 45 percent of FY20 levels.</li> </ul>
<p>Offer a rigorous portfolio of training opportunities for Charlotte-area creative and nonprofit practitioners working in Charlotte-Mecklenburg cultural organizations, focusing on themes of:</p> <ul style="list-style-type: none"> <li>-Diversity, Equity, and Inclusion</li> <li>-Board Training and Development</li> <li>-Staff Capacity Building</li> <li>-Grant writing for cultural organizations and creative individuals.</li> </ul>	<p>Create training opportunities for established and emerging nonprofit practitioners focused on developing leadership in the cultural sector</p> <p>ASC staff will continue to identify opportunities through feedback from grant panels to support creative individuals and cultural organizations with workshops and trainings.</p>	<p>The ongoing public health crisis has dramatically decreased ASCs ability to offer workshops and training. The Grants &amp; Services team has pursued opportunities to partner with organizations to deliver workshops and training. We have prioritized info sessions for grant opportunities, ongoing leadership development programs, and anti-racism training. 323 people have participated in 472 hours of workshops and trainings since July of 2020.</p>	<ul style="list-style-type: none"> <li>• 2,415 contact hours of capacity building were provided for 1,194 people.</li> <li>• Two events were held reconvening the previous Catalyst for Cultural Equity cohorts.</li> <li>• The Cultural Leadership Training program, currently in its 15<sup>th</sup> year, had 24 graduates.</li> <li>• ASC staff continue to identify opportunities through feedback from grant panels to support creative individuals and cultural organizations with workshops and training.</li> </ul>



Goal	FY 2021 Target	FY 2021 Mid-Year	FY 2020 Actual
Encourage cultural organization staff and board development in our communities through targeted grant funding.	ASC will offer Technical Assistance grants supporting capacity building opportunities that improve an organization's management, develop audiences, strengthen fundraising, and/or achieve operating efficiencies. ASC will also offer Professional Development Scholarship grants to encourage cultural organization staff and/or board members to attend workshops, conferences, or short-term training programs.	FY21 Technical Assistance Grants will prioritize the organizational work of anti-racism and enhancing Diversity, Equity, and Inclusion (DEI). The culture, history, policies, and practices—both formal and informal—of an organization affect the way we engage with the community, our audiences, stakeholders, and patrons. Technical Assistance Grants can provide resources to support organizations engaging in this critical work of cultural equity. 5 Technical Assistance and Professional development grants have been awarded in FY21 totaling \$21,603.50.	<ul style="list-style-type: none"> <li>• ASC awarded 17 Technical Assistance Grants in FY20, totaling \$73,817. 100% of these awards are dedicated to infrastructure building activities that will add technology and/or train board/staff on operating efficiencies and/or new skills that will drive additional earned and contributed revenue to the organization.</li> <li>• ASC awarded \$9,318 in Cato Teacher Professional Development Scholarships to 15 teachers in FY20, representing 13 schools. Professional Development Scholarship Grants allow staff and/or board members of nonprofit arts, science, or history organizations to attend workshops, conferences, or short-term training programs</li> </ul>

## 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$1,711,616	\$1,762,964	\$502,659
Merit	\$0	\$0	\$0
Benefits	\$447,991	\$470,391	\$134,118
<b>Subtotal Personnel Expenses</b>	<b>\$2,159,607</b>	<b>\$2,233,355</b>	<b>\$636,777</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$5,000	\$55,000	\$0
Communications (e.g. publishing, marketing)	\$221,500	\$225,000	\$64,152
Facilities (e.g. rent, utilities)	\$378,773	\$380,000	\$108,346
Office Supplies	\$10,375	\$11,000	\$3,136
Travel & Training	\$38,800	\$40,000	\$11,405
Technology	\$294,420	\$290,000	\$82,685
Other	\$10,160,475	\$10,849,765	\$3,093,499
<b>Subtotal Operating Expenses</b>	<b>\$11,109,343</b>	<b>\$11,850,765</b>	<b>\$3,363,223</b>
<b>Total Expenditures</b>	<b>\$13,268,950</b>	<b>\$14,084,120</b>	<b>\$4,000,000</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$9,473,866	\$10,283,043
Foundation Grants	\$1,639,312	\$1,650,000
Donor Contributions	\$2,547,902	\$2,500,000
Service Fees	\$0	\$0
Other Revenue	\$40,000	\$50,000
<b>Total Revenues</b>	<b>\$13,701,080</b>	<b>\$14,483,043</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds	Total Funds (No Public Art)
FY 2020 Prior Year	\$2,414,605	\$1,786,994
FY 2021 Current Budget	\$4,888,008	\$2,200,000
FY 2022 Projected (as requesting)	\$4,800,000	\$2,300,000



## FY 2022 Financial Partner Agency Board of Directors

### Agency Name: Arts and Science Council

**Susan Patterson**

John S. and James L. Knight Foundation

**Denis Bilodeau**

Town of Cornelius

**Tiffany W. Blackwell**

City of Charlotte

**Adrian Cox**

Mecklenburg County

**Katherine Delesalle**

Grant Thornton LLP

**Brett Denton**

Atrium Health

**Ed Driggs**

City of Charlotte

**George Dunlap**

Mecklenburg County

**Matt Gardner**

Hall Crawford Group, Merrill Lynch

**Renee Garner**

Town of Matthews

**Durral Gilbert**

President (Retired), Premier, Inc.

**Gaurav (Gau) A. Gupte**

ODELL

**Jeanne E. Johnson**

KPMG LLC

**Wesley Mancini**

Wesley Mancini, Ltd.

**Mattie B. Marshall**

Historic Washington Heights Community Association

**Valecia M. McDowell**

Moore & Van Allen

**Tim Miller**

Bank of America

**Nalan Karakaya Mulder**

Wells Fargo

**Geoff Owen**

Front Porch Financial Advisory

**Katrina Pride**

Bank of America

**Rich Schell**

Parker Poe Adams & Bernstein

**Deb Stewart**

Stewart + Company

**Jaz Tunnell**

Duke Energy Corporation

**Banu Valladares**

Charlotte Bilingual Preschool

**Mike Vasaune**

TIAA

**Denytra Whitner**

Community Volunteer

**Lisa M. Williams**

McGuire Woods LLP

## FY 2022 Financial Partner Agency Summary

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

***(New Funding Request)***

### **Scope of Service:**

BWF is proposing to conduct 2 programs under the **'Workforce and Business Development'** strategic priorities of the city.

These programs are

- 1. Social & Economic Empowerment Program**
- 2. Skill 2.0 program**

### **Program Details:**

#### **1. Social & Economic Empowerment Program**

##### **1.1. Goal - Develop a framework for Social & Economic empowerment**

The objective of this program is to establish the process of developing a **sense of autonomy and self-confidence within an identified set of people** and making them act individually and work with them collectively to change social relationships and the institutions and discourses that exclude “people in need” and keep them in poverty.

It has been noticed that people's empowerment, and their ability to hold others to account, is strongly influenced by their

- Individual assets (such as Assets, Investments, savings),
- Human capabilities (such as good health and education),
- Social (such as social belonging, a sense of identity, leadership relations), and
- Psychological (self-esteem, self-confidence, the ability to imagine and aspire to a better future). Also

It is important to highlight people's collective assets and capabilities, such as voice, organization, representation, and identity, and make them successful people. Such characteristics are core to an individual's success and this framework is build considering strengthening this key objective in mind.

Keeping all these into **considerations BWF will focus on preparing people to enhance some or all of the above-mentioned areas in a more focused or customized fashion and empower them by developing necessary skills so that the people in need are ready to get a job in the market.** This framework is transformational in nature by itself and will mature as it progresses through its journey by continuously learning and improving the process.

## **1.2. Target Audience**

- 1.2.1. The main focus of this program audience is to train the "people in need" who are looking for a job and make them market-ready
- The training will focus primarily on building soft skills & leadership skills
  - Case by case basis this program will organize work-related technology training

## **1.3. Operating model**

BWF will create a framework by utilizing various available sources (People & Technology) in the community to impart training, coaching, and mentoring to make any individual ready to obtain a job in the market.

This includes

- Utilizing professional, credible trainers/agencies to provide market-relevant training
- Utilizing HR professionals/Educationalists to coach an individual in soft skills & leadership skills
- Working closely with recruitment consultants to provide possible job opportunities for the trained resources

## **1.4. Measure the success (Key Performance Indicators)**

### **a. Enablement & providing a platform for all**

- This Program & Platform is open for all in the community.
- Frequencies of program rollouts, participations, and its success is a key measure
- The program will target participation through free memberships with a 95% of newly identified registration for each cycle

### **b. Direct Outcome**

- Eventually, the participants get the job

### **c. 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 'effectiveness of these events on a higher scale through training feedback

## **2. Skill 2.0 Program**

### **2.1. Goal - Develop the soft skills to be future-ready- Skill 2.0 program**

Following are the key objectives of this program

- A market Study report published by HCI research conducted in partnership with Randstad) shows the following data points
  - The hardest-to-find skills are overwhelmingly soft skills, such as leadership, communication, and listening. The higher up in the organization, the greater the percentage of soft skills that are required for

the role:

- 67 percent for entry-level and individual contributors;
  - 75 percent for mid-level positions and
  - 82 percent for senior leaders
- BWF believes that inculcation of such skills should start from the school going children level
  - Considering this theme as a background of this program, BWF has organized its first program in 2019 where the **theme was to build leadership capabilities among the young students of Charlotte**. The program was encapsulated under the flagship event names **“Leaders in the making” and the event topic was “Our Children is tomorrow’s civic leaders”**. This program was an overwhelming success and been participated by Charlotte city council members, mayor protem, and NC state senators. BWF is envisaging continuity of this event post COVID scenario and **nurture the soft skills of the younger generation and train them as “future-ready”**
  - Building the future blocks under the Skill 2.0 program based on the BWF’s experience, BWF is putting forward an objective of grooming the Soft Skill and leadership skills within the young students in the community

## 2.2. Target Audience

2.2.1. The main focus of this program is to coach leadership & soft skills **to the young students of the community and give them a platform to experience their learning and build confidence**. The tag line of this program is **“Skill 2.0 – Be Future-Ready”**

## 2.3. Operating model

This program is specifically to build soft skills and leadership skills for the targeted audience. This program will cover **participants from an elementary school to a young adult who wants to learn and sharpen their capabilities and become “future-ready”**. To make it happen BWF will use the already created framework by utilizing various community sources (People & Technology) to impart training to the identified sets of individuals.

This program includes

- Identify the student set based on the student registration process
- Utilizing Social skilled professional, credible trainers, HR personnel to provide relevant training on soft skills and leadership skills
- Give the trained individual an audience of renowned personalities to present their learned skills and eventually provide them live feedback, recognize their confidence and capabilities in a meaningful way

## 2.4. Measure the success (Key Performance Indicators)

### a. Enablement & providing a platform for all

- This Program & Platform is open for all students in the community.
- Frequencies of program rollouts, participations, and its success is a key measure
- The program will target participation through a free registration

### b. Direct Outcome

- Eventually, the participants get 4 to 5 (vary course to course basis) weeks of training
- Get a forum to present their learning through the **“Leaders in making”** banner to the renowned personalities in the society
- Get certification for performance

**c. Indirect Outcome**

- Individual performance improvements in one or all of the identified parameters
- Participants to appraise ‘effectiveness of these events on a higher scale through training feedback

**3. The common Framework to be set up and the Activities to be performed for running these programs are:**

- Setup infrastructures related to humans & technologies. such as
  - creating a sustainable trainer base & ecosystem,
  - a building like-minded volunteer base,
  - identify professional agencies who are aligned with this type of work,
  - building a reusable technology platform to support such program repeatedly
- Program execution, event programming, venue management, etc.
- Reaching out to the society and identify the "people in need" and “Student base” and filter them eventually to meet these program need
- From a program success perspective creating an ecosystem with Job recruiters & professionals
- Connecting with social and city officials to encourage them to participate in these events to provide real-life feedbacks to the audience
- Running a barebone operating infrastructure by recruiting part-time personnel for maintaining day to day operational needs
- Set up telephony support to receive calls from resources and manage interactions. For this a dedicated investment of cell phone, monthly rentals and part-time cost for an office staff who will be responsible to manage these activities needs to be planned

**Mission Statement:**

**“BWF strives to be the change catalyst and brings the change the 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

**Vision Statement:**

*Be the "first to go" Women-led organization at Charlotte trusted for bringing change in the society*

BWF's goal is to identify key issues (for example, health, social welfare, education, barriers to equal opportunity etc.) affecting Women and Men and find the avenues to remediate the same by bringing change in the society.

**FY 2021:** \$0

**FY 2022 Request:** \$10,000

**Supports:** A funding budget proposal would support the Social and Economic Empowerment program and the Skill 2.0 Program.

BWF is requesting the city to fund both of BWF's flag-ship programs as described above. So far the President of BWF Mrs. Shanta Dutta was running these programs with a limited scope by investing her money which is not sustainable in the long run. therefore BWF is reaching out to City for providing the necessary funds to make these programs impactful and sustainable for society. BWF feels that these programs can be a differentiator for the City of Charlotte and by virtue of BWF's networking capabilities and existing connections within Charlotte, BWF believes that it can bring significant change in the social landscape.

**Agency Established:** January 09, 2020

**Total Years Financial Partner with City of Charlotte:** 0 Years

**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 Tomorrow's 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



## 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 2022 Financial Partner applications.

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

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$0	\$0
Foundation Grants	\$125	\$0
Donor Contributions	\$0	\$1000
Service Fees	\$0	\$0
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$125</b>	<b>\$1000</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$0
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0

## **FY 2022 Financial Partner Agency Board of Directors**

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

**Shanta Dutta**

President & Chair of the Board

**Animita Chowdhury Saha**

Board of Directors

**Mehreen Muner**

Board of Directors

**Karli Bose**

Board of Directors

**Saswati Collam**

Board of Directors



## 2022 Financial Partner Agency Summary

**Agency Name: Charlotte Regional Business Alliance**

**Scope of Service:**

The Charlotte Regional Business Alliance (CRBA) is a public-private partnership serving as the Charlotte Region's voice of business for equitable economic growth. We grow the economy, position the region to compete for business investment, and connect through shared purpose initiatives that no single individual nor organization can tackle alone.

**Mission Statement:**

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

**FY 2021:** \$164,085

**Support:** Funding supports business and economic development and regional marketing.

**FY 2022 Request:** \$166,553

**Increase:** \$2,468

**Supports:** Increase is based on \$0.30 per capita and will support the agency's regional marketing efforts and business recruitment program that pursues domestic and international companies to locate their business in Charlotte.

**Agency Established:** Legacy Charlotte Chamber of Commerce (1870); Legacy Charlotte Regional Partnership (1990); Newly Formed Charlotte Regional Business Alliance (2019).

**Total Years Financial Partner with City of Charlotte:** 11 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.

## Objectives Report

### Corporate Scorecard Objective:

Goal	FY 2022 Target	FY 2021 Mid-Year	FY 2020 Actual
To generate new projects of companies that are interested in expanding or Relocating to the Charlotte Region	<u>&gt;80</u>	14	63
To participate in site visits to our region from companies and consultants	<u>&gt;25</u>	1	29
To support projects that are interested in the region, but that we are not leading	<u>&gt;40</u>	9	30
To meet with domestic and international leads and projects to market the Charlotte Region to them	<u>&gt;126</u>	NA	NA

### Comments/ Explanation:

CRBA officially became an organization in January of 2019, and the organization runs on a calendar year. To be consistent with the schedule above for Mid-Year 2020, CRBA will count the progress towards each goal from July – December 2019.

## 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$3,908,724	\$4,104,160	\$0
Merit	\$0	\$123,125	\$0
Benefits	\$999,680	\$1,059,661	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$4,908,404</b>	<b>\$5,286,846</b>	<b>\$0</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$808,740	\$833,002	\$166,553
Facilities (e.g. rent, utilities)	\$1,040,550	\$1,071,767	\$0
Office Supplies	\$52,418	\$52,942	\$0
Travel & Training	\$271,368	\$275,439	\$0
Technology	\$320,601	\$352,661	\$0
Other	\$1,404,200	\$1,333,990	\$0
<b>Subtotal Operating Expenses</b>	<b>\$3,897,877</b>	<b>\$3,919,801</b>	<b>\$166,553</b>
<b>Total Expenditures</b>	<b>\$8,806,281</b>	<b>\$9,206,747</b>	<b>\$166,553</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$498,450	\$514,179
Foundation Grants	\$497,500	\$621,875
Donor Contributions	\$7,394,359	\$8,000,000
Service Fees	\$0	\$0
Other Revenue	\$90,722	\$150,000
<b>Total Revenues</b>	<b>\$8,481,031</b>	<b>\$9,286,054</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$161,526
FY 2021 Current Budget	\$164,085
FY 2022 Projected (as requesting)	\$166,553



## FY 2022 Financial Partner Agency Board of Directors

Agency Name: Charlotte Regional Business Alliance

**Carol Lovin**

Atrium Health

**Jennifer Weber**

ADM

**Malcomb Coley**

EY

**Kieth Cockrell**

Bank of America

**Luis Lluberas**

Moore & Van Allen PLLC

**Joe Paradise**

KPMG

**Janet LaBar**

CLT Alliance

**Michelina Antahades**

Charlotte Regional Visitors Authority

**Clay Armbrister**

Johnson C. Smith University

**Geoff Gray**

Signature Consultants, LLC

**Heath Campbell**

Truist

**Derick Close**

Springsteen Capital

**Melisa Cronin**

Accenture

**Jesse Cureton**

Novant Health

**Dena Diorio**

Mecklenburg County

**Danielle Frazier**

Charlotte Works

**Tom Glick**

Tepper Sports & Entertainment

**David Head**

Grant Thornton

**Reginald Henderson**

Lowe's

**Donny Hicks**

Gaston County EDC

**Julie Janson**

Duke Energy Corporation

**Marcus Jones**

City of Charlotte

**Pat Jones**

Carowinds

**David Longo**

CBI / Workplace Solutions

**Scott Millar**

Catawba County EDC

**Tracy Montross**

American Airlines

**Christopher Moxley**

704 Shop

**Alan Sauber**

Premier

**Hunter Shull**

Wells Fargo

**Jennifer Troyer**

UNC Charlotte

**Laura Ulrich**

Federal Reserve Bank of Richmond

**Fred Whitfield**

Charlotte Hornets Sports & Entertainment

**Banks Wilson**

Union

**Teross Young**

Food Lion LLC



## FY 2022 Financial Partner Agency Summary

### Agency Name: Community Building Initiative

#### Scope of Service:

Community Building Initiative (CBI) advances access, inclusion and equity in Charlotte- Mecklenburg. Founded as a task force in 1997 to help Charlotte respond to a community crisis, CBI has evolved from a crisis-inspired response into a permanent, trusted community resource in the long-term work of achieving inclusion and equity. CBI believes that a person's identity and zip code should not predict life outcomes. If race, gender, economic status or neighborhood can predict one's educational success, economic stability or fair treatment in the justice system, we are not building a community in which equity is a value and a priority. In alignment with its equity and inclusion values, CBI intentionally involves diverse, cross-sector groups of people and organizations in its intensive and interactive programs and partnerships. CBI's Equity Framework is embedded in all of its programs with the intention to increase the capacity and commitment of participants and partners to acknowledge and analyze the power system of white supremacy and strategize structural interruptions and innovations to address barriers, close gaps and improve outcomes and opportunities for all.

#### Mission Statement:

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.

**FY 2021:** \$50,000

**Supports:** Funding supported continued engagement and education for organizations and community partners to advance and increase access, inclusion and equity to the community.

**FY 2022 Request:** \$50,000

**Increase:** \$0

**Supports:** Operations of the agency's signature programs: Leadership Development Initiative, Leaders Under 40, Community Bus Tours, Equity Impact Circles, annual Stakeholders Breakfast, community dialogues and conversation guides.

**Agency Established:** 1997

**Total Years Financial Partner with City of Charlotte:** 14 Years

#### Population Served:

Each year CBI directly engages a diverse, cross-sector group of approximately 2400 people connected to more than 40 key community organizations and groups. CBI does not provide direct services but rather equips people and organizations with the knowledge, skills and courage to advance the work of inclusion and equity. Organizations that CBI supports through its programs include the City of Charlotte and Mecklenburg County, along with Charlotte Mecklenburg Library, CMS, CMPD, Atrium Health, Novant Health, Charlotte Center for Legal Advocacy, the Housing Partnership, Latin American Coalition, Camino Community Center, DA's Office, MEDIC, Time Out Youth and the Arts & Science Council, all of which serve and provide services in and/or to people in under-represented communities.

## Objectives Report

### Corporate Scorecard Objectives: Safe Communities, Great Neighborhoods & Well-Managed Government

Goal	FY 2022 Target	FY 2021 Mid-Year	FY 2020 Actual
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.	85%	CBI issued the final LDI 19 program evaluation when the program concluded in October, but given the ongoing challenges of the pandemic, evaluation is about 60% complete. Efforts are underway to secure the remaining evaluations, and results will be reported as soon as a majority of participants have been able to respond.	95%
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.	45-50 participants	47 participants	49 participants
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.	75 engagement events	55 engagement events	23 engagement events



## 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$327,356	\$327,356	\$0
Merit	\$0	\$0	\$0
Benefits	\$71,444	\$71,444	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$398,800</b>	<b>\$398,800</b>	<b>\$0</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$2,500	\$2,500	\$0
Communications (e.g. publishing, marketing)	\$40,000	\$40,000	\$6,900
Facilities (e.g. rent, utilities)	\$41,000	\$41,000	\$6,150
Office Supplies	\$17,700	\$17,700	\$3,100
Travel & Training	\$0	\$0	\$0
Technology	\$6,000	\$6,000	\$1,000
Other	\$229,000	\$229,000	\$32,850
<b>Subtotal Operating Expenses</b>	<b>\$366,200</b>	<b>\$366,200</b>	<b>\$50,000</b>
<b>Total Expenditures</b>	<b>\$735,000</b>	<b>\$735,000</b>	<b>\$50,000</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$0	\$0
Foundation Grants	\$35,000	\$35,000
Donor Contributions	\$460,000	\$460,000
Service Fees	\$115,000	\$115,000
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$610,000</b>	<b>\$610,000</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$27,500
FY 2021 Current Budget	\$50,000
FY 2022 Projected (as requesting)	\$50,000



## FY 2022 Financial Partner Agency Board of Directors

### Agency Name: Community Building Initiative

**Cathy Best**

Atrium Health

**Carola Cardenas**

Johnston YMCA

**Ray Feaster**

Novant Health

**Jenni Gaisbauer**

Charlotte Mecklenburg Library Foundation

**Sally Geaney**

National Contact Center, TIAA (retired)

**Caroline Griffin**

Price Waterhouse Cooper

**Megan Liddle Gude**

Charlotte Center City Partners

**Bryon Hawkins**

Bank of America

**Brian Heslin**

Duke Energy

**Rick McDermott**

McDermott, PLLC

**Justin Perry**

Justin Perry Counseling, LLC

**Kendel B. Phillips**

Wells Fargo Bank

**Elly Portillo**

UNC-Charlotte Urban Institute

**Derrick Ramos**

Mecklenburg County

**Willie Ratchford**

City of Charlotte

**Ann Sanders**

Council for Children's Rights

**Osei Sencherery**

Deloitte & Touche, LLP

**Gerald Smith**

Charlotte Mecklenburg Police Department

**Jenny Ward**

Bank of America

**Tom Zweng**

Physician



## FY 2022 Financial Partner Agency Summary

**Agency Name: Historic West End Partners**

***(New Funding Request)***

**Scope of Service:** In simple terms, HWEP advocates for the holistic, inclusive progression of Charlotte's historic African American business district to foster a thriving, vibrant live, work, play eco-system without hemorrhaging identity and people. HWEP's scope of work includes yet is not limited to:

- Small Business Support & Recruitment
- Place-Progression (placemaking on steroids)
- Heritage Tourism
- Cultural/Historic Preservation & Infusion
- Outreach & Engagement (Community, Public & Private)
- Education
- Beautification
- Branding
- Safety
- Critical Partnerships/Collaboration Management

HWEP is seeking 3 years of funding from the Knight Foundation and Z. Smith Reynolds.

**Mission Statement:** The Historic West End Partners advocates for cultural preservation and economic development stimulation in the Historic West End.

**FY 2021:** \$0

**FY 2022 Request:** \$108,842

**Supports:**

The funds requested will ensure that a dedicated director and an administrative support person will remain in place to orchestrate the scope of work efficiently and expeditiously. We realize that funders are more apt to allocate programmatic and special project dollars when consistent, quality executors are in place and critical partnerships exist.

**Agency Established:** March 02, 2010

**Total Years Financial Partner with City of Charlotte:** 0 Years

**Population Served:** HWEP serves the diverse Historic West End Community of stakeholders, and organizations in the Greater West and East Crescent. Our efforts impact:

- Small Businesses & Business Districts
- Neighborhoods
- Academic Institutions
- Faith-based organizations
- Visitors
- Municipalities

## 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$90,250	\$90,250	\$90,250
Merit	\$0	\$0	\$0
Benefits	\$8,592	\$8,592	\$8,592
<b>Subtotal Personnel Expenses</b>	<b>\$98,842</b>	<b>\$98,842</b>	<b>\$98,842</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$2,000	\$2,000	\$0
Communications (e.g. publishing, marketing)	\$10,500	\$21,000	\$0
Facilities (e.g. rent, utilities)	\$8,000	\$8,000	\$0
Office Supplies	\$2,000	\$2,000	\$0
Travel & Training	\$5,000	\$5,000	\$0
Technology	\$5,000	\$5,000	\$0
Other Administrative Assistant	\$30,000	\$40,000	\$10,000
<b>Subtotal Operating Expenses</b>	<b>\$62,500</b>	<b>\$83,000</b>	<b>\$10,000</b>
<b>Total Expenditures</b>	<b>\$161,342</b>	<b>\$181,842</b>	<b>\$108,842</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$0	\$0
Foundation Grants	\$70,000	\$55,000
Donor Contributions	\$5,000	\$8,000
Service Fees	\$2,500	\$5,000
Other Revenue	\$20,000	\$30,000
<b>Total Revenues</b>	<b>\$97,500</b>	<b>\$98,000</b>

### Total Funds received from Mecklenburg County, if applicable.

Fiscal Year	Total Funds
FY 2020 Prior Year	\$0
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0



## FY 2022 Financial Partner Agency Board of Directors

### Agency Name: Historic West End Partners

**Judge Linwood O. Foust (retired)-President**

Historic West End Resident

**Nancy Stroud- Treasurer**

Historic West End Resident

**Mike Griffin- Director**

Mosaic Village Holdings

**Rev. Mildred McCullough- Director**

Historic West End Resident

**Jermaine Blackmon- Director**

Original Chicken & Ribs

**Eric Orozco- Director**

Neighboring Concepts

**Shannon H. Hughes- Vice Presiden**

Top Line Chemical Solutions

**Mary Johnson- Secretary**

Historic West End Resident

**Bernetta Powell- Director**

West End Fresh Seafood

**Attorney Robert Kelly Corbett**

The Corbett Law Firm, PLLC

**Carlenia Ivory- Director**

Historic West End Resident

**Gene Flavors- Director**

Historic West End Resident



## FY 2022 Financial Partner Agency Summary Agency Name:

**MeckEd**

***(New Funding Request)***

### **Scope of Service:**

MeckEd advocates on behalf of students attending Mecklenburg County public schools and operates direct service programs to deliver on our mission.

#### **Charlotte NEXT:**

The program vision is that there will be equitable access to a range of interesting and meaningful extended learning experiences at all Charlotte Mecklenburg Middle Schools (CMS).

As the city's extended learning intermediary, Charlotte NEXT is replacing a fragmented system of service providers that currently perpetuate inequitable offerings, with a cohesive, coordinated, and aligned approach. Our model places a priority on building and leveraging partnerships that include public agencies, service providers, businesses, funders, and schools - all designed on what is in the best interest of the students. Charlotte NEXT built and maintains "The Locator," an online tool that allows families to search for extended learning opportunities that fit their needs. Additionally, we find funding to place programs in schools identified as having inequitable extended learning offerings and work with the providers to establish and measure quality standards for programming.

#### **Career Pathways:**

This program connects high school students to impactful work-based learning opportunities, fostering career exploration, while also connecting the dots to real-world application of education and the workplace.

Career Pathways provides experiences typically associated with well-resourced young people (job shadows, college visits, guest speakers, internships, community building activities) to low- resourced youth attending four Title I high schools (Garinger, Harding, Vance, and West Charlotte). Career Pathways Advisors are placed full-time in the schools to serve as social navigators. Obstacles that could prevent participants from achieving success are identified by the advisors in partnership with the students and the appropriate resources (human and financial) are secured to overcome those obstacles. Since 2012, over 12,000 students (approx. 2,000 annually) are served through this program.

### **Mission Statement:**

MeckEd's mission is to ensure that all students in Mecklenburg County have access to the knowledge, skills, and experiences necessary to lead productive and successful lives.

**FY 2021:** \$0

**FY 2022 Request:** \$120,000

**Supports:** With support from the City of Charlotte, Charlotte NEXT will increase access to, and the

quality of, extended learning opportunities for CMS's most challenged middle school students.

We know low-income youth experience thousands fewer hours of enrichment and academic learning than their more affluent peers by 8th grade. Additionally, COVID-19 is expected to have greater effects on learning for low-income students and specifically Black and Hispanic students. We need to have proper extended learning opportunities available for students knowing many will return to school next fall having experienced social disconnection, significant learning gaps, and trauma.

With the most recent announcement from CMS that 60 or 95 After School Enrichment Programs (ASEP) will be cancelled effective April 1, no middle schools will have access to district provided extended learning. We know through our recent mapping that low-performing schools were already lacking in equitable extended learning offerings due to the fragmented system that exists. Now, more than ever, the community needs an intermediary designed to focus on the issue and unite the key stakeholders to bring equitable offerings to all middle schools across the county, especially our low-performing schools.

If awarded, this grant would be used to do the following:

1. MeckEd will utilize our 25+ years of experience in advocacy to call for an increase of resources from federal, state, and local funders to bring extended learning opportunities to low-performing schools.
  - We will utilize our communications platforms to educate the community on how great the need is and how extended learning is proven to keep kids and the community safe and increase the academic performance of students.
  - We will provide outreach to educate families in our highest-need communities about available programming and how they can enroll their children.
2. Increase access to programming.
  - Most of the funding will be used to contract direct service providers and place them in schools with the highest needs. Providers will demonstrate that they have high-quality programming. We will promote continuous improvement by collecting data about program effectiveness and setting shared expectations for quality.
  - We currently have three providers lined up to provide services for FY22. More will be contracted if funding is available. Programs include:
    1. Digi-Bridge
    2. The Dottie Rose Foundation
    3. Firm Foundations
3. Align and coordinate efforts of various stakeholders.
  - In our mapping, some schools were found to have 15+ available extended learning opportunities while others had none. There has not been a system to ensure that equitable offerings are available in each school, especially those with the highest needs. We will work with the district, city and county officials, businesses, funders, families, and providers to coordinate efforts and work towards equitable offerings at our low-performing schools.

**Agency Established:** November 01, 1991

**Total Years Financial Partner with City of Charlotte: 0 Years**

**Population Served:** The population served for this grant request for Charlotte NEXT will be the thousands of students attending the county's Title I middle schools (grades 6-8; ages 11-14).

Specifically, the program will advocate for students attending schools identified as having little to no extended learning programs available (currently 12,000+ students).

Direct service providers will be contracted to provide extended learning opportunities to approximately 100-120 at risk students (20-40 students per provider) from August 2021 – December 2021.

Students will attend from the following schools.

- James Martin Middle
- Albemarle Middle
- Wilson STEM Academy
- Druid Hills

\*Depending on available funding, more schools and students may be added.

For the purposes of this grant, at-risk students are considered to be:

- Students not performing at grade level as demonstrated by statewide assessments;
- Students at-risk of dropout and;
- Students failing one or more of their core classes.



## 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$476,000	\$504,560	\$20,000
Merit	\$0	\$0	\$0
Benefits	\$51,845	\$55,000	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$527,845</b>	<b>\$559,560</b>	<b>\$20,000</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$11,380	\$11,968	\$0
Facilities (e.g. rent, utilities)	\$50,868	\$53,920	\$0
Office Supplies	\$5,000	\$5,000	\$0
Travel & Training	\$15,000	\$15,000	\$0
Technology	\$7,250	\$8,000	\$0
Other	\$280,416	\$241,725	\$100,000
<b>Subtotal Operating Expenses</b>	<b>\$369,914</b>	<b>\$335,613</b>	<b>\$100,000</b>
<b>Total Expenditures</b>	<b>\$897,759</b>	<b>\$895,173</b>	<b>\$120,000</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$466,308	\$492,000
Foundation Grants	\$396,451	\$436,096
Donor Contributions	\$35,000	\$3,500
Service Fees	\$0	\$0
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$897,759</b>	<b>\$970,096</b>

### Total Funds received from Mecklenburg County, if applicable.

Fiscal Year	Total Funds
FY 2020 Prior Year	\$0
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$120,000

## FY 2022 Financial Partner Agency Board of Directors

Agency Name: MeckEd

**Jennifer Roberts**

echoAmerica

**Keith Butler**

Duke Energy

**Janeen Butler**

CREED

**Sheryl Craun**

Nuveen

**Josh Dobeck**

Turner Construction

**Kathleen Dryden**

Bank of America

**Bill Leonard**

Atrium Health

**John McKeever**

Direct Chassis Link, Inc.

**Tchernavia Montgomery**

Crisis Assistance Ministry

**Jane Lewis Raymond**

Hilltop Strategies

**Pawanjit Singh**

Premier Inc.

**Susan Gann**

Charlotte Mecklenburg Schools  
\*Joining March 2021

## FY 2022 Financial Partner Agency Summary

Agency Name: Mental Health America of Central Carolinas

*(New Funding Request)*

### **Scope of Service:**

Mental Health America of Central Carolinas (MHA) is a unique multi-faceted organization focused on the community's ever-changing mental health needs. Helping the most vulnerable residents of Mecklenburg and Cabarrus counties achieve mental wellness is fundamental to MHA's mission. The organization's primary goal is to ensure community members have access to quality mental healthcare so they can achieve optimal mental health. This is accomplished by advocating for systemic changes addressing gaps in service; preventing mental health crises through evidence-based trainings; educating key publics about mental health resources; and teaching self-advocacy skills.

Each year MHA measurably impacts thousands of individuals through its programs and services, providing the resources and tools needed for community members to achieve optimal mental health. In terms of human gains for these individuals, MHA's outcome data speak loudly: overall, MHA's program participants see tremendous results, with up to 90% gaining needed skills/knowledge and modifying attitudes/perceptions. The vast majority of people touched by MHA are better equipped to help themselves and others, thereby alleviating suffering while striving to achieve mental wellness. MHA is uniquely positioned to have a strong and positive impact on Charlotte-Mecklenburg's ever-growing mental health crisis with a staff of professionals who have lived experience with mental health concerns. This enables MHA staff to connect quickly with clients/participants and with high levels of comfort and trust.

MHA's 2019-2023 Strategic Plan clearly articulates a goal to align its programs and services where community needs exist, thereby achieving its mission through collaboration with key neighborhood and community-based partners. MHA's key programs and services are evidence-based, fitting under three categories: (1) Family Peer Support, (2) Social Support for Adults with Mental Illness, and (3) Community Education and Outreach as outlined below.

### Family Peer Support

ParentVOICE provides tools, resources and support to family members of youth experiencing emotional, behavioral and mental health challenges. Certified Family Partners teach families how to navigate the education, mental health, child welfare, and judicial systems to achieve positive outcomes. ParentVOICE is staffed by individuals with lived experience, a parent or caregiver who is/has raised a child with mental, behavioral or substance use needs and who has received services on behalf of their child. MHA has offered ParentVOICE to the Charlotte-Mecklenburg community since 2010.

Triple P (Positive Parenting Program) is an important component of ParentVOICE, providing individual consultations with parents/caregivers to reduce child behavior problems and teach healthy parenting. Triple P is typically delivered one-on-one where the parent/caregiver and Family Partner work together to identify the child's behaviors to target and create a parenting plan to address those behaviors. Once a plan is in place, the parent/caregiver and practitioner can work together to track changes and improvements and adjust the plan as needed.



Family Partner Training Institute (FPTI) is a training program for community members interested in becoming Family Partners. Through FPTI, parents/caregivers learn state and national best practice core competencies, providing approximately 120 instructional hours. The majority of participants taking the training achieve state certification and many go on to attain national certification. In addition to becoming skilled family advocates, participants gain skills and tools that can lead to employment opportunities and improved economic mobility.

#### Social Support for Adults with Mental Illness

MHA's Compeer program matches community volunteers with adults in mental health recovery. Volunteers provide one-to-one supportive friendship to offset loneliness and social isolation that can accompany mental illness. MHA has offered Compeer to the Charlotte-Mecklenburg community since 1990. Compeer International is an evidence-based program model that promotes good mental health through meaningful friendships. Initial outcomes include increased confidence and self-empowerment, increased optimism for the future and improved social skills. Intermediate outcomes include increased community integration and increased stability (reduced hospitalization and use of crisis services.) Ultimate goals include supported recovery and improved quality of life.

#### Community Education and Outreach

QPR (Question, Persuade and Refer) Suicide Prevention Training is a two-hour training for teens and adults, offering three steps to help save a life from suicide. Participants trained in QPR learn how to recognize the warning signs of a suicide crisis and how to question, persuade, and refer someone to help. Each participant can become a Gatekeeper who is, according to the Surgeon General's National Strategy for Suicide Prevention (2001), a person in a position to recognize a crisis and the warning signs that someone may be contemplating suicide. MHA has offered QPR to the Charlotte-Mecklenburg community since 2008.

Mental Health First Aid (MHFA) has both youth and adult versions, as well as modules focused on public safety, veterans and seniors. It is designed to increase participants' ability to respond appropriately to someone experiencing a mental health crisis. Participants gain an understanding of the potential risk factors and warning signs for a range of mental health problems; the prevalence of various mental health disorders in the U.S. and the need for reduced stigma in their communities; and a five-step action plan encompassing the skills, resources, and knowledge to assess the situation, to select and implement appropriate interventions, and to help the individual in crisis connect with appropriate professional care. MHA has offered MHFA to the Charlotte-Mecklenburg community since 2012. This included training local police, sheriffs and fire fighters with the public safety version of MHFA.

Coffee and Conversation was established in 2013 as part of MHA's Mental Health Matters: It's Time to Talk Campaign. This program, incorporating volunteers sharing their experiences of mental health recovery, is designed to invite community conversation about mental health and to reduce associated stigma.

MHA's Workplace Wellness Program is new since the onset of COVID-19 in 2020, stemming from employer interest in helping employees cope and manage stress. Program content is based on best-practice resources of the American Psychological Association and the Mental Health America national office.

Information and Referral Services include navigation of resources and offering support for community members and health professionals, including free confidential screening tools and a provider directory, for those seeking mental health services.

Legislative Advocacy provides the opportunity for MHA to educate legislators and policymakers



about the needs of individuals who depend upon the public mental health system and public policies that address those needs. Individuals learn to become self-advocates and engage in grassroots advocacy.

Free Counseling: MHA currently has funding available to provide free short-term counseling to adults and youth impacted by COVID. Mental health concerns stemming from COVID will continue long after the pandemic is gone and MHA hopes to continue this program.

### **Mission Statement:**

MHA is dedicated to providing help, offering hope and promoting mental wellness through advocacy, education, and prevention.

**FY 2021:** \$0

**FY 2022 Request:** \$50,000

### **Supports:**

MHA will use the \$50,000 from the City of Charlotte to support a portion of staff salaries. This funding will help fund staff capacity around the organization's *Emotional Toolbox for Building Resilient Communities*.

Through a grassroots approach, MHA reaches individuals and families by partnering with key community stakeholders of high-risk communities, including Crossroads CDC/Grier Heights, UCITY Family Zone, Mecklenburg County's Village HeartBEAT, and the Valerie C. Woodard Center on Freedom Drive. Stakeholders serve as the gateway to these populations, helping MHA tailor programs and services to meet their community members' needs. For the City of Charlotte Financial Partner Grant, MHA will place emphasis on reaching marginalized communities, including the Latinx communities within the City as described in the Population Served section. MHA recently hired a bilingual (Spanish/English) Mental Health Educator who will play a lead role in providing mental health education within the Latinx community.

Because there is no "one size fits all" solution to building resilient communities and promoting optimal mental health, MHA's approach is "boots on the ground," aligning programs and services where community needs exist. Programming will be offered in three key areas: (1) Family Peer Support: ParentVOICE, Triple P (Positive Parenting Program), and Family Partner Training Institute; (2) Social Support for Adults with Mental Illness: Compeer; and (3) Community Education and Outreach: QPR (Question, Persuade, and Refer) Suicide Prevention Training, Mental Health First Aid, Workplace Wellness Program, and Coffee and Conversation. These programs were described in the previous section for Agency Description.

Although each of MHA's programs and services noted above will be offered as part of this grant project, it is noteworthy to state that, in particular, demand for ParentVOICE in the Charlotte-Mecklenburg area has increased. MHA anticipates that this increase will continue through the coming year due to the impact of COVID-19 on youth and families. ParentVOICE incorporates the principles of System of Care whereby families and youth work in partnership with public and private organizations, ensuring supports are effective and built on the families' strengths and needs. According to the NC System of Care Handbook for Children, Youth and Families, this approach serves the whole family, respects family strengths, builds on the family's knowledge about their children, and does not restrict children/youth or families to a "one size fits all" mindset. The System of Care takes a whole-family approach to achieve desired outcomes identified by the youth and family.



Collaboration is key to success for ParentVOICE as it is for all of MHA's programs; MHA believes the only way to move the needle on mental health is through community-based partnerships. ParentVOICE depends on expertise from the community to provide parents/caregivers and youth with the knowledge needed to support their children as well as themselves. ParentVOICE connects with resources in the community, including: Charlotte-Mecklenburg Schools, the library system; North Carolina Families United for trainings and workshops; the court system; the faith community; and neighborhood associations.

Engaging youth in their treatment and recovery is also critical to success. Support groups have been established for the age groups of 8-13 and 14-20 years and are supported by MHA's Youth Engagement Specialist. It is anticipated that some bi-lingual parents will participate in the 2021 Family Partner Training Institute to help with the growing need for support of Spanish-speaking parents in Youth Recovery Court.

During the COVID-19 pandemic, all of MHA's programs and services have been adapted to meet the health and safety needs of its staff, partners, and program clients/participants. Through virtual program delivery for participant groups and phone calls/Zoom for one-on-one client interactions and group support, MHA continues to provide quality programs and services with the same level of compassion and care.

**Agency Established:** January 01, 1933

**Total Years Financial Partner with City of Charlotte:** 0 Years

**Population Served:**

According to the Substance Abuse and Mental Health Services Administration (SAMHSA), one in five people have a mental health diagnosis with an estimated 50% of lifetime cases of mental illness beginning by age 14. For Mecklenburg County, mental health is a serious and growing public health problem as evidenced by key community health data. The Mecklenburg County Community Health Assessment (2019) ranked mental health as the NUMBER ONE health issue in 2017 (up from number two in 2013); access to care was ranked number two in 2017 (up from number three in 2013). Key facts from this report include: one in six adults, or over 157,000 people, report a diagnosis of depression; nearly one in three high school students stopped doing regular activities due to prolonged sadness; 14% of high school students report making a suicide plan; and, per death, an average of 37 years of potential life was lost due to suicide.

Before the COVID-19 pandemic ever hit the Charlotte-Mecklenburg community, mental health professionals and community leaders recognized that a mental health crisis was in play, especially for persons enrolled in the Medicaid system, children and youth, and families caught in the cycle of intergenerational poverty. This concern has been outlined in key community reports over the last three to five years, including the following: Mecklenburg County State of the County Health Report; Charlotte Mecklenburg Youth Risk Behavior Survey (YRBS); Navigating the Maze: An Assessment of Mental Health Resources For Children and Adolescents In Charlotte-Mecklenburg; and Leading on Opportunity Charlotte-Mecklenburg Opportunity Task Force Report. With the ongoing negative impact of COVID-19 on mental health and substance use, now more than ever, MHA's programs and services are needed in the community to ensure the best possible outcomes for individuals struggling with mental health issues. Providing services to these vulnerable populations is critical to the overall mental health of the greater Charlotte-Mecklenburg community. As such, it is imperative that MHA focuses on the immediate and anticipated long-term mental health needs of the community due to COVID-19. MHA must provide robust outreach through its *Emotional Toolbox for*



### *Building Resilient Communities.*

MHA serves both Mecklenburg and Cabarrus counties; however, for the City of Charlotte Financial Partner Grant, outreach and education efforts will be focused on city 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 regardless of socio-economic or demographic status. Nonetheless, MHA places a strong emphasis on reaching the most vulnerable and marginalized community members who face multiple barriers to mental healthcare, including stigma, cost, lack of health insurance, and race.

Charlotte is not only the largest city in North Carolina, it is also among the fastest growing cities in America. According to the U.S. Census Bureau's American Community Survey, Charlotte added more than 154,000 residents between 2010 and 2019. Growing by 20.4% since 2010, the City's population is an estimated 885,708. The North Carolina Office of Budget and Management reports that fully two-thirds (67.2%) of the region's population growth comes from those who move here from outside the county. Clearly, Charlotte's growth also fuels its diversity. The City's socioeconomic diversity is reflected in the data below, each of which either directly or indirectly play a role in the mental health profile of the City of Charlotte.

- Race/Ethnicity: 48.8% White, 35.2% Black, 14.3% Hispanic or Latino
- Sex: 41.8% Male, 51.9% Female
- Persons living in Poverty: 12.8%
- Persons under 18 years old (approximately 50% of lifetime cases of mental illness begin by age 14): 23.7%
- Persons under age 65 without health insurance: 13.8%

Within the City of Charlotte, the socioeconomic geography of its neighborhoods is often characterized by a "crescent and wedge" pattern with predominantly white, more affluent households residing in a wedge-like sector stretching south-southeast from the City's central business district, surrounded by a crescent of lower socioeconomic neighborhoods. The crescent is generally characterized by lower household incomes, higher rates of unemployment, lower levels of labor force attachment, and poorer educational outcomes. The crescent, however, is not a homogenous area. According to UNC Charlotte's Quality of Life Explorer, African American neighborhoods are more heavily concentrated in northern and western portions of the crescent while Hispanic households, with a few important exceptions, are disproportionately found in the crescent's east side. Growth of Charlotte's Latinx population has been a hallmark of the City's changing population. The City's growth and increasing diversity, along with the disproportionate burden of COVID-19 on Black and Hispanics, affect demand for MHA to target its programs and services to these underserved groups.

## 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$633,800	\$652,814	\$41,799
Merit	\$0	\$0	\$0
Benefits	\$168,913	\$173,319	\$8,201
<b>Subtotal Personnel Expenses</b>	<b>\$802,713</b>	<b>\$826,133</b>	<b>\$50,000</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$15,650	\$15,963	\$0
Facilities (e.g. rent, utilities)	\$44,700	\$44,700	\$0
Office Supplies	\$12,100	\$13,000	\$0
Travel & Training	\$31,620	\$35,000	\$0
Technology	\$44,000	\$46,000	\$0
Other	\$210,050	\$215,000	\$0
<b>Subtotal Operating Expenses</b>	<b>\$358,120</b>	<b>\$369,663</b>	<b>\$0</b>
<b>Total Expenditures</b>	<b>\$1,160,833</b>	<b>\$1,195,806</b>	<b>\$50,000</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$504,113	\$480,113
Foundation Grants	\$429,243	\$429,000
Donor Contributions	\$140,000	\$150,000
Service Fees	\$13,000	\$20,000
Other Revenue	\$34,000	\$41,887
<b>Total Revenues</b>	<b>\$1,120,356</b>	<b>\$1,121,000</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$299,759
FY 2021 Current Budget	\$504,113
FY 2022 Projected (as requesting)	\$530,113





## FY 2022 Financial Partner Agency Board of Directors

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

**Robert Jones, Board President**

Bank of America

**Heather McCullough, President-Elect**

Society54, LLC

**Tim Beyer, Treasurer**

Financial Advisor

**Marcella Beam**

Healthy Cabarrus

**Jessica Catrodale**

Atrium Health

**Jessica Chesser**

Retired Educator

**Rev. Dr. Claude Forehand**

First Baptist Church of Kannapolis

**Seth Harward**

Financial Advisor

**Friday Pettit**

Old Vineyard Behavioral Health Services

**Captain Christian Wagner**

Charlotte-Mecklenburg Police

**Tiffany Morgan, Secretary**

Community Volunteer/Advocate

**Ashley Smith, Immediate Past President**

The Renfrew Center

**Lisa Murray Adams**

Mecklenburg County

**Mark Brumfield**

Financial Advisor

**John Cheek**

Fidus Partners

**Mary Ellen Ezarsky**

Community Volunteer/Advocate

**Andrea Gardin**

Pyramid Healthcare

**Logan McCloy**

Elliott Davis, PLLC

**Kelli Raulerson**

Bank of America



## FY 2022 Financial Partner Agency Summary

### Agency Name: My Brother's Keeper CLT-Meck

**Scope of Service:** My Brother's Keeper CLT-Meck is a national initiative established during the second term of former President Barack Obama's administration aiming to address the opportunity gap facing boys and young men of color. Specifically, My Brother's Keeper Charlotte-Mecklenburg (MBK-CLTMeck) is committed to improving outcomes for boys and young men of color by serving as the backbone organization for a collective impact effort. A Board of Directors, including representation from the city and county government, oversees the initiative and serves to lead a cross-sector city-county call to action focused on building safe and supportive systems for boys and young men of color.

MBK-CLTMeck is registered with the Obama Foundation and will receive technical assistance from the National Foundation and other national organizations. The focus includes six areas, they are: 1) Guide Vision, 2) Support Aligned Activities 3) Shared Measurement Practices 4) Build Public Will 5) Advance Policy 6) Mobilize Funding, we utilize these as a guiding focus while recruiting, equipping and measuring the volunteer and partner experience. MBK-CLTMeck focuses primarily on ages 10-21 aiming to promote career and college readiness.

#### **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.

MBKCLTMeck is designed not to compete with programs but to elevate programming that proves impact. Our collective impact model takes into account a "root-cause analysis", as well as understands the need for a result-based accountability structure that asks key questions for impact.

**FY 2021:** \$50,000

**Supports:** We co-create and plan with the schools, partners, families and most especially the boys and young men in the program to develop strategies to improve the outcomes and impact. Additionally we design and coordinate collaborative activities to develop an implementation plan for improving outcomes and impact through MBK-CLTMeck in FY 2021.

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

**Increase:** \$150,000

**Supports:** The increase provides program support towards the agency's goals to improve grades, increase attendance and reduce suspensions for participants and to demonstrate we can do this by building a more culturally competent program delivery system.

**Agency Established:** MBK-CLTMeck: 2018 Non-Profit filed for and approved 2021

**Total Years Financial Partner with City of Charlotte:** This is our first year as a new 501c3

**Population Served:** MBK-CLT Meck focuses on boys of color in 5th and 9th grade in schools in the 28208 and 28212 -zip codes CMS administrators recommend students to the program

## Objectives Report

### Corporate Scorecard Objective:

Goal	FY 2022 Target	FY 2021 Mid-Year	FY 2020 Actual
Career/College Readiness	75% of students in MBK-CLTMeck network will graduate from high school with a college or career goal	*N/a	Our objectives in FY 2021 were solely focused on defining what MBK would be in Charlotte, developing a new 501c3 organization and Board and establishing a plan/chart of work as the initiative had to re-imagine a new focus inside a public health epidemic.
Academic Improvement	60% of students who start the school year with MBK-CLTMeck will improve their GPA by end of school year	Should provide in two weeks	
Shared Data Systems	70% of agencies serving MBK-CLTMeck students will report the value of new boys of color career and college dashboard and use of the data provided	Will provide in 2 weeks	
Partner & Community Collaboration	30 partner agencies and faith-based organizations will establish a baseline for cultural competency and shared best practices	Will provide baseline in two weeks	

\*Information will be available closer to the end of the fiscal 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$146,926	\$250,000	\$75,000
Merit	\$0	\$0	\$0
Benefits	\$12,500	\$45,000	\$15,000
<b>Subtotal Personnel Expenses</b>	<b>\$159,426</b>	<b>\$295,000</b>	<b>\$90,000</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$3,500	\$5,000	\$0
Communications (e.g. publishing, marketing)	\$16,185	\$21,500	\$2,500
Partnership Investment	\$126,889	\$200,000	\$100,000
Office Supplies	\$1,500	\$2,500	\$0
Travel & Training	\$1,500	\$2,000	\$0
Technology	\$4,575	\$7,500	\$7,500
Other	\$4,500	\$7,500	\$0
<b>Subtotal Operating Expenses</b>	<b>\$158,649</b>	<b>\$246,000</b>	<b>\$110,000</b>
<b>Total Expenditures</b>	<b>\$316,575</b>	<b>\$541,000</b>	<b>\$200,000</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$250,000	\$350,000
Foundation Grants	\$40,000	\$125,000
Donor Contributions	\$26,575	\$66,000
Service Fees	\$0	\$0
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$316,575</b>	<b>\$541,000</b>

**Total Funds received from Mecklenburg County, if applicable. \$50,000 in FY 2020**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$0
FY 2021 Current Budget	\$316,575
FY 2022 Projected (as requesting)	\$541,000

## Program Budget

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$0	\$150,000
Foundation Grants	\$0	\$10,000
Donor Contributions	\$0	\$20,478
Service Fees	\$0	\$0
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$0</b>	<b>\$180,478</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$0
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0



## FY 2022 Financial Partner Agency Board of Directors

Agency Name: My Brother's Keeper CLT-Meck, Inc

**Frank Barnes**

Charlotte Mecklenburg-Schools

**Reginald Bean**

Coca-Cola Bottling Co.

**Kenneth Burton**

Bank of America

**Michael DeVaul**

YMCA of the USA

**Kevin Henry**

Extended Stay America

**Mark Jerrell**

SpeechWorks Therapy Services

**Kenston Griffin**

Dream Builders Communications, Inc

**Anthony Trotman**

Mecklenburg County

**Braxton Winston**

Levine Museum of the New South

**Eric Lewis**

One SCIC

**Raki McGregor**

Novant Health

**James Mitchell**

R J Leeper

**Greg Johnson**

Orbital Socket

**Teddy McDaniel**

Urban League of the Central Carolinas

**Jorge Millares**

Aldersgate

**Jason Terrell**

Profound Gentleman

**Todd Tibbits**

YMCA of Greater Charlotte

## FY 2022 Financial Partner Agency Summary

### Agency Name: Safe Alliance

#### Scope of Service:

The history of Safe Alliance began in 1909 when one hundred community leaders in Charlotte each pledged \$25 a year to support a new nonprofit—originally named “Associated Charities”—to provide for those in greatest need. During the past century, the organization's name has changed several times as its mission has adapted to meet the needs of the city of Charlotte. Now, in 2021, the mission of Safe Alliance is to provide hope and healing to those impacted by domestic violence and sexual assault. We accomplish this mission through four established programs: The Greater Charlotte Hope Line, Clyde & Ethel Dickson Domestic Violence Shelter, Victim Assistance Court Program, and Sexual Trauma Resource Center.

The Greater Charlotte Hope Line (980-771-HOPE) is a 24/7 hotline that provides crisis intervention, safety planning, and connection to community resources for victims of domestic violence and sexual assault. Domestic violence victims in imminent danger are referred to the Clyde & Ethel Dickson Domestic Violence Shelter, where they find a safe haven and the supportive services they need to rebuild their lives. The Victim Assistance Court Program (VACP) helps victims secure the legal protections they need to stay safe even after they leave an abusive partner and/or exit the Domestic Violence Shelter. One essential protection is a Domestic Violence Protective Order, which not only keeps adult victims safe from their abuser but also provides emergency custody of any dependent children. Finally, the Sexual Trauma Resource Center provides advocacy, hospital accompaniment, and counseling to survivors of sexual assault.

#### Mission Statement:

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

**FY 2021:** \$397,038

**Supports:** The funding supports key personnel and operational costs for the Victim Assistance Court Program (VACP), which assists victims of domestic violence with the legal protections they need to remain safe after leaving a domestic abuser. Specifically, VACP shepherds victims through a multi-step process that includes 1) filing Domestic Violence Protective Order (DVPO) paperwork, 2) having an immediate ex parte hearing to secure emergency protection and custody (if the victim has children) until the DVPO hearing, 3) a DVPO hearing, 4) a one-year DVPO renewal hearing, and 5) preparation for Family Court, which makes permanent determinations regarding property and custody. This extended legal process is what it takes to keep victims safe in the short- and long- term as they attempt to reestablish safety and rebuild their lives in the aftermath of domestic abuse.

**FY 2022 Request:** \$406,682

**Increase:** \$9,644

**Supports:** For FY22, we are requesting flat funding plus a merit allocation for staff salaries.

**Agency Established:** 1909

## Total Years Financial Partner with City of Charlotte: 41 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 60% live below the federal poverty level. At the Domestic Violence Shelter, 88% of Shelter residents live in extreme poverty, with family incomes that are less than \$10,000 annually. These residents comprise the 7% 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 homeless but still cluster near the bottom of the socioeconomic ladder. Among VACP clients, approximately 70% have incomes of less than \$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.

## Objectives Report

### Corporate Scorecard Objective: Reduce Crime

Goal	FY 2022 Target	FY 2021 Mid-Year	FY 2020 Actual
Improve safety of domestic violence victims.	Safe Alliance Victim and Court Advocates will provide 3000 safety plans.	1370	3994
Improve safety of domestic violence victims.	3,000 victims will be accompanied to court.	442	2646
Improve safety of domestic violence victims.	90% of clients will indicate an increase in their personal safety after receiving services.	92%	95%
Help crime victims by assisting with Victims Compensation paperwork and/or providing information	400 victims will receive information and/or assistance regarding Victims Compensation.	38	118

### Comments/ Explanation:

These performance measurements were also used in FY21 but the targets have been adjusted in response to programmatic changes and outcomes to date for FY21. Our targets for the first two outcomes have been decreased in response to programmatic changes resulting from COVID-19. Because of social distancing requirements, fewer victims have been able to enter our office and accordingly fewer safety plans have been provided in FY21 than projected. In FY21, our target was 4000 safety plans and we have decreased the target to 3000 for FY22. For similar reasons, we have reduced the target for the number of victims accompanied to court from 4,750 to 3000. During FY21, we have accompanied fewer victims to court than projected because, for much of this year, our advocates have not been allowed in the courtroom. Although we are hopeful to be back in court by



FY22, there is still a projected decrease due to social distancing. And while our VACP staff members are not allowed in the courtroom, they are taking the opportunity to provide other important legal services that victims always need but we rarely have the time to provide, including assistance with victim's compensation and address confidentiality and expanded child-custody work in family court settings that determine permanent custodial arrangements. By contrast, the latter two targets have been raised from last year. For the past two years, we have exceeded our target that 85% of clients will report an increase in personal safety after receiving services; thus, we have raised this target to 90%. And the increase in the final target—from 300 (in FY21) to 400 (FY22) victims receiving information about Victims Compensation (VC)—reflects a change in measurement. The majority of victims who receive info about VC do so during their initial call to the Greater Charlotte Hope Line before they are referred to other programs. Earlier reported outcomes did not include this primary source of VC information.

## 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$3,935,756	\$4,122,749	\$321,471
Merit	\$83,033	\$115,097	\$9,644
Benefits	\$1,106,695	\$1,114,374	\$70,567
<b>Subtotal Personnel Expenses</b>	<b>\$5,125,484</b>	<b>\$5,352,220</b>	<b>\$401,682</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$85,537	\$85,537	\$0
Facilities (e.g. rent, utilities)	\$387,690	\$353,991	\$5,000
Office Supplies	\$172,686	\$172,686	\$0
Travel & Training	\$66,925	\$66,925	\$0
Technology	\$130,658	\$130,658	\$0
Other	\$1,284,341	\$1,284,341	\$0
<b>Subtotal Operating Expenses</b>	<b>\$2,127,837</b>	<b>\$2,094,138</b>	<b>\$5,000</b>
<b>Total Expenditures</b>	<b>\$7,253,321</b>	<b>\$7,446,358</b>	<b>\$406,682</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$5,406,724	\$5,300,276
Foundation Grants	\$705,757	\$700,000
Donor Contributions	\$488,836	\$555,000
Service Fees	\$5,000	\$5,000
Other Revenue	\$811,950	\$850,305
<b>Total Revenues</b>	<b>\$7,418,267</b>	<b>\$7,410,581</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$1,450,210
FY 2021 Current Budget	\$1,390,730
FY 2022 Projected (as requesting)	\$1,370,560

## City Funded Program Budget

The city funded program budget represents the total expenditure and revenue budgets for the entire agency.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$685,534	\$748,196	\$321,471
Merit	\$15,895	\$22,041	\$9,644
Benefits	\$244,655	\$245,352	\$70,567
<b>Subtotal Personnel Expenses</b>	<b>\$946,084</b>	<b>1,015,589</b>	<b>401,682</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$14,546	\$14,546	\$0
Facilities (e.g. rent, utilities)	\$5,680	\$5,680	\$5,000
Office Supplies	\$41,250	\$41,250	\$0
Travel & Training	\$13,275	\$13,275	\$0
Technology	\$16,345	\$16,345	\$0
Other	\$72,833	\$73,166	\$0
<b>Subtotal Operating Expenses</b>	<b>\$163,929</b>	<b>\$164,262</b>	<b>\$5,000</b>
<b>Total Expenditures</b>	<b>\$1,110,013</b>	<b>\$1,179,851</b>	<b>\$406,682</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$955,436	\$1,095,928
Foundation Grants	\$43,977	\$17,500
Donor Contributions	\$110,638	\$66,423
Service Fees	\$0	\$0
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$1,110,051</b>	<b>\$1,179,851</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$0
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0

## FY 2022 Financial Partner Agency Board of Directors

### Agency Name: Safe Alliance

**Derek Beres**  
William Blair

**Julio Colmenares**  
CGR Creative

**Tom Coyne**  
Community Volunteer

**Linda Christopherson**  
Linda Christopherson & Associates

**Leila Evans**  
Queens Oak Advisors

**Judge Faith Fickling-Alvarez**  
North Carolina 26<sup>th</sup> Judicial District

**Sid Fletcher**  
Novant Health

**Marcy Hingst**  
Bank of America

**T. Hampton Hopkins**  
Atrium Health

**Fred Hudson**  
US Attorney's Office Western District

**Jeanne Jordan**  
Aquesta Bank

**Jeffrey Klein**  
McIntyre & Lemon, PLLC

**Becky Lindahl**  
Katten Muchin Rosenman

**Spencer Merriweather**  
Mecklenburg County DA's Office

**Allen O'Rourke**  
Robinson Bradshaw

**Markita Payne**  
Wells Fargo

**Symone Robinson**  
Habitat for Humanity Charlotte

**Melissa Romanzo**  
Hunton and Williams

**Nakia Savage**  
Habitat for Humanity Charlotte

**Scott Shannon**  
Windermere Insurance Group

**Virginia Sutton**  
Rodgers Builders

**Kimberly Zirkle**  
Moore & Van Allen



## FY 2022 Financial Partner Agency Board of Directors

### Agency Name: TreesCharlotte

#### Scope of Service:

TreesCharlotte works to increase and preserve our urban forest by engaging citizens throughout the city to plant trees at their homes, neighborhood common areas, schools, houses of faith and other non-profit properties. By the end of the FY22 planting season, we will have planted/distributed nearly 44,000 trees with the help of 20,000-plus volunteers in our 11 years as a non-profit.

Our trees will be disseminated in several ways: 1) Neighborhood plantings, which are solely focused on under-canopied areas throughout the city 2) School, church, park, other non-profit plantings, relying on help from our vast database of volunteers 3) Citywide tree giveaways, open to all Charlotte residents, who can receive up to two free trees. TreesCharlotte relies on data from the most recent (2018) canopy assessment to identify the most tree-needy areas.

#### 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 and how to plant and care for them.

TreesCharlotte's vision is 50% canopy coverage, city-wide acceptance of responsibility to plant and care for trees and sustained funding to continue the mission generation to generation.

#### TreeCharlotte Values

- Promoting benefits of trees: increasing healthy air, saving electricity, mitigating storm water runoff and creating visual beauty and shade
- Building and preserving tree canopy throughout the community with special attention to underserved areas
- Engaging diverse neighborhoods to join the effort
- Developing "ownership"
- Providing group bonding experiences
- Educational opportunities for children and adults about trees
- Collaborating with other organizations to build tree awareness
- Strong, mutually beneficial partnership with the City of Charlotte and Mecklenburg County
- Providing research focused on trees
- Financial accountability



**FY 2021:** \$100,000

**Supports:** Currently TreesCharlotte has received \$25,000 of the \$100,000 pledge for FY21. Those funds have been utilized to purchase 7-gallon trees for and stewardship of the following plantings and giveaways: Statesville Road Elementary planting, First-Timers Tree Giveaway, Barringer Academic Center stewardship, Stowe Creek Neighborwoods tree giveaway, River Oaks Academy planting, University City Zip Code Tree Giveaway, Back Creek Church planting, Thornhill Community planting and giveaway, South Meck High School planting, Galilee Center Orchard, Chapel of Christ the King Orchard, Habitat for Humanity giveaway, Bread of Life Orchard, North End Zip Code Tree Giveaway, Camino Center Tree Giveaway, Make Some Shade City-Wide Tree Giveaway, Randolph Middle School planting and East Side Zip Code Tree Giveaway.

**FY 2022 Request:** \$150,000

**Increase:** \$50,000

**Supports:** TreesCharlotte utilizes funding to plant trees and engage citizens to steward trees properly. Over the past 2 years, Charlotte has grown over 15,000 residents, many of whom come from out-of-state. Reaching these newcomers and promoting trees as a community value is central to growing our canopy. \$20,000 of the requested increase will go to marketing, education, and elevating community engagement. \$30,000 will fund planting and stewarding 300 additional trees or 6 football fields of additional canopy.

**Agency Established:** January 01, 2013

**Total Years Financial Partner with City of Charlotte:** 2 Years

**Population Served:**

TreesCharlotte is truly open to all Charlotteans. Any neighborhood that is under-canopied or at risk of becoming under-canopied is welcome to apply to our NeighborWoods program. Anybody with proof of residency is welcome to our citywide TreeStores. We serve thousands of people each year.

In addition to these widely cast nets, we work to laser 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 in hopes of doing a planting project together.

Also, our Zip Code TreeStores, where we give away trees only to residents who live in certain zip codes, are proving to be highly engaging. While every zip code in Charlotte gets its turn, these targeted events make it easier for residents to pick up trees since they are closer to where they live. In addition, they give people a higher chance of getting the trees they want since they are competing with fewer tree enthusiasts. The concept has been a big success, with sellouts in every zip code.

## Objectives Report

### Corporate Scorecard Objective:

Goal	FY 2022 Target	FY 2021 Mid-Year	FY 2020 Actual
<b>Safeguard the Environment</b>	<ul style="list-style-type: none"> <li>• 4,000 trees planted/distributed</li> <li>• Plantings/stewardships at 6 schools</li> <li>• Deliver 15 educational events</li> </ul>	<ul style="list-style-type: none"> <li>• 3,212 Trees planted/distributed</li> <li>• Planted trees at 5 schools</li> <li>• Delivered 10+ educational events</li> </ul>	<ul style="list-style-type: none"> <li>• 5,159 Trees planted/given away to plant in 2020-2021</li> <li>• Planted trees at 14 CMS/preschools schools</li> <li>• Delivered 10 educational events</li> </ul>
<b>Strengthen Neighborhoods</b>	<ul style="list-style-type: none"> <li>☐ 12 NeighborWoods plantings/distributions</li> <li>☐ Pilot Tree Care program in Revolution Park and Historic West End where TreesCharlotte and other partners assess and cover tree care costs for qualifying               <ul style="list-style-type: none"> <li>○ residents.</li> </ul> </li> </ul>	12 NeighborWoods completed by mid-year	19 NeighborWoods events
<b>Invest in Infrastructure</b>	Add trees to neighborhoods throughout Charlotte through organized plantings and tree giveaways in hopes of stemming the dramatic drop in our city's canopy.	3,212 trees planted/distributed to date	5,159 Trees planted/given away to plant in 2020-2021
<b>Enhance Education and Engagement Opportunities</b>	<ul style="list-style-type: none"> <li>• Community Tree Educator will hold 20 educational events, including a summer camp experience for children</li> <li>• The Big Tree Summit will return, with a wider array of workshops</li> <li>• A special stakeholders event will be held prior to the Big Tree Summit</li> </ul>	With the help of a Knight Foundation grant, TreesCharlotte has hired a Community Tree Educator to conduct workshops, presentations, school visits, etc. and teach citizens about the importance of trees. In the new hire's first four months, she conducted at least 10 educational events.	Conducted 5 educational events, including our annual Big Tree Summit

## 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 2022 Financial Partner applications.

FY 2021- FY 202 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$301,655	\$350,000	\$0
Merit	\$0	\$0	\$0
Benefits	\$0	\$0	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$301,655</b>	<b>\$350,000</b>	<b>\$0</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$30,000	\$20,000	\$30,000
Facilities (e.g. rent, utilities)	\$0	\$0	\$0
Office Supplies	\$10,000	\$10,500	\$0
Travel & Training	\$5,000	\$5,000	\$0
Technology	\$0	\$0	\$0
Other	\$289,700	\$285,000	\$120,000
<b>Subtotal Operating Expenses</b>	<b>\$334,700</b>	<b>\$320,500</b>	<b>\$150,000</b>
<b>Total Expenditures</b>	<b>\$636,355</b>	<b>\$670,500</b>	<b>\$150,000</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$215,500	\$162,500
Foundation Grants	\$200,000	\$200,000
Donor Contributions	\$500,000	\$560,000
Service Fees	\$0	\$0
Other Revenue	\$100,000	\$100,000
<b>Total Revenues</b>	<b>\$1,015,500</b>	<b>\$1,022,500</b>

### Total Funds received from Mecklenburg County, if applicable.

Fiscal Year	Total Funds
FY 2020 Prior Year	\$8,110
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0





## FY 2022 Financial Partner Agency Board of Directors

Agency Name: TreesCharlotte

**Thruston Morton**  
Global Endowment Management

**Marcus Jones**  
City of Charlotte

**Robert A. Bartlett**  
Bartlett Tree Experts

**Paul Kardous**  
ROW

**Sam Bowles**  
Threadridge Investment Partners

**Lori Collins-Luski**  
Collins Climate Consulting

**Peggy Brookhouse**  
Luquire George Andrews

**Susan McDonough**  
Civic Leader

**Kodwo Ghartey-Tagoe**  
Duke Energy

**Susan McKeithen**  
Civic Leader

**Mary Hall**  
Atrium Health

**Rolfe Neill**  
Civic Leader **John Petrone**  
SouthWood Corporation

**Rob Harrington**  
Robinson, Bradshaw, and Hinson, P.A.

**Stoney Sellars**  
StoneLaurel

**Johnny Harris**  
Lincoln Harris

**Marcia Simon**  
Paul Simon Women

**Kathryn Heath**  
Flynn Heath Holt Leadership

**Chris Thomas**  
Childress Klein Properties



## FY 2022 Financial Partner Agency Summary

### Agency Name: UNC Charlotte Urban Institute/Institute for Social Capital (New Funding Request)

**Scope of Service:** The Institute for Social Capital (ISC), a signature research initiative of the UNC Charlotte Urban Institute, increases community data and research capacity in order to drive evidence-informed decisions and track results. ISC securely integrates individual level data across organizations and institutions including Charlotte-Mecklenburg Schools, Mecklenburg County Department of Social Service, Cardinal Innovations, and over 40 other data partners. Our most pressing problems including the pandemic, community violence, persistent racial inequity, and a lack of economic mobility span our organizational and sector silos. Too often, however, data about our challenges and the effectiveness of our solutions are locked within organizations and the insights available across community data sources are never realized. ISC unlocks and integrates data for community benefit. Data integrated across agencies, sectors, and programs allows community stakeholders to understand challenges, act on opportunities, and develop more effective partnerships.

#### **Mission Statement:**

ISC's mission and the purpose of the data integration is to increase the community's capacity for data-informed decision-making and advance university research that impacts the community and deepens understanding of complex community issues.

**FY 2021:** \$0

**FY 2022 Request:** \$250,000

#### **Supports:**

City funding will support data infrastructure improvements, specifically an enhanced data linking and integration platform, a data warehouse, and web interface to serve data depositors and end-users. Improvements will support the scaling of ISC to increase the use of integrated data to inform programs and policy. As a part of a larger investment initiative, \$250,000 is being requested from the City as well as Mecklenburg County, in addition to requests to the private sector, to support this technical infrastructure.

**Agency Established:** December 15, 2004

**Total Years Financial Partner with City of Charlotte:** 0 Years

**Population Served:** ISC serves multiple stakeholders in the City of Charlotte and Mecklenburg County. By integrating data on individuals across service silos, ISC facilitates research that can provide a nuanced understanding of multifaceted challenges like community violence, homelessness and housing instability, and lack of economic mobility. The research can also examine the effectiveness of interventions to address community problems. Insight gained can inform policy and program decision-making, including the use of funding to support effective solutions, ultimately benefiting individuals in our community from those experiencing a crisis to those working to solve them.

## 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$853,175	\$0	\$0
Merit	\$0	\$0	\$0
Benefits	\$185,743	\$0	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$1,038,918</b>	<b>\$0</b>	<b>\$0</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$52,208	\$0	\$0
Facilities (e.g. rent, utilities)	\$0	\$0	\$0
Office Supplies	\$3,717	\$0	\$0
Travel & Training	\$17,569	\$0	\$0
Technology	\$0	\$0	\$250,000
Other	\$0	\$0	\$0
<b>Subtotal Operating Expenses</b>	<b>\$73,494</b>	<b>\$0</b>	<b>\$250,000</b>
<b>Total Expenditures</b>	<b>\$1,112,412</b>	<b>\$0</b>	<b>\$250,000</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$222,607	\$0
Foundation Grants	\$55,486	\$0
Donor Contributions	\$0	\$0
Service Fees	\$0	\$0
Other Revenue	\$213,306	\$0
<b>Total Revenues</b>	<b>\$491,399</b>	<b>\$0</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$55,000
FY 2021 Current Budget	\$55,000
FY 2022 Projected (as requesting)	\$0



## FY 2022 Financial Partner Agency Board of Directors

### Agency Name: UNC Charlotte Urban Institute/Institute for Social Capital

**Rebecca Hefner - President**

Director of Data Analytics  
City of Charlotte

**James E. S. (Jesh) Humphrey IV - Secretary**

Vice Chancellor and General Counsel  
UNC Charlotte

**Frank Barnes**

Chief Accountability Officer  
Charlotte-Mecklenburg Schools

**Ellison Clary**

Board Member  
UNC Charlotte Foundation

**Virginia Covill**

Vice President, Research & Impact  
Communities in Schools of Charlotte-Mecklenburg

**Doug Hague**

Executive Director, School of Data Science  
UNC Charlotte

**Melvin Herring**

Program Director, Masters of Social Work Program  
Johnson C. Smith University

**Jared Lawrence**

Vice President, Customer Operations  
Duke Energy

**Mtu Pugh**

Senior Director, Enterprise Strategy  
Lowe's Companies, Inc.

**Anthony Trotman**

Deputy County Manager & Consolidated Human Services Agency Director  
Mecklenburg County

**Laurie Whitson**

Director, Mecklenburg Community Operations Center  
Cardinal Innovations Healthcare

**Raquel Lynch - Vice President**

Chief Program Officer  
Goodwill Industries of the Southern Piedmont

**Tom Hartman - Treasurer**

Assistant Director of Treasury Services  
UNC Charlotte

**Charleston Carter**

Trial Court Administrator  
Trial Court Administrator's Office District 26

**Brian Collier**

Executive Vice President  
Foundation For The Carolinas

**Kathryn Firmin-Sellers**

Chief Impact Officer  
United Way of Central Carolinas

**Gibbie Harris**

Director, Public Health  
Mecklenburg County

**Donald Jonas**

Assistant Vice President Social Strategy & Impact  
Atrium Health

**Joan Lorden**

Provost  
UNC Charlotte

**Louis (Lou) A. Trosch, Jr.**

Superior Court Judge  
26<sup>th</sup> Judicial District Court

**Jennifer (Jenny) Ward**

Senior Vice President, Community Operations Center  
Bank of America

## FY 2022 Financial Partner Agency Summary

### Agency Name: Women's Business Center of Charlotte

#### Scope of Service:

The Women's Business Center of Charlotte (WBCC) is one of four programs hosted by the Institute. The Institute is a statewide nonprofit with a mission to build the asset base among limited resource populations through research, information, education, training, and business development. The Institute administers innovative programs and initiatives to address the business development needs of its clients. The WBCC provides substantive training for women interested in starting businesses (pre-venture & startup), micro-business, and small and medium businesses.

The Vision of the NC Institute is to create Economic Prosperity for Diverse Populations. We believe business diversity is critical to a healthy economy, and that race, gender, or geography should not be barriers to opportunity and prosperity. We create a more equitable ecosystem for minority and women owned businesses (MWBs) and their communities through entrepreneurial education, training, business coaching, connections to capital and relationships, and advocacy. The focus of this proposal is our Women's Business Center (WBC) of Charlotte, a unique resource that helps more than 900 MWBs annually overcome barriers to success and sustainability.

Programs at the WBCC support the success of small business startup, growth, and stabilization. Our programs encompass training to encourage innovation, collaboration, and align with the City's Strategic Purposes. We are proud that our programs are time relevant and lead small businesses to solutions. Our financial session empowers small businesses with the knowledge to understand how to calculate overhead, as well how to understand and become astute with comprehending major financial statements. The WBCC has relationships with over 28 Resource and Community Leaders including but not limited to CVMSDC, Prosper, CBI, NC Works, the Latin American Chamber of Commerce, NMBAA, and Wake Forest University. We also partner with business owners that are subject matters experts including but not limited in the fields of Legal Assistance, Finance, Accounting, HR, Project Management, Risk Management that can bring innovative approaches to scalability and expansion.

The Women's Business Center in partnership with the City have offered various Certification Trainings to increase contracting opportunities with primes and government bids. The procurement process can be stifling for Small Businesses, our programs help small businesses navigate through sometimes murky and unclear processes. In addition, our counseling staff is experienced with technical support for accessing capital and have been successful with lending \$1.3M in CARES ACT Funding and \$2.4M in the past four years. We know what banks are looking for and we help and assist the clients in achieving success with loan applications, this is in alignment with the City of Charlotte's strategy for overcoming lending disparities.

Supporting small businesses means supporting the community. Research shows that small business are more likely to hire local talent, as a result local residents put money back in to the community, creating not just wealth but an economic stabilization within their community. When small businesses win the City wins, when the City wins, the families win, which is one of the top goals of the City of Charlotte. Additionally, research shows that small businesses are more inclined to give back to nonprofit organization, which are essential components to a healthy community.

**Mission Statement:**

The mission of the NC Institute of Minority Economic Development (The Institute) is to strengthen the asset base of diverse populations through policy, education, and 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 throughout its 12 County District and the Charlotte Combined Statistical Area (CSA) with OPPORTUNITIES that help women entrepreneurs achieve business goals by providing "In-depth – substantive out-come oriented business services; as well provide IMPACTFUL educational training opportunities that stimulate growth for small/women/minority, and veteran businesses.

**FY 2021 Request:** \$50,000

**FY 2022 Request:** \$50,000

**Increase:** \$0

**Supports:** The ongoing online webinar training, workshops, and programs offered by WBCC. Funding will be used for the 2021 Small Business Funding w/QuickBooks Series, the purchase of technology and equipment for the development of Podcasting, office space, marketing, ERGO dynamic friendly office equipment, virtual conference platforms, administration support, and execution of four signature programs.

The Women's Business Center of Charlotte facilitates and host nearly 85-100 FREE workshops throughout the year-additionally funding will support the virtual training space for seminars. The Women's Business Center is passionate about remaining technologically relevant, funding will aid in purchasing up-to-date software that engages our audience and clients with easy-to-use applications as well as supports our 2022 growth strategy to increase our reach and enhance our customer experience: such software will include but not be limited to new Webinar Platforms, Learning Management & Event Management Database, as well as funding for marketing and administrator oversight.

Activities and programs across the WBCC will cover

- Mentoring.
- Procurement assistance.
- Business counseling.
- Training.
- Understanding Healthy Finances - Financial assistance.
- Surety bonding.
- Other 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)

According to a survey conducted by Cox Business - several reasons why entrepreneurs believe that starting a small business is right for them, is because entrepreneurs want to be more hands, they want more money and independence, they want to work for themselves to create generational wealth, and because they started a hobby that become lucrative. However, research shows that 42% of small business 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.

WBCC Counseling team walks the business owner through the necessary process of understanding how to build a strong business infrastructure. We work with our 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 barriers, creating budgets, building a business plan, and assisting them to understand their value proposition so they are setting the correct pricing structure, and more.

Essentially, 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 foundation.

**Agency Established: 2016**

**Total Years Financial Partner with City of Charlotte: 2 Years**

**Population Served:**

The overall Agency provides capacity building, business, and professional development training for all M/WSBE. The Women's Business Center of Charlotte is passionate about elevating, empowering, inspiring and encouraging Women. As a result of the effects of COVID-19, our 2020 YE data reflects an even greater need for continued support in the areas of business startup, maintenance & sustainability, access to capital, and business development training. On a national level the amount of business closures due to COVID-19 rose again this last quarter total business closures are 20.4M small businesses. In addition, nearly ½ of the small business seeking Capital were not able to obtain it due to insufficient basic accounting principles. The PANDEMIC accentuated the areas of deficiencies in Small Business from HR to Financial Management.

In 2020 we provided services to over 1300 Entrepreneurs/Business owners with one-on-one Counseling and Training opportunities of which over 1,092 were Women – over 70% were African American women, 15% were Caucasian, 1% were Hispanic and 14% are non-responsive. The WBCC's clients and core competencies are to serve woman. Our client's range in the age groups of 30yrs - 65yrs. Our client are educated with some level of college or carries a master's degree in a specialized subject. Their desire is to transition from Corporate America, and from home. Her salary ranges from \$35K - \$120K. Generally, 6% are Pre-venture clients (not in business), 34% are Startup clients (<3yrs old), 20% are Micro businesses (>3yr <10 employees); 8% are Small & Medium size businesses (>3 >10 employees). Our clients are 85% African American; 12% White and 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 nearly 26% of our client's annual sales are \$0 - \$25,000k.

The majority (90%) of our clients are from the Charlotte Statistical Area with the exception of those Counties in SC. The WBCC services clients in Anson, Alexander, Catawba, Cabarrus, Cleveland, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Stanly, and Union Counties.

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

## Objectives Report

### Corporate Scorecard Objective:

Goal	FY 2022 Target	FY 2021 Mid-Year	FY 2020 Actual
Clients seeking assistance with access to capital	\$100,000 and 5 transactions	\$318,000 or 15 transactions	\$1.75M in capital funding and 35 small business transactions (200%)
The hours of training business owners engage, participate and receive for development	1,000 training hours	4,200 training hours	Over 200% or 8,644 training hours provided in fiscal period
Clients seeking assistance with professional development endeavoring to gain knowledge regarding business processes, business plan development, marketing, branding, personal development, management and more through training	Total target 698 clients serviced	112 unique clients trained (19%) 624 total attendees in training (90%)	200% or 1310 unique clients trained with a total of 1,920 attendees participating in training for fiscal period
Existing and Startup businesses seeking counseling assistance with business strategies	100 Clients becoming competent in feasibility, business strategy	36 clients counseled	132 clients counseled
Clients seeking assistance with business startup – jobs retained and jobs created	15 Business Starts 52 Jobs Created 13 Jobs Retained	1 Business Start 0 Jobs Created 0 Jobs Retained	19 Business Starts 25 Jobs Created 50 Jobs Retained

### Comments/ Explanation:

City funding in the amount of \$50,000 will represent 16% of the WBCC's Budget. These funds are critically important to the sustainability of the Center's strategic direction for supporting and building MWSBE's capacity. Funding will be used to support programming and operations and part time human capital. The city funds have allowed and afforded the WBCC the ability to continue to



operate the center's programs as well as work closely with the City's Business Inclusion (CBI) certification departments, and other resource partners in the region. Collectively, WBCC are supplying and providing the small business ecosystem with valuable tools, resources, and strategies for business growth and development. We have witnessed first-hand the struggle small businesses face with insufficient procurement knowledge, understanding lease agreement, implementing contingency plans, and creating PIVOT strategy. Our government contracting program successfully supported 11 small businesses in becoming certified, as well as develop a capability statement. Certification increases contractual opportunities, which ultimately leads to scalability of the business.

WBCC routinely coordinates and partner with local and statewide organizations such as the City of Charlotte, Latin American Chamber of Commerce-Charlotte, NBMBA, Charlotte Alliance, Prospera, NC Veteran Business Association, Carolinas & Virginia Minority Supplier Development Council, and others. We also stay connected with the state's Small Business Development Center network, the SBA's Charlotte office, the NC Department of Commerce, NC Department of Revenue, Secretary of State and CDFIs like Self-Help and CSBDF. Ongoing partnership with these partners helps us to best leverage our core competencies and limit duplication of services, particularly related to providing direct financial resources.

The WBCC is in a unique position, we have strong partnership with organizations and business such as Fifth Third Bank, Wells Fargo, Worth Financial, Bank of OZK, Department of Transportation, BBT& SUNTRUST, and other. Over the past four years, through these partnerships, the WBCC and its clients have benefitted as a recipient of financial support for continued business development of small businesses. Supporting local businesses is good for the environment; local businesses are more accountable to their local communities donate more money to non-profits, hire more local employees, and support other small businesses.

As a result, this year alone the WBCC was awarded \$42,500 from LISC, \$50,000 from 5th 3rd, \$30,000 from WELLS FARGO, to support local and small businesses develop. For sustainability outside of the City Funding, it is our ongoing goal to continue partnerships with organizations that understand the importance of developing small businesses, realize smaller business help to create and sustain jobs, are committed to stimulating the local economy, and have made a commitment to enhance our economic and social climate. In addition, the WBCC offer fee base programming for a nominal fee as well as annual conferences that support the ongoing development of small business through Entrepreneur, Procurement, Industry, and Lifestyle Mind and Body. With all of the issues with COVID-19 and social unrest the WBCC will continue to support Mindfulness session to ease the tension and stress of their clients.

## 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$846,945	\$1,791,501	\$0
Merit	\$0	\$0	\$0
Benefits	\$189,673	\$353,636	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$1,036,618</b>	<b>\$2,145,137</b>	<b>\$0</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$8,600	\$0	\$0
Communications (e.g. publishing, marketing)	\$33,040	\$49,113	\$0
Facilities (e.g. rent, utilities)	\$113,300	\$589,899	\$0
Office Supplies	\$15,950	\$17,600	\$0
Travel & Training	\$63,064	\$40,050	\$0
Technology	\$48,000	\$0	\$0
Other	\$827,496	\$1,911,012	\$0
<b>Subtotal Operating Expenses</b>	<b>\$1,109,450</b>	<b>\$2,607,674</b>	<b>\$0</b>
<b>Total Expenditures</b>	<b>\$2,146,068</b>	<b>\$4,752,811</b>	<b>\$0</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$801,230	\$951,500
Foundation Grants	\$175,000	\$1,132,650
Donor Contributions	\$120,000	\$623,000
Service Fees	\$241,190	\$1,166,491
Other Revenue	\$619,550	\$909,617
<b>Total Revenues</b>	<b>\$1,956,970</b>	<b>\$4,783,258</b>

### Total Funds received from Mecklenburg County, if applicable.

Fiscal Year	Total Funds
FY 2010 Prior Year	\$0
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0

## City Funded Program Budget

The city funded program budget represents the total expenditure and revenue budgets for the entire agency.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$219,795	\$135,517	\$15,000
Merit	\$0	\$0	\$0
Benefits	\$35,897	\$14,922	\$6,500
<b>Subtotal Personnel Expenses</b>	<b>\$255,692</b>	<b>\$150,439</b>	<b>\$21,500</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$3,000
Communications (e.g. publishing, marketing)	\$9,570	\$3,513	\$3,000
Facilities (e.g. rent, utilities)	\$36,068	\$27,600	\$15,000
Office Supplies	\$12,700	\$3,500	\$2,500
Travel & Training	\$16,350	\$3,500	\$1,500
Technology	\$0	\$5,500	\$3,500
Other	\$280,200	\$105,948	\$0
<b>Subtotal Operating Expenses</b>	<b>\$354,888</b>	<b>\$149,561</b>	<b>\$28,500</b>
<b>Total Expenditures</b>	<b>\$610,580</b>	<b>\$300,000</b>	<b>\$50,000</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$460,580	\$150,000
Foundation Grants	\$33,950	\$73,150
Donor Contributions	\$0	\$58,250
Service Fees	\$80,000	\$0
Other Revenue	\$36,068	\$18,600
<b>Total Revenues</b>	<b>\$610,598</b>	<b>\$300,000</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$50,000
FY 2021 Current Budget	\$50,000
FY 2022 Projected (as requesting)	\$50,000



## FY 2022 Financial Partner Agency Board of Directors

Agency Name: Women's Business Center of Charlotte

**Tyrone Baines**

American Honda Motor Company

**Martin Eakes**

Self-Help/Center for Responsible Lending

**Edward Fort**

NC Agricultural & Technical State University

**Lori Jones Gibbs**

PNC Bank

**Michael Goodman**

Capitol Broadcasting Company, Inc

**Adam Klein**

Capitol Broadcasting Company, Inc

**Will C. Mann**

Wells Fargo

**Lewis H. Myers**

Perkins+Will

**Sue Malone**

Strategies for Small Business

**Troy Roberts**

Alliance of Professionals & Consultants, Inc

**Michael Suggs**

Goler CDC

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## GENERAL FUND

## DEDICATED REVENUE

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## FY 2022 Financial Partner Agency Summary

Agency Name: Charlotte Center City Partners

### Scope of Service:

As an innovative, respected and trusted economic and community development organization, Charlotte Center City Partners leads the evolution of Charlotte Center City (Uptown, South End and Midtown) to a thriving, beloved place with opportunity for all. We act as a convener on top issues in the urban core, imagine opportunities beyond what exists and develop strategic partnerships in and beyond our Center City and city.

### Mission Statement:

The mission of CCCP is to boldly envision and activate strategies and actions that will assure Charlotte Center City is a welcoming and equitable, economically vibrant, culturally rich and beloved place for all.

**FY 2021:** \$5,810,182

**Supports:** Economic, and cultural development of Charlotte's Center City and South End. Funding is based on Municipal Service Districts 1-4 tax revenue.

**FY 2022 Request:** Requesting a total of \$6,201,323 in proposed funding for FY22, budgeted at 98.5% of projections.

**Increase:** \$391,141

**Supports:** Economic, and cultural development of Charlotte's Center City and South End. Funding is based on Municipal Service Districts 1-4 tax revenue.

**Agency Established:** 1979

**Total Years Financial Partner with City of Charlotte:** 42 Years

### Population Served:

Residents, visitors, employees and employers in Uptown, South End and part of Midtown.

## 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$2,578,197	\$2,704,463	\$2,704,463
Merit	\$31,229	\$69,478	\$69,478
Benefits	\$799,116	\$822,701	\$822,701
<b>Subtotal Personnel Expenses</b>	<b>\$3,408,542</b>	<b>\$3,596,642</b>	<b>\$3,596,642</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$203,000	\$203,000	\$203,000
Facilities (e.g. rent, utilities)	\$245,340	\$245,340	\$245,340
Office Supplies	\$30,000	\$30,000	\$30,000
Travel & Training	\$133,350	\$133,350	\$133,350
Technology	\$100,700	\$100,700	\$89,200
Other	\$2,172,569	\$2,376,917	\$1,903,791
<b>Subtotal Operating Expenses</b>	<b>\$2,884,959</b>	<b>\$3,089,307</b>	<b>\$2,604,681</b>
<b>Total Expenditures</b>	<b>\$6,293,501</b>	<b>\$6,685,949</b>	<b>\$6,201,323</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government	\$0	\$0
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$0
Service Fees	\$0	\$0
Other Revenue	\$293,500	\$293,500
<b>Total Revenues</b>	<b>\$293,500</b>	<b>\$293,500</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$200,000
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0



## FY 2022 Financial Partner Agency Board of Directors

### Agency Name: Charlotte Center City Partners

**Jennifer Appleby**

Wray Ward

**Clay Armbrister**

Johnson C. Smith University

**TBD**

Arts & Science Council

**Malcomb Coley**

Ernest & Young Charlotte

**Jesse Cureton**

Novant Health

**Dr. Kandi Deitemeyer**

Central Piedmont Community College

**Dena Diorio**

Mecklenburg County

**Kodwo Gharthey-Tagoe**

Duke Energy

**George Dunlap**

Mecklenburg County

**Rob Engel**

Wells Fargo Securities

**Tom Finke**

Adaraq Acquisition Corp

**David Furman**

Centro CityWorks

**Tom Glick**

Carolina Panthers

**Malcolm Graham**

City of Charlotte

**Johno Harris**

Lincoln Harris

**Mark Holoman**

Cousins Properties

**Taiwo Jaiyeoba**

City of Charlotte

**Marcus Jones**

City of Charlotte

**Sam Judd**

Asana Partners

**Janet LaBar**

Charlotte Regional Business Alliance

**Tiffani Lewis**

Entrepreneur

**Carol Lovin**

Atrium Health

**Dr. Michael Marsicano**

Foundation for the Carolinas

**Diane Morais**

Ally Bank

**William Rogers**

Truist Financial Corporation

**Tom Murray**

Charlotte Regional Visitors Authority

**Tom Nelson**

National Gypsum

**Cindy Noble**

Compass Group, North America

**Mike Praeger**

AvidXchange

**Ernie Reigel**

Moore & Van Allen

**Pat Riley**

Allen Tate Companies

**Pat Rodgers**

Rodgers

**Terry Shook**

Shook Kelley

**Darrel Williams**

Neighboring Concepts

**Earnest Winston**

Charlotte-Mecklenburg Schools

**Dr. Cheryl Richards**

Johnson & Wales University, Charlotte



## FY 2022 Financial Partner Agency Summary

### Agency Name: Charlotte Regional Visitors Authority

#### **Scope of Service:**

The Charlotte Regional Visitors Authority (CRVA) manages and promotes Charlotte's publicly-owned assembly facilities, which include the Charlotte Convention Center, Bojangles' Coliseum, Ovens Auditorium, the NASCAR Hall of Fame, and specific contracted services with Spectrum Center and Charlotte Douglas International Airport. CRVA engages in new or expanded activities and programs aiding and encouraging convention and visitor promotion to the Charlotte region as a travel and tourism destination and in business development activities associated with tourism and organizations that sponsor or hold events, meetings, or conventions in the Charlotte area.

#### **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.

**FY 2021 Funding:** \$17,546,420

**Supports:** The Charlotte Regional Visitors Authority leads the effort to develop assets, destination amenities and infrastructure that drive increased visitor demand and position Charlotte as a leader among competitive destination cities.

**FY 2022 Funding Request:** \$18,072,813

**Increase:** \$526,393

**Supports:** CRVA's funding is determined by projected growth in dedicated prepared Food & Beverage and Occupancy Tax and supports promoting Charlotte as a travel, convention, and tourism destination and conducts business development activities associated with tourism.

**Agency Established:** 1951

**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.

## 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$20,616,635	\$21,235,134	\$5,876,651
Merit	\$0	\$0	\$0
Benefits	\$8,803,462	\$9,067,566	\$2,403,734
<b>Subtotal Personnel Expenses</b>	<b>\$29,420,097</b>	<b>\$30,302,700</b>	<b>\$8,280,385</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$6,842,530	\$5,155,000	\$0
Communications (e.g. publishing, marketing)	\$10,182,499	\$10,487,974	\$4,631,438
Facilities (e.g. rent, utilities)	\$6,448,868	\$6,642,334	\$448,046
Office Supplies	\$1,103,306	\$1,136,405	\$77,549
Travel & Training	\$1,727,636	\$1,779,465	\$1,154,908
Technology	\$0	\$0	\$0
Other	\$16,982,211	\$17,491,677	\$3,480,488
<b>Subtotal Operating Expenses</b>	<b>\$43,287,050</b>	<b>\$42,692,855</b>	<b>\$9,792,429</b>
<b>Total Expenditures</b>	<b>\$72,707,147</b>	<b>\$72,995,555</b>	<b>\$18,072,814</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2020 Current Budget	FY 2021 Projected Budget
Government Grants	\$35,022,845	\$36,662,420
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$0
Fund Balance Draw	\$2,494,567	\$1,870,121
Other Revenue	\$35,189,735	\$34,463,015
<b>Total Revenues</b>	<b>\$72,707,147</b>	<b>\$72,995,556</b>

### Total Funds received from Mecklenburg County, if applicable.

Fiscal Year	Total Funds
FY 2020 Prior Year	\$410,000
FY 2021 Current Budget	\$150,000
FY 2022 Projected (as requesting)	\$150,000

## City Funded Program Budget-CRVA Visit Charlotte

The city funded program budget represents the total expenditure and revenue budgets for the entire agency.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$5,705,486	\$5,876,651	\$5,876,651
Merit	\$0	\$0	\$0
Benefits	\$2,333,722	\$2,403,734	\$2,403,734
<b>Subtotal Personnel Expenses</b>	<b>\$8,039,208</b>	<b>\$8,280,385</b>	<b>\$8,280,385</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$6,872,726	\$7,078,908	\$4,631,438
Facilities (e.g. rent, utilities)	\$434,996	\$448,046	\$448,046
Office Supplies	\$75,290	\$77,549	\$77,549
Travel & Training	\$1,121,270	\$1,154,908	\$1,154,908
Technology	\$0	\$0	\$0
Other	\$3,379,115	\$3,480,488	\$3,480,488
<b>Subtotal Operating Expenses</b>	<b>\$11,883,397</b>	<b>\$12,239,899</b>	<b>\$9,792,429</b>
<b>Total Expenditures</b>	<b>\$19,922,605</b>	<b>\$20,520,284</b>	<b>\$18,072,814</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$17,546,420	\$18,072,813
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$0
Fund Balance Draw	\$1,378,185	\$1,449,720
Other Revenue	\$998,000	\$997,750
<b>Total Revenues</b>	<b>\$19,922,605</b>	<b>\$20,520,283</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$260,000
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0



## FY 2022 Financial Partner Agency Board of Directors

Agency Name: Charlotte Regional Visitors Authority

**Clark Allen**

Clark Allen Events

**Kimberly Edmonds**

Global Impact Industries, LLC

**Emma Allen**

State Farm

**Mike Evans**

Evans Rembert Political Consultants

**Karen Bentley**

Bentley Consulting Group, LLC

**Ervin Gourdine**

Discovery Place

**Boris Bunich**

Beacon Investment Management Group

**Bridgette-Anne Hampden**

JHR & Associates LLC

**Dockery Clarke**

Blue Cap Marketing

**Vinay Patel**

SREE Hotels

**Tom Dolan**

J.W. Marriott

**Tom Sasser**

Harper's Restaurant Group

**Jon Dressler**

Rare Roots Hospitality



## FY 2022 Financial Partner Agency Summary

### Agency Name: Charlotte Regional Visitors Authority

### *Film Commission*

#### **Scope of Service:**

The Charlotte Regional Visitors Authority (CRVA) manages and promotes Charlotte's publicly-owned assembly facilities. CRVA engages in new or expanded activities and programs aiding and encouraging convention and visitor promotion to the Charlotte region as a travel and tourism destination and in business development activities associated with tourism and organizations that sponsor or hold events, meetings, or conventions in the Charlotte area. CRVA also promotes the Charlotte Region as a location for film and commercial/television productions. Through the Charlotte Regional Film Commission, the CRVA provides site location, crew, equipment, stage, and support service information for commercials, independent films, television series, and still photography shoots.

#### **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.

**FY 2021:** \$150,000

**Supports:** Operations of the Film Commission.

**FY 2022 Request:** \$150,000

**Increase:** \$0. The agency is not requesting a funding increase.

**Agency Established:** 1951

**Total Years Financial Partner with City of Charlotte:** 68 Years

#### **Population Served:**

The CRVA Film Commission works to deliver experiences that uniquely enrich the lives of Charlotte's visitors and residents. Through leadership in destination development, marketing and venue management expertise, the CRVA Film Commission leads efforts to maximize the region's economic potential through the film industry.

## Overall Agency Budget

The city funded program budget represents the total expenditure and revenue budgets for the entire agency.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$20,616,635	\$21,235,134	\$74,870
Merit	\$0	\$0	\$0
Benefits	\$8,803,462	\$9,067,566	\$32,078
<b>Subtotal Personnel Expenses</b>	<b>\$29,420,097</b>	<b>\$30,302,700</b>	<b>\$106,948</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$6,842,530	\$5,155,000	\$0
Communications (e.g. publishing, marketing)	\$10,182,499	\$10,487,974	\$13,102
Facilities (e.g. rent, utilities)	\$6,448,868	\$6,642,334	\$0
Office Supplies	\$1,103,306	\$1,136,405	\$618
Travel & Training	\$1,727,636	\$1,779,465	\$16,102
Technology	\$0	\$0	\$0
Other	\$16,982,211	\$17,491,677	\$13,230
<b>Subtotal Operating Expenses</b>	<b>\$43,287,050</b>	<b>\$42,692,855</b>	<b>\$43,052</b>
<b>Total Expenditures</b>	<b>\$72,707,147</b>	<b>\$72,995,555</b>	<b>\$150,000</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$35,022,845	\$36,662,420
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$0
Fund Balance Draw	\$2,494,567	\$1,870,121
Other Revenue	\$35,189,735	\$34,463,015
<b>Total Revenues</b>	<b>\$72,707,147</b>	<b>\$72,995,556</b>

### Total Funds received from Mecklenburg County, if applicable.

Fiscal Year	Total Funds
FY 2020 Prior Year	\$410,000
FY 2021 Current Budget	\$150,000
FY 2022 Projected (as requesting)	\$150,000

## City Funded Program Budget - CRVA Film Commission

The city funded program budget represents the total expenditure and revenue budgets for the entire agency.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$140,650	\$144,870	\$74,870
Merit	\$0	\$0	\$0
Benefits	\$62,212	\$64,078	\$32,078
<b>Subtotal Personnel Expenses</b>	<b>\$202,862</b>	<b>\$208,948</b>	<b>\$106,948</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$26,200	\$26,986	\$13,102
Facilities (e.g. rent, utilities)	\$0	\$0	\$0
Office Supplies	\$600	\$618	\$618
Travel & Training	\$35,050	\$36,102	\$16,102
Technology	\$0	\$0	\$0
Other	\$30,321	\$31,231	\$13,230
<b>Subtotal Operating Expenses</b>	<b>\$92,171</b>	<b>\$94,937</b>	<b>\$43,052</b>
<b>Total Expenditures</b>	<b>\$295,033</b>	<b>\$303,885</b>	<b>\$150,000</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants	\$150,000	\$150,000
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$0
Service Fees	\$0	\$0
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$150,000</b>	<b>\$150,000</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$150,000
FY 2021 Current Budget	\$150,000
FY 2022 Projected (as requesting)	\$150,000





## FY 2022 Financial Partner Agency Board of Directors

Agency Name: Charlotte Regional Visitors Authority

### *Film Commission*

**Clark Allen**

Clark Allen Events

**Kimberly Edmonds**

Global Impact Industries, LLC

**Emma Allen**

State Farm

**Mike Evans**

Evans Rembert Political Consultants

**Karen Bentley**

Bentley Consulting Group, LLC

**Ervin Gourdine**

Discovery Place

**Boris Bunich**

Beacon Investment Management Group

**Bridgette-Anne Hampden**

JHR & Associates LLC

**Dockery Clarke**

Blue Cap Marketing

**Vinay Patel**

SREE Hotels

**Tom Dolan**

J.W. Marriott

**Tom Sasser**

Harper's Restaurant Group

**Jon Dressler**

Rare Roots Hospitality

## FY 2022 Financial Partner Agency Summary

### Agency Name: University City Partners

#### Scope of Service:

University City Partners (UCP) is a Municipal Service District- 5 and works to promote, encourage, and coordinate the University City region's long-term economic vitality as a center for education, commerce, shopping, and entertainment. University City Partners enhances communication to build community visibility for the area and is engaged in ensuring the continuing economic viability of University City by promoting it as an excellent place to live, work, learn, and play; by advocating on behalf of the area's infrastructure needs; by preparing the area for multimodal transportation; by emphasizing University City's role as the heart of the larger two-county area; by encouraging economic development and smart growth through regional planning; and by identifying and facilitating cross-jurisdictional planning to enhance the area.

#### Mission Statement:

To develop, sponsor, and support projects, programs and initiatives that sustain the economic vitality of the University City region.

**FY 2021:** \$1,090,489

**Supports:** Economic Developments activities in Municipal Service District 5.

**FY 2022 Request:** \$1,121,435

**Increase:** \$30,946

**Supports:** City funding for UCP is determined by projected growth in dedicated property tax revenue in Municipal Service District 5.

University City Partners works to enhance the vitality of University City in these ways:

- COLLECT, ANALYZE and SHARE data and information about University City to inform decisions and INVITE investment
- MARKET University City as a technology centric employment center with great access and resources for entrepreneurs;
- RECRUIT business, GROW business, ATTRACT talent
- PROMOTE and BRAND University City as a remarkable and safe community to live, work, play and learn;
- ACTIVATE and CONVENE our community through events, programming and activities including Charlotte KidsFest, University City Wine Fest, University City Farmers Market at the Lake, Food Truck Friday at the Cow, and Movies at the IKEA Green;
- PLAN, EXECUTE and ENVISION to achieve best land use, highest quality development and maximized investment in University City;
- INVEST in our public realm to celebrate UNC Charlotte as our anchor, brand University City through wayfinding signage system, enhance public spaces with art, and maintain clean and welcoming streets;

- ADVOCATE and COMMUNICATE with our residents, workers, owners & investors, visitors, students, businesses and institutions and engage them in the work we do and the community we are building.

Our program of work for FY21-22 are strategies that support achievement of these priorities:

#### ENABLE TRANSPORTATION THAT ALIGNS WITH COMMUNITY VISION

- Congestion Mitigation
- Mobility investments around URP and Innovation Park
- Improve arterials visually & functionally
- Last mile connectivity – Transportation onDemand
- Expand trails, multi-use trails, bike lanes, sidewalks

#### CREATE STRONG CENTERS

- Build parks & libraries as anchors
- Develop mix of housing
- Invest in public realm
- Develop/Implement wayfinding signage system
- Convene community through placemaking, events, programs and civic activities

#### SUSTAIN AND GROW BUSINESS

- Continue to build data resources for CRE industry
- Inform/facilitate redevelopment
- Retain, grow and recruit business to support University City vitality
- Execute Clean Streets, Clean Community program

#### STRENGTHENING SAFE COMMUNITIES

- Community Safety Collaborative program
- Advocate and secure adequate resources
- Communicate intentionally to influence perception
- Use of technology to create efficiency of resources

The incremental increase in funds from FY21 to FY22 is needed to support a weekly farmers market in University City that runs May through October. We have reprioritized other funds to support the farmers market, but a gap of approximately \$22,000 remains. Annual surveys show that the farmers market is the most requested programming by our community.

**Agency Established:** 2003

**Total Years Financial Partner with City of Charlotte:** 19 Years

**Population Served:**

Promotes University City's long-term economic vitality as a regional center for education, commerce, shopping, and entertainment within Municipal Service District 5.

## Objectives Report

### Corporate Scorecard Objective: Workforce and Business Development

Goal	FY 2022 Target	FY 2022 Mid-Year	FY 2021 Actual
Promote University City as a technology centric employment center, emphasizing research and entrepreneurial advances in University City.	Pitch and communicate 15 news releases and e-newsletter stories quarterly	8	100%
Promote and support business growth via CRE/broker interactions.	Increase broker interactions by 5% year over year (leads and response to inquiries)	>2%	100%
Be a trusted source for economic development by maintaining and driving users to UCP website to support business and investment growth.	Measure increase in website utilization targeting 5% increase year over year	>2%	Website under construction.
Shift perception as “back office center” per workplace/business study in partnership with City Economic Development.	Develop and execute communications strategy to change perception.	50% complete	NEW
Demonstrate/validate value of investment and growth in University City via annual development report.	Track investment annually to produce annual development report	50% complete	100%
Convene community through successful execution of events to demonstrate vitality of community; Execute community perception surveys	Minimum 2 community events Seasonal farmers market	1 event	100% execution under COVID parameters Farmers market launched

**Corporate Scorecard Objective: Transportation, Planning and Development**

Goal	FY 2022 Target	FY 2022 Mid-Year	FY 2021 Actual
Advance transportation and planning priorities via consistent and effective communications with municipal partners.	Quarterly meetings with Transportation and P&D staff/committees to advance priorities	50%	100%
Advocate and secure investment in mobility infrastructure via CIP planning and implementation.	Investments for University City included in CIP plan	advancement	NEW
Create identity and directional infrastructure via investment in wayfinding signage.	5 signs installed	advancement	5
Develop first mile/last mile, TDM strategy with implementation plan.	Frameworks for draft strategy	advancement	NEW
Enhance mobility experience via greenway improvements.	Install 1 environment and placemaking improvement in partnership with UNC Charlotte Botanical Garden.	advancement	NEW
Increase mobility safety by closing gaps in missing infrastructure.	1 gap addressed	advancement	NEW

**Corporate Scorecard Objective: Safe Communities**

Goal	FY 2022 Target	FY 2022 Mid-Year	FY 2021 Actual
Major corridors have clean streets relatively free of litter with properly maintained lawns and trees.	Right of way maintenance contract metrics with weekly maintenance	>25 weeks exemplary service	100%
Convene business and security agencies to support community safety and policing.	Quarterly meetings, quarterly updates.	2	100%
Participate in initiatives collaboratively with CMPD to enhance safety.	2 new initiatives annually	1	1
Promote use of MyCMPD app to publics.	5% adoption over other divisions 5% increase in Crimestoppers tips	>2% adoption and 2% Crimestoppers tips	NEW

**Corporate Scorecard Objective: Great Neighborhoods**

Goal	FY 2022 Target	FY 2022 Mid-Year	FY 2021 Actual
Advocate and promote mix of housing types in new development.	2 new housing developments permitted or built with mix of housing types	advancement	2
	1 new development with affordable units permitted or built	advancement	1

**Corporate Scorecard Objective: Well Managed Government**

Goal	FY 2022 Target	FY 2022 Mid-Year	FY 2021 Actual
Leadership in financial stewardship, best practices, consistency in approach that is accountable, customer focused and inclusive.	Clean audit	EOY	100%
	Exceptional performance; within budget expectations		
	Engaged and informed board of directors via semi-monthly meetings	50%	100%
	Annual survey on priorities and performance.	Planned	complete

**Comments/ Explanation:** University City Partners raises sponsorship funding to support community events. These funds are contributed to the University City Foundation, a separate 501C3 organization with a separate board. University City Partners has a few members on that board. UCP staff raised \$100,000 of additional sponsorship support to produce Charlotte KidsFest, University City Winefest and New Years Day 5K. University City Partners funds and hires the events production team to produce all of the events.

## 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 2022 Financial Partner applications.

FY 2021-FY 2022 Expenditures			
Category	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>			
Salaries	\$358,666	\$368,386	\$368,386
Merit	\$32,000	\$34,000	\$34,000
Benefits	\$30,680	\$31,600	\$31,600
<b>Subtotal Personnel Expenses</b>	<b>\$421,346</b>	<b>\$433,986</b>	<b>\$433,986</b>
<b>Operating</b>			
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$2,500	\$2,500	\$2,500
Facilities (e.g. rent, utilities)	\$79,000	\$79,600	\$79,600
Office Supplies	\$9,000	\$10,000	\$10,000
Travel & Training	\$15,000	\$15,600	\$15,600
Technology	\$10,550	\$12,000	\$12,000
Other	\$597,060	\$604,749	\$567,749
<b>Subtotal Operating Expenses</b>	<b>\$713,110</b>	<b>\$724,449</b>	<b>\$687,449</b>
<b>Total Expenditures</b>	<b>\$1,134,456</b>	<b>\$1,158,435</b>	<b>\$1,121,435</b>

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government	\$1,099,445	\$1,121,435
Foundation Grants	\$0	\$0
Donor Contributions	\$0	\$0
Service Fees	\$0	\$0
Other Revenue	\$35,000	\$37,000
<b>Total Revenues</b>	<b>\$1,134,445</b>	<b>\$1,158,435</b>

**Total Funds received from Mecklenburg County, if applicable.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$0
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0



## FY 2022 Financial Partner Agency Board of Directors

Agency Name: University City Partners

**Stuart Parks**

The Arden Group

**Betty Doster**

UNC Charlotte

**Richmond Baker**

Microsoft

**Renee Perkins Johnson**

City of Charlotte

**George Dunlap**

Mecklenburg County

**Michael Fung**

Wells Fargo

**Kati Hynes**

CRBA

**Tom Creter**

Fox Sports

**Todd Dunn**

Duke Energy

**John Grogan**

Electrolux

**Bill Leonard**

Atrium University City Hospital

**Tracy Dodson**

City of Charlotte

**Ryan Wetherington**

Armstrong

**Taiwo Jaiyeoba**

City of Charlotte

**Leslie Johnson**

Mecklenburg County

**Phil Nicholenko**

TIAA

**Lat Purser**

Lat Purser and Associates

**Jane Wu**

Panorama Holdings

**Shannon Dixon**

Casto

**Clay Andrews**

UNC Charlotte-CRI



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## HOUSING AND NEIGHBORHOOD SERVICES

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## FY 2022 Financial Partner Agency Summary

**Agency Name: Carolina Care Partnership**

### **Scope of Service:**

Carolinas CARE Partnership (CCP) is dedicated 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 a wide array of housing resources in the ten-county MSA that includes: Anson, Cabarrus, Chester, Gaston, Iredell, Lancaster, Mecklenburg, Rowan, Union and York. The following housing and supportive services are provided: short-term assistance for rent, utilities and mortgages; residential substance abuse treatment; end-of-life residential care; supportive services (ie: case management, mental health services; and permanent housing placement); tenant-based rental assistance; facility based housing; housing information services; and resource identification activities that identify affordable housing. During FY 2021, Carolinas CARE Partnership awarded restricted grant funding to fifteen (15) agencies for the development, enhancement, and advancement of housing 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 2021:** \$2,860,489

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

**FY 2022 Request:** \$2,913,407

[Note: FY22 HOPWA award to Carolinas CARE Partnership is an estimate based on the FY21 HOWPA grant awarded by Housing & Urban Development (HUD).]

**Increase:** \$52,918

**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:** 22 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.

## Objectives Report

### Corporate Scorecard Objective:

Goal	FY 2022 Target	FY 2021 Mid-Year	FY 2020 Actual
Increase the number of households in the MSA assisted with HOPWA funding	680	504	696

## Overall Agency Budget

Provide overall agency expense and revenue budget information for entire agency including all programs and funding sources. For purposes of this application, the budget information provided should coincide with the City's fiscal year, July 1 through June 30.

Expenditures FY 2021- FY 2022				
Category	FY 2020 Actual	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>				
Salaries	\$931,220	\$1,118,529	\$1,108,891	\$587,574
Merit	\$0	\$0	\$0	\$0
Benefits	\$250,058	\$329,213	\$332,667	\$176,272
<b>Subtotal Personnel Expenses</b>	<b>\$1,181,278</b>	<b>\$1,447,742</b>	<b>\$1,441,558</b>	<b>\$763,846</b>
<b>Operating</b>				
Capital Equipment (e.g. laptop/computer purchase)	\$2,140	\$1,000	\$1,000	\$0
Communications (telephone/internet, printing/publishing, postage, marketing/branding)	\$16,135	\$20,710	\$22,781	\$16,000
Facilities (Occupancy)	\$81,524	\$84,584	\$86,924	\$55,000
Office Supplies	\$18,902	\$22,868	\$25,154	\$5,000
Travel & Training	\$56,498	\$59,250	\$59,250	\$38,140
Technology (including monthly/annual fees for software, licenses, etc)	\$23,857	\$27,043	\$31,100	\$15,000
Other	\$1,733,047	\$2,157,221	\$2,279,848	\$2,020,421
<b>Subtotal Operating Expenses</b>	<b>\$1,932,103</b>	<b>\$2,372,676</b>	<b>\$2,506,057</b>	<b>\$2,149,561</b>
<b>Total Expenditures</b>	<b>\$3,113,381</b>	<b>\$3,820,418</b>	<b>\$3,947,615</b>	<b>\$2,913,407</b>

## Overall Agency Budget

Please include all revenues, excluding revenues received from the City of Charlotte and Mecklenburg County, in the fields below.

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants & Funding	\$486,825	\$486,825
Foundation Grants & Funding	\$5,000	\$5,000
Donor Contributions	\$1,000	\$1,000
Service Fees (rents)	\$127,911	\$127,911
Other Revenue	\$131,027	\$107,500
<b>Total Revenues</b>	<b>\$751,763</b>	<b>\$728,236</b>

Indicate the amount of total funds received from Mecklenburg County, if applicable for each fiscal year listed below.

Fiscal Year	Total Funds
FY 2020 Prior Year	\$291,419
FY 2021 Current Budget	\$293,981
FY 2022 Projected (as requesting)	\$305,972

## City Funded Program Budget

If requesting City-funds for a specific program within your agency, provide the expenses and revenue budget information for the specified program including all funding sources. For purposes of this application, the budget information provided should coincide with the City's fiscal year, July 1 through June 30.

Expenditures FY 2021- FY 2022				
Category	FY 2020 Actual	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>				
Salaries	\$433,562	\$581,371	\$587,574	\$587,574
Merit	\$0	\$0	\$0	\$0
Benefits	\$126,119	\$174,411	\$176,272	\$176,272
<b>Subtotal Personnel Expenses</b>	<b>\$559,681</b>	<b>\$755,782</b>	<b>\$763,846</b>	<b>\$763,846</b>
<b>Operating</b>				
Capital Equipment (laptop computers)	\$853	\$1000	\$0	\$0
Communications (postage, printing, telephone/internet, publishing, marketing)	\$16,490	\$13,017	\$16,000	\$16,000
Facilities (occupancy)	\$44,067	\$50,428	\$55,000	\$55,000
Office Supplies	\$1,735	\$2,380	\$5,000	\$5,000
Travel & Training	\$28,262	\$38,140	\$38,140	\$38,140
Technology including annual/monthly fees)	\$14,693	\$12,450	\$15,000	\$15,000
Other	\$1,418,356	\$1,901,477	\$2,020,421	\$2,020,421
<b>Subtotal Operating Expenses</b>	<b>\$1,524,456</b>	<b>\$2,018,892</b>	<b>\$2,149,561</b>	<b>\$2,149,561</b>
<b>Total Expenditures</b>	<b>\$2,084,137</b>	<b>\$2,774,674</b>	<b>\$2,913,407</b>	<b>\$2,913,407</b>



## City Funded Program Budget

**Please include all revenues, excluding revenues received from the City of Charlotte and Mecklenburg County, in the fields below.**

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants & Funding	\$0	\$0
Foundation Grants & Funding	\$0	\$0
Donor Contributions	\$0	\$0
Service Fees	\$127,911	\$127,911
Other Revenue	\$0	\$0
<b>Total Revenues</b>	<b>\$127,911*</b>	<b>\$127,911</b>

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

**Indicate the amount of total funds received from Mecklenburg County, if applicable for each fiscal year listed below.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$0
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0





**FY 2022 Financial Partner Agency Board of Directors**  
**Agency Name: Carolinas Care Partnership**

**Jane Clark (Board V-Chair)**

CARE Consulting Group

**Jeffrey Van Houtte**

Kohl's

**Frank Dorsey**

Johnson C. Smith University

**Richard Grimstad**

Community Advocate

**Vontina McGrant (Board Chair)**

Knee-High Children's Learning Center

**Richard Mills**

CREW Program

**Tonia Trammell (Treasurer)**

The Legal Aid of North Carolina

## FY 2022 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, 25% of customers who visited the agency seeking financial assistance for the first time ever. For FY 2022, it is estimated that families requesting utility assistance will greatly increase. The average CEA amount for FY 2021 is \$295 per household.

For FY 2021, at the City's request and to provide assistance due to COVID-19, the Emergency Rental Assistance (ERA) program funds were allocated to the Utility Assistance for water. In years past, 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, thereby restricting the amount of City funds used to an average ERA amount.

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 2021:** \$425,000

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

**FY 2022 Request:** \$525,000 [Utility Assistance - \$180,000/Rental Assistance - \$345,000]

**Increase:** \$100,000

**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.

## Objectives Report

### Corporate Scorecard Objective:

Goal	FY 2022 Target	FY 2021 Mid-Year	FY 2020 Actual
Provide households with energy assistance	1,000	*549	1,008
Provide households with rental assistance	660	*0	710

*\*Note: At the City's request for FY 2021, after the grant was awarded, the City of Charlotte rental assistance funds for FY 2021 were allocated to the Utility Assistance for water.*

## Overall Agency Budget

Provide overall agency expense and revenue budget information for entire agency including all programs and funding sources. For purposes of this application, the budget information provided should coincide with the City's fiscal year, July 1 through June 30.

Expenditures FY 2021- FY 2022				
Category	FY 2020 Actual	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>				
Salaries	\$4,368,368	\$4,174,501	\$4,300,000	\$31,500
Merit	\$663,132	\$781,703	\$750,000	\$0
Benefits	\$273,177	\$361,726	\$339,324	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$5,304,677</b>	<b>\$5,317,930</b>	<b>\$5,389,324</b>	<b>\$31,500</b>
<b>Operating</b>				
Communications (e.g. publishing, marketing)	\$104,565	\$148,210	\$149,692	\$0
Travel & Training	\$51,063	\$75,800	\$76,558	\$0
Facilities (e.g. rent, utilities)	\$305,083	\$302,800	\$305,828	\$0
Technology (including monthly/annual fees for software, licenses, etc)	\$322,516	\$297,575	\$300,551	\$0
Fees & Services	\$372,069	\$808,894	\$508,471	\$0
Other (Please submit document with a breakdown of other)	\$124,398	\$140,925	\$158,900	\$0
<b>Subtotal Operating Expenses</b>	<b>\$1,279,694</b>	<b>\$1,774,204</b>	<b>\$1,500,000</b>	<b>\$0</b>
Direct Client Aid	\$6,607,199	\$10,525,461	\$7,155,791	\$493,500
Client Aid-Materials	\$1,980,246	\$2,708,333	\$3,250,000	\$0
<b>Total Expenditures</b>	<b>\$15,171,816</b>	<b>\$20,325,928</b>	<b>\$17,295,115</b>	<b>\$525,000</b>

## Overall Agency Budget

**Please include all revenues, excluding revenues received from the City of Charlotte and Mecklenburg County, in the fields below.**

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants & Funding	\$7,672,899	\$7,129,865
Foundation Grants & Funding	\$1,282,576	\$1,282,576
Donor Contributions	\$5,578,538	\$4,807,674
Donor Contributions – In Kind	\$2,863,333	\$3,405,000
Other Revenue	\$394,598	\$670,000
<b>Total Revenues</b>	<b>\$17,791,944</b>	<b>\$17,295,115</b>
Less: City & County Revenues	(\$3,979,865)	(\$4,079,865)
<b>Total Revenues (Excluding City &amp; County Revenues)</b>	<b>\$13,812,079</b>	<b>\$13,215,250</b>

**Indicate the amount of total funds received from Mecklenburg County, if applicable for each fiscal year listed below.**

Fiscal Year	Client Aid	Operating	Total Funds
FY 2020 Prior Year	\$1,833,900	\$1,720,965	\$3,554,865
FY 2021 Current Budget	\$1,833,900	\$1,720,965	\$3,554,865
FY 2022 Projected (as requesting)	\$1,833,900	\$1,720,965	\$3,554,865

## City Funded Program Budget

If requesting City-funds for a specific program within your agency, provide the expenses and revenue budget information for the specified program including all funding sources. For purposes of this application, the budget information provided should coincide with the City's fiscal year, July 1 through June 30.

Expenditures FY 2021- FY 2022				
Category	FY 2020 Actual	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>				
Salaries	\$2,400,269	\$2,919,805	\$2,949,003	\$31,500
Merit	\$361,430	\$437,115	\$441,486	\$0
Benefits	\$152,285	\$201,206	\$203,218	\$0
<b>Subtotal Personnel Expenses</b>	<b>\$2,913,984</b>	<b>\$3,558,126</b>	<b>\$3,593,707</b>	<b>\$31,500</b>
<b>Operating</b>				
Communications (publishing, marketing)	\$22,316	\$28,587	\$28,873	\$0
Travel & Training	\$10,494	\$27,000	\$27,270	\$0
Facilities (e.g. rent, utilities)	\$68,409	\$72,321	\$73,044	\$0
Technology	\$137,574	\$141,720	\$143,137	\$0
Fees & Services	\$94,769	\$27,202	\$27,474	\$0
Other	\$48,083	\$42,291	\$42,714	\$0
<b>Subtotal Operating Expenses</b>	<b>\$381,645</b>	<b>\$339,121</b>	<b>\$342,512</b>	<b>\$0</b>
Direct Client Aid	\$6,496,097	\$10,375,461	\$7,005,791	\$493,500
<b>Total Expenditures</b>	<b>\$9,791,726</b>	<b>\$14,272,708</b>	<b>\$10,942,010</b>	<b>\$525,000</b>

## City Funded Program Budget

**Please include all revenues, excluding revenues received from the City of Charlotte and Mecklenburg County, in the fields below.**

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
Government Grants & Funding	\$7,672,899	\$7,129,865
Foundation Grants & Funding	\$1,207,609	\$786,860
Donor Contributions	\$5,299,598	\$2,932,683
Donor Contributions – In Kind	\$62,601	\$62,601
Other Revenue	\$30,000	\$30,000
<b>Total Revenues</b>	<b>\$14,272,707</b>	<b>\$10,942,009</b>
Less: City & County Revenues	(\$3,979,865)	(\$4,079,865)
<b>Total Revenues (Excluding City &amp; County Revenues)</b>	<b>\$10,292,842</b>	<b>\$6,862,144</b>

**Indicate the amount of total funds received from Mecklenburg County, if applicable for each fiscal year listed below.**

Fiscal Year	Client Aid	Operating	Total Funds
FY 2020 Prior Year	\$1,833,900	\$1,720,965	\$3,554,865
FY 2021 Current Budget	\$1,833,900	\$1,720,965	\$3,554,865
FY 2022 Projected (as requesting)	\$1,833,900	\$1,720,965	\$3,554,865



## FY 2022 Financial Partner Agency Board of Directors

Agency Name: Crisis Assistance Ministry

**Melissa Agnew**

LPL Financial

**Andrew Ladd**

Communities in Schools

**Mitchell Baldwin**

Mecklenburg Community Church

**Michael Martino**

Wells Fargo

**Stuart Christhilf (Treasurer)**

Pamlico Capital

**Alexis McDaniel**

LPL Financial

**Sarah Coble**

Nucor

**Steve Newmark**

Roush-Fenway Racing

**Tanqueray Edwards (Secretary)**

JLL (Jones Lang LaSalle)

**Stewart Proffitt**

Proffitt Dixon Partners

**Quentin Fogan (Vice Chair)**

Bank of America Merrill Lynch

**Lisa Quisenberry (Chair)**

Community Volunteer

**Wendy Franklin**

Atrium Health

**Nikhil Sawant**

Foundation For The Carolinas

**Jarrold Jones**

Charlotte Mecklenburg Housing Partnership

**Joe Taylor**

Centerland Capital

**Brad Winer**

Winer Family Foundation





## FY 2022 Financial Partner Agency Summary

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

**(formerly Charlotte Mecklenburg Housing Partnership)**

### **Scope of Service:**

DreamKey Partners, Inc. 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, DreamKey Partners 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. DreamKey Partners primarily serves families earning up to 80 percent of annual median income (AMI). Average income of DreamKey Partners' homeowners is 60 percent or less of AMI. The agency provides seminar and informational sessions such as: "Homeownership 101", training for mortgage loan officers, and attorneys to advertise the program.

### **Mission Statement:**

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

**FY 2021:** \$2,091,000

- \$1,860,000 Affordable Housing
- \$231,000 House Charlotte

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

**FY 2022 Request:** \$2,241,000.

- \$1,960,000 Affordable Housing
- \$281,000 House Charlotte

**Increase:** \$150,000

**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:** 31 Years

### **Population Served:**

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

## Objectives Report

### Corporate Scorecard Objective: Affordable Housing

Goal	FY 2022 Target	FY 2021 Mid-Year	FY 2020 Actual
Number of affordable units constructed/acquired/rehabilitated	100	70	388

### Corporate Scorecard Objective: House Charlotte

Goal	FY 2022 Target	FY 2021 Mid-Year	FY 2020 Actual
Increase the creation and retention utilization of "House Charlotte" program funding	300	157	314

## Overall Agency Budget

Provide overall agency expense and revenue budget information for entire agency including all programs and funding sources. For purposes of this application, the budget information provided should coincide with the City's fiscal year, July 1 through June 30.

FY 2021-FY 2022 Expenditures				
Category	FY 2020 Actual	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>				
Salaries	\$3,274,900	\$3,575,130	\$4,020,366	\$625,500
Merit	\$0	\$0	\$0	\$0
Benefits	\$746,500	\$795,470	\$859,141	\$145,500
<b>Subtotal Personnel Expenses</b>	<b>\$4,021,400</b>	<b>\$4,370,600</b>	<b>\$4,879,507</b>	<b>\$771,000</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$1,470,000	\$1,470,000	\$1,470,000	\$1,470,000
Communications (publishing, marketing)	\$45,400	\$70,500	\$268,540	\$0
Facilities (e.g. rent, utilities)	\$282,400	\$283,040	\$285,480	\$0
Office Supplies	\$32,800	\$34,850	\$34,850	\$0
Travel & Training	\$125,270	\$129,950	\$129,750	\$0
Technology (including monthly/annual fees for software, licenses, etc)	\$89,100	\$83,000	\$83,000	\$0
Other	\$8,301,627	\$2,273,061	\$1,382,968	\$0
<b>Subtotal Operating Expenses</b>	<b>\$10,346,597</b>	<b>\$4,344,401</b>	<b>\$3,654,588</b>	<b>\$1,470,000</b>
<b>Total Expenditures</b>	<b>\$14,367,997</b>	<b>\$8,715,001</b>	<b>\$8,534,095</b>	<b>\$2,241,000</b>

## Overall Agency Budget

**Please include all revenues, excluding revenues received from the City of Charlotte and Mecklenburg County, in the fields below.**

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 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>

**Indicate the amount of total funds received from Mecklenburg County, if applicable for each fiscal year listed below.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$0
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0

## Overall Program Budget – Affordable Housing

If requesting City-funds for a specific program within your agency, provide the expenses and revenue budget information for the specified program including all funding sources. For purposes of this application, the budget information provided should coincide with the City's fiscal year, July 1 through June 30.

FY 2021-FY 2022 Expenditures				
Category	FY 2020 Actual	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>				
Salaries	\$3,039,700	\$3,371,940	\$3,626,688	\$399,300
Merit	\$0	\$0	\$0	\$0
Benefits	\$689,500	\$748,670	\$754,153	\$90,700
<b>Subtotal Personnel Expenses</b>	<b>\$3,729,200</b>	<b>\$4,120,610</b>	<b>\$4,380,841</b>	<b>\$490,000</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$1,470,000	\$1,470,000	\$1,470,000	\$1,470,000
Communications (e.g., publishing, marketing)	\$44,800	\$69,300	\$267,340	\$0
Facilities (e.g. rent, utilities)	\$245,800	\$246,440	\$248,880	\$0
Office Supplies	\$30,100	\$30,650	\$30,650	\$0
Travel & Training	\$122,370	\$129,950	\$129,750	\$0
Technology	\$83,000	\$83,000	\$83,000	\$0
Other	\$8,301,627	\$2,270,621	\$1,373,928	\$0
<b>Subtotal Operating Expenses</b>	<b>\$10,297,697</b>	<b>\$4,299,961</b>	<b>\$3,603,548</b>	<b>\$1,470,000</b>
<b>Total Expenditures</b>	<b>\$14,026,897</b>	<b>\$8,420,571</b>	<b>\$7,984,389</b>	<b>\$1,960,000</b>

## Overall Program Budget – Affordable Housing

**Please include all revenues, excluding revenues received from the City of Charlotte and Mecklenburg County, in the fields below.**

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 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>

**Indicate the amount of total funds received from Mecklenburg County, if applicable for each fiscal year listed below.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$0
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0

## Overall Program Budget – House Charlotte

If requesting City-funds for a specific program within your agency, provide the expenses and revenue budget information for the specified program including all funding sources. For purposes of this application, the budget information provided should coincide with the City's fiscal year, July 1 through June 30.

FY 2021-FY 2022 Expenditures				
Category	FY 2020 Actual	FY 2021 Budget	FY 2022 Projected Budget	FY 2022 City Request
<b>Personnel</b>				
Salaries	\$235,200	\$203,190	\$393,678	\$226,200
Merit	\$0	\$0	\$0	\$0
Benefits	\$57,000	\$46,800	\$104,988	\$54,800
<b>Subtotal Personnel Expenses</b>	<b>\$292,200</b>	<b>\$249,990</b>	<b>\$498,666</b>	<b>\$281,000</b>
<b>Operating</b>				
Capital Equipment (e.g. vehicles, computers)	\$0	\$0	\$0	\$0
Communications (e.g. publishing, marketing)	\$600	\$1,200	\$1,200	\$0
Facilities (e.g. rent, utilities)	\$36,600	\$36,600	\$36,600	\$0
Office Supplies	\$2,700	\$4,200	\$4,200	\$0
Travel & Training	\$2,900	\$0	\$0	\$0
Technology (including annual/monthly fees)	\$6,100	\$0	\$0	\$0
Other	\$0	\$2,440	\$9,040	\$0
<b>Subtotal Operating Expenses</b>	<b>\$48,900</b>	<b>\$44,440</b>	<b>\$51,040</b>	<b>\$0</b>
<b>Total Expenditures</b>	<b>\$341,100</b>	<b>\$294,430</b>	<b>\$549,706</b>	<b>\$281,000</b>

## Overall Program Budget – House Charlotte

**Please include all revenues, excluding revenues received from the City of Charlotte and Mecklenburg County, in the fields below.**

FY 2021-FY 2022 Revenues		
Revenues	FY 2021 Current Budget	FY 2022 Projected Budget
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>

**Indicate the amount of total funds received from Mecklenburg County, if applicable for each fiscal year listed below.**

Fiscal Year	Total Funds
FY 2020 Prior Year	\$0
FY 2021 Current Budget	\$0
FY 2022 Projected (as requesting)	\$0





**FY 2022 Financial Partner Agency Board of Directors**  
**Agency Name: DreamKey Partners, Inc.**  
**(formerly Charlotte Mecklenburg Housing Partnership)**

Ms. Nicole

Baldoni Mr. Gene

Boycott  
(Secretary/Treasurer)

Ms. Astrid Chirinos

Ms. Elyse Dashew

Ms. Amanda K. Deweese, ARP

Mr. David R. Finnie, CPA

Judge Linwood O. Foust

Mr. Kevin Granelli

Mr. Rickey Hall

Ms. Jessica Beil Hindman

Mr. Chris Jackson

Mr. Dave Kautter

Ms. Patsy Kinsey

Mr. Raymond (Raki) McGregor

Mr. James Mitchell

Ms. Jacqueline O'Garrow (Chair)

Mr. Winston A. Robinson

Mr. Ken Schorr

Mr. James R. Simpson (Vice Chair)

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## FY 2022

# OUT OF SCHOOL TIME PARTNERS

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## FY 2022 Out of School Time Partners Summary

Out of School Time (OST) Partners provide after school enrichment services to children from low-to-moderate income families. Agencies participate in a Request for Proposal (RFP) process to request financial partner funding. The OST program has historically provided a maximum grant of \$200,000 annually, or \$1,200 per eligible student served, whichever is less.

Due to current economic uncertainty and core service funding priorities, the OST program is being reviewed during the FY 2022 budget development process. The FY 2022 RFP was released as a one-year RFP for organizations to receive up to \$1,200 per eligible youth up to a maximum of \$200,000 per organization. In addition, for this proposal organizations were asked to provide two alternates by detailing within their proposal how they would operate if funding were reduced to a maximum of \$150,000 and to a maximum of \$100,000.

FY 2022 Out of School Time (OST) Partner Funding		
Agency	FY 2021	FY 2022 Proposed*
Alliance Center for Education (formerly Bethlehem Center)	\$126,000	\$90,000
Charlotte Community Services Association	\$126,000	n/a
Greater Enrichment Program	\$200,000	\$200,000
WINGS for Kids	\$200,000	n/a
YMCA Central Carolinas	\$200,000	n/a
Our BRIDGE for KIDS	n/a	\$120,000
Police Activities League (PAL)	n/a	\$72,000
<b>TOTALS</b>	<b>\$852,000</b>	<b>\$482,000</b>

FY 2022 Out of School Time (OST) Partner Funding		
Alternative Funding Request		
Agency	FY 2022 Alternative A (\$150,000 maximum)	FY 2022 Alternative B (\$100,000 maximum)
Bethlehem Center (now Alliance Center for Education)	\$90,000	\$90,000
Greater Enrichment Program	\$150,000	\$100,000
Our BRIDGE for KIDS	\$120,000	\$100,000
Police Activities League (PAL)	\$72,000	\$72,000
<b>TOTALS</b>	<b>\$432,000</b>	<b>\$362,000</b>

\*Recommended for potential funding consideration through Out of School Time Partner RFP process



## **FY2022 Out of School Time Partners Funding Request**

### **Agency Name: Alliance Center for Education (formerly The Bethlehem Center of Charlotte)**

#### **Scope of Service**

Alliance Center for Education (AC4Ed), formerly known as The Bethlehem Center, has been providing out of school time services to low income children and youth in Charlotte for 54 years. Their mission is to provide educational opportunities for children and families to improve the quality of their lives, serving grades K-12. AC4Ed's year-round program seeks to help students develop skills that aid in decision making, encourage volunteerism and increase enrollment in college/career-path training. Weekly activity contains teacher/tutor-led enrichment in literacy, math, science, art, social studies, and technology as well as group activities in leadership, character building, career exploration, team building, problem solving, healthy living, cultural awareness and financial literacy. AC4Ed also offers services (direct and through partnerships) to the students' caregivers to better equip them to support the achievement of their student's success in school and in life.

#### **Performance**

<b>Measure</b>	<b>FY2020 Year-End Actual</b>	<b>FY2021 Mid-Year Actual</b>	<b>FY2022 Target</b>
Number of students to be served	76	101	75

#### **Financial Information**

**Funding Source(s):** Community Development Block Grant (CDBG)

<b>FY2021 City Funding</b>	<b>FY2022 City Funding Request</b>
\$126,000	\$90,000

#### **Summary/Highlights of Agency Request**

Alliance Center for Education, formerly known as The Bethlehem Center, is a current City OST Partner within the FY21 funding cycle with an award amount of \$126,000. This funding request is part of the City's OST RFP process which utilizes an Evaluation Committee comprised of Housing & Neighborhood Services (HNS) staff, and representatives within the community with expertise in child and youth development, who conducted program evaluations and staff interviews with all RFP respondents. Recommendations for funding are made based on the outcome of this evaluation and shared with Charlotte City Council for consideration.

The City's OST Program awards \$1,200 per child served, up to a maximum of \$200,000, to qualifying agencies that run a program where each youth served is required to attend five days per week, at a minimum of three hours per day on each day that Charlotte-Mecklenburg Schools is in operation with or without a summer program.

Generally, OST Funding represents approximately 1/3 of program costs for agencies. The OST Program, per CDBG guidelines, allows agencies to use City funds for various program delivery costs.



## FY2022 Out of School Time Partners Funding Request

### Agency Name: Greater Enrichment Program

#### Scope of Service

The Greater Enrichment Program (GEP), has been providing out-of-school time programming in Charlotte-Mecklenburg since 1975. GEP's mission is to provide an out-of-school time educational program that is fun and enjoyable for eligible (low-income) school-age (K - 6<sup>th</sup> Grade) students and their parents in which, regardless of their background and abilities, they fully realize their potential for academic achievement, cultural/social enrichment, positive self-esteem and productive citizenship. The program includes a healthy snack/meal, homework assistance, literacy and science, technology, engineering and math (STEM) instructions, physical fitness, cultural enrichment, parent workshops and family events, and a safe ride home.

GEP has multiple sites across Charlotte, through partnerships within our community and with Charlotte-Mecklenburg Schools, and is requesting the City fund three of their program sites that serve students at Ashley Park Academy, Merry Oaks International Academy, and Niner University Elementary at Amay James.

#### Performance

Measure	FY 2020 Year-End Actual	FY 2021 Mid-Year Actual	FY 2022 Target
Number of students to be served	279	62	167

#### Financial Information

**Funding Source(s):** Community Development Block Grant (CDBG)

FY 2021 City Funding	FY 2022 City Funding Request
\$200,000	\$200,000

#### Summary/Highlights of Agency Request

GEP has been a City OST Partner for more than 20 years and is currently being funded within the FY21 funding cycle with an award amount of \$200,000. This funding request is part of the City's OST RFP process which utilizes an Evaluation Committee comprised of Housing & Neighborhood Services (HNS) staff, and representatives within the community with expertise in child and youth development, who conducted program evaluations and staff interviews with all RFP respondents. Recommendations for funding are made based on the outcome of this evaluation and shared with Charlotte City Council for consideration.

The City's OST Program awards \$1,200 per child served, up to a maximum of \$200,000, to qualifying agencies that run a program where each youth served is required to attend five days per week, at a minimum of three hours per day on each day that Charlotte-Mecklenburg Schools is in operation with or without a summer program.

Generally, OST Funding represents approximately 1/3 of program costs for agencies. The OST Program, per CDBG guidelines, allows agencies to use City funds for various program delivery costs.



## FY2022 Out of School Time Partners Funding Request

### Agency Name: Our BRIDGE for KIDS

#### Scope of Service

Our BRIDGE for KIDS serves youth within the heart of east Charlotte, located on the Aldersgate campus, and has been providing out of school time services for 7 years. This organization is known as the only out of school time program within the Charlotte area that focuses on supporting refugee and immigrant students and families. OurBRIDGE serves K-5 youth with most of their enrollment attending three Title I schools, Merry Oaks International Academy, Windsor Park Elementary, and Winterfield Elementary. Their program is organized around the three principles of socio-emotional development, academic and English acquisition and cultural inclusivity which is reflected through their culturally relevant, experiential English as a Second Language (ESL), curriculum that highlights science, technology, engineering, arts, and mathematics (STEAM).

#### Performance

Measure	FY 2020 Year-End Actual	FY 2021 Mid-Year Actual	FY 2022 Target
Number of students to be served	n/a	n/a	100

#### Financial Information

**Funding Source(s):** Community Development Block Grant (CDBG)

FY 2021 City Funding	FY 2022 City Funding Request
n/a	\$120,000

#### Summary/Highlights of Agency Request

This is the first time that Our BRIDGE for KIDS has requested funding through the Out of School Time (OST) Program, Request For Proposal (RFP). This funding request is part of the City's OST RFP process which utilizes an Evaluation Committee comprised of Housing & Neighborhood Services (HNS) staff, and representatives within the community with expertise in child and youth development, who conducted program evaluations and staff interviews with all RFP respondents. Recommendations for funding are made based on the outcome of this evaluation and shared with Charlotte City Council for consideration.

The City's OST Program awards \$1,200 per child served, up to a maximum of \$200,000, to qualifying agencies that run a program where each youth served is required to attend five days per week, at a minimum of three hours per day on each day that Charlotte-Mecklenburg Schools is in operation with or without a summer program.

Generally, OST Funding represents approximately 1/3 of program costs for agencies. The OST Program, per CDBG guidelines, allows agencies to use City funds for various program delivery costs.





## FY2022 Out of School Time Partners Funding Request

### Agency Name: Police Activities League

#### Scope of Service

Founded in 1968, the Charlotte Mecklenburg Police Activities League (PAL) provides Out of School Time programming to youth from low-income families through educational after-school and summer camp enrichment programming, mentoring, cultural, and athletic activities. PAL's mission is to provide opportunities for the youth of our community that fosters their leadership and citizenship skills through academics and athletics. PAL programming seeks to increase academic performance, critical thinking, problem solving and creativity, healthy behaviors, service-learning opportunities and parental involvement. PAL serves youth at the Greenville Neighborhood Center on Spring Street.

#### Performance

Measure	FY 2020 Year-End Actual	FY 2021 Mid-Year Actual	FY2022 Target
Number of students to be served	n/a	n/a	60

#### Financial Information

**Funding Source(s):** Community Development Block Grant (CDBG)

FY 2021 City Funding	FY 2022 City Funding Request
n/a	\$72,000

#### Summary/Highlights of Agency Request

The Police Activities League of Charlotte Mecklenburg was previously a City OST Partner during the FY2019 funding cycle with the award amount of \$156,000. This funding request is part of the City's OST RFP process which utilizes an Evaluation Committee comprised of Housing & Neighborhood Services (HNS) staff, and representatives within the community with expertise in child and youth development, who conducted program evaluations and staff interviews with all RFP respondents. Recommendations for funding are made based on the outcome of this evaluation and shared with Charlotte City Council for consideration.

The City's OST Program awards \$1,200 per child served, up to a maximum of \$200,000, to qualifying agencies that run a program where each youth served is required to attend five days per week, at a minimum of three hours per day on each day that Charlotte-Mecklenburg Schools is in operation with or without a summer program.

Generally, OST Funding represents approximately 1/3 of program costs for agencies. The OST Program, per CDBG guidelines, allows agencies to use City funds for various program delivery costs.