

City of Charlotte

*Charlotte-Mecklenburg Government Center
600 East 4th Street
Charlotte, NC 28202*



Meeting Agenda

Wednesday, April 6, 2022

Charlotte-Mecklenburg Government Center, Room 267

City Council Budget Workshop

Mayor Vi Lyles

Mayor Pro Tem Julie Eiselt

Council Member Dimple Ajmera

Council Member Tariq Bokhari

Council Member Ed Driggs

Council Member Larken Egleston

Council Member Malcolm Graham

Council Member Reneé Johnson

Council Member Greg Phipps

Council Member Matt Newton

Council Member Victoria Watlington

Council Member Braxton Winston II

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1:00 P.M. CITY COUNCIL BUDGET WORKSHOP, CHARLOTTE-MECKLENBURG GOVERNMENT CENTER, REGULAR MEETING HOSTED FROM ROOM 267

This meeting will also be accessible via the Government Channel, the City's Facebook page, and the City's YouTube channel.

1. Workshop Overview

Staff Resource(s):

Marcus Jones, City Manager

2. Digital Transformation

Staff Resource(s):

Reenie Askew, Innovation and Technology

3. Enterprise Fund Report Outs

Staff Resource(s):

- Charlotte Water
 - Angela Charles, Charlotte Water
 - Mike Davis, Storm Water Services
- CATS
 - John Lewis, Jr., CATS
- Aviation
 - Haley Gentry, Aviation

4. Financial Partners

Staff Resource(s):

Marie Harris, Strategy and Budget

Adjournment

Attached Q&As from March 9, 2022 Budget Workshop

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Digital Transformation

APRIL 2022

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Purpose



Agenda

1. I&T Overview
2. Digital Transformation Journey
 - Foundation
 - Resident Focus
3. Enterprise Resource Planning (ERP)
 - High-Level Business Case
 - Program Timeline
4. Budget Considerations and Next Steps

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Innovation & Technology Overview

WE ARE I&T
Your Partner for Success

TECHNOLOGY & USER SUPPORT, APPS, SECURITY, TECHNICAL COMMUNICATION, ANALYTICS, MOBILITY, BUSINESS TECH SERVICES, ARCHITECTURE SERVICES, PROJECT MANAGEMENT, CONSULTING, GOVERNANCE SERVICES, PORTFOLIO SERVICES, TECHNOLOGY & USER SUPPORT

CITY of CHARLOTTE | INNOVATION & TECHNOLOGY

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Digital Transformation Journey

City of Charlotte Vision

Standardize Back Office Process & Tools
Standardize onto an enterprise system to support our business operations.

Business Technology Roadmap
Vision of our departments to improve city business and resident services.

Sustainable Telework Shift
Seamless shift into a virtual work environment due to COVID-19.

Centralize I&T and Stabilize Back Office
Foundational centralization of the I&T department team.

Accelerate Resident Services
Focus on the resident experience.

TODAY

ACR >>>

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Digital Transformation Journey: The Foundation

<p>01 Centralize I&T</p> <ul style="list-style-type: none"> • Centralized technology resources across city departments • Restructured job classifications to better support departments • Laid the foundation of an organization that can quickly respond with the "whole weight of I&T behind them" • <i>Key projects: Project Unite</i> <p>Stabilize Back Office</p> <ul style="list-style-type: none"> • Establish the foundation by creating a secure, telework environment/infrastructure • <i>Key projects: Microsoft 365 Roll-out, enhance security</i> 	<p>02 Sustainable Telework Shift</p> <ul style="list-style-type: none"> • COVID-19 demonstrated that people can quickly shift when needed • 2000-2500 employees productively teleworking in a matter of days • Presented an opportunity for the city to make large strides in its Digital Transformation • <i>Key projects: Expanded infrastructure, purchased assets, remote connectivity expansion</i>
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Digital Transformation Journey: Focus on the needs of our Residents

<p>03 Strategic Business Technology Roadmap</p>	<p>Vision of our Departments Roadmap depicts the path forward for department technology objectives to improve city business and resident services</p> <p>Funding/Budget Planning to use federal dollars where applicable to accomplish these objectives</p> <p>Resident-Facing A large portion of initiatives are directly resident-facing</p>
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ERP Digital Transformation

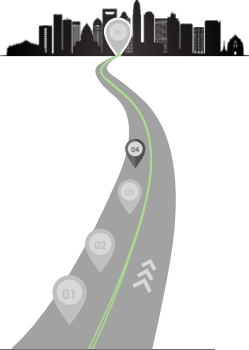
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ERP Program: Overview

04

Why now?	Scope Areas
<p>Current System Limitations End-user satisfaction is low across departments, missing functions/features, current systems being sunset</p> <p>Innovation Inflexibility Driving towards a cloud solution to keep up with rapid tech advancements</p> <p>Org Readiness Currently structured to optimize our opportunity to implement best practices across the city (shared services)</p>	<div style="margin-bottom: 10px;"> <p style="background-color: #4a7c59; color: white; border-radius: 50%; padding: 5px; display: inline-block;">A</p> Finance & Budget <i>Record to Report</i> </div> <div style="margin-bottom: 10px;"> <p style="background-color: #4a7c59; color: white; border-radius: 50%; padding: 5px; display: inline-block;">B</p> Procurement <i>Procure to Pay</i> </div> <div> <p style="background-color: #4a7c59; color: white; border-radius: 50%; padding: 5px; display: inline-block;">C</p> HR <i>Hire to Retire</i> </div>



Value

This enterprise system supports **every department** through:

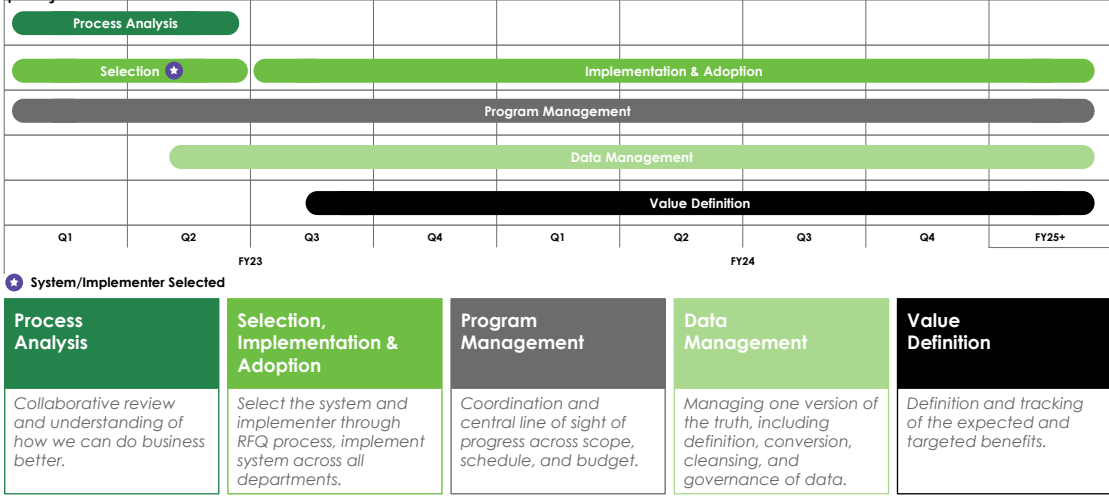
Automation	Decision Support	Security
<ul style="list-style-type: none"> Standardizes and automates processes, reducing the amount of manual, routine work. Facilitates the flow of information across business units. Integrates with core modules, eliminating system fragmentation. 	<p>Creates a holistic enterprise view support decision making by:</p> <ul style="list-style-type: none"> Centralizing information from multiple parts of the value chain to a single point. Standardizing data definition and eliminating data redundancy. 	<ul style="list-style-type: none"> Provides intrinsic controls that supports data security (e.g., access controls). Creates ability to automate/centralize critical system maintenance activity. Cloud architecture provides another layer of security by storing data redundantly.

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ERP Digital Transformation: Timeline

Approximately \$7-10M investment in FY23. Total investment projected to be \$30-45 million over the next 3 years. Enterprise Funds would be responsible for 38% of the project.



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Budget Considerations and Next Steps

- 03 The Strategic Business Technology Roadmap has been rolled-out to departments. This will be our forward-looking plan and revisited every year.
- 04 The ERP Digital Transformation team is in continued discussions and targets having a final selection by October 2022. If approved, an ERP project will take approximately 36 - 42 months.
- 04 Approximately \$7-10M investment in FY23. Additional investment projected to \$30-45* million over the next 3 years. Enterprise Funds would be responsible for 38% of the project.

* Estimates will be refined after completion of vendor selection


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Questions?

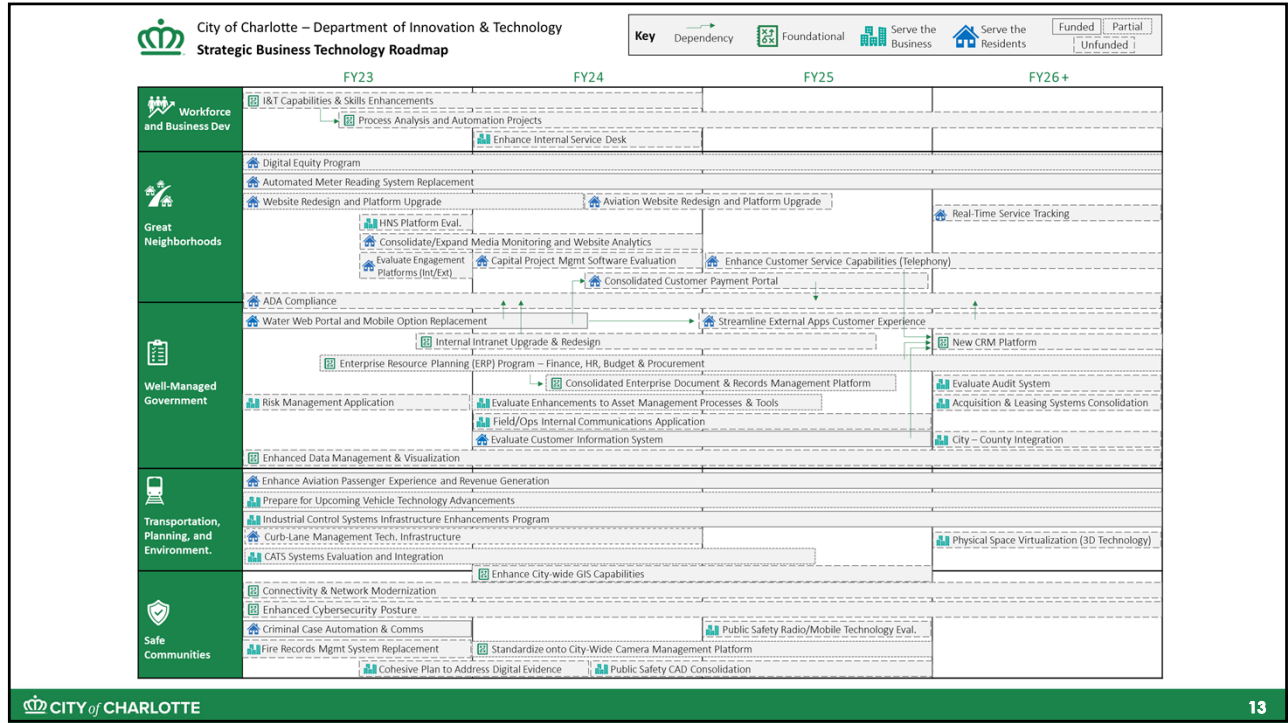
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Appendix

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FY 2023 BUDGET OUTLOOK

CITY COUNCIL BUDGET COMMITTEE

#OneWaterStrong

CHARLOTTE WATER



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What We Do

Mission:

To serve the City by improving surface waters and conveying rainwater safely through well-maintained storm drainage systems

Water Quantity

Ensure runoff drains safely to streams and protect the traveling public by reducing the risk of flooding



Surface Water Quality

Protect and improve the quality of streams and other surface waters to support sustainable, healthy communities



Equitable Service

Ensure all services are delivered equitably throughout the City for the benefit of all



CHARLOTTE WATER



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Infrastructure Investments

Completing Major Capital Projects

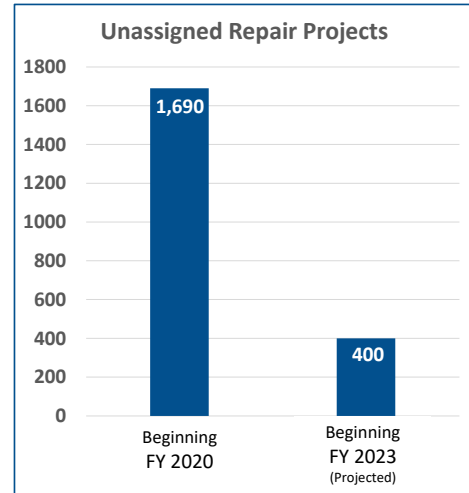
- ◁ Large scale, comprehensive projects
- ◁ Makes up 47% of CIP (\$247M, FY 2023-FY 2027)

Clearing Out the Repair Backlog

- ◁ By FY 2019, wait times had grown to 7+ years
- ◁ Refined project categorization and prioritization
- ◁ Developed plan to increase production by 83% over 5 years
- ◁ All remaining private property assistance repair projects will be under way by end of FY 2024

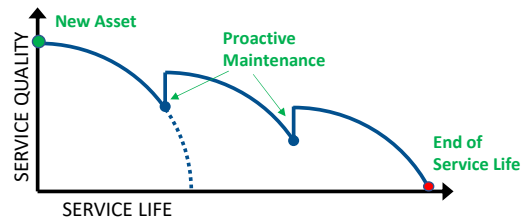
Look Ahead

- ◁ Construction material availability emerging concern



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Proactive Maintenance



- ◁ Continue development of asset management program to inform capital investment priorities
- ◁ 99% of City's drainage system inventoried (previously 55% in FY 2020)

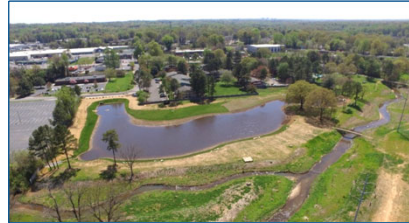
- ◁ Investments in proactive maintenance reduce total costs and extend life of drainage system
- ◁ Goal is to replace 1% of system per year; City is currently replacing approximately ½ percent

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Improving Surface Water Quality

Surface Water Quality Program

- ◁ Ensures compliance with the City's Federal Clean Water Act required stormwater permit
- ◁ Implements projects to improve waterways
- ◁ Provides services to other departments for compliance with environmental regulations



NCDEQ to Audit City's Stormwater Permit in 2022

- ◁ Permit compliance includes:
 - ✔ Education and outreach
 - ✔ Pollution control & development regulations
 - ✔ Enforcement

Addressing Growth Pressure

◁ Effective Land Development Regulation Critical to STW Success

- ✔ Ensure new drainage infrastructure is effective and can be maintained
- ✔ Avoid damage to existing public drainage infrastructure
- ✔ Minimize surface water quality impacts



◁ Goal is to sustain level of service for review activities while development activity continues to increase

◁ Staff continues to work with Planning and the development industry on the UDO to address gaps in development regulations

Financial Planning

- < Revenue primarily from Storm Water Services fee on utility bill
- < Properties pay the same rate per square foot of impervious area
- < STW maintains a 10-year financial plan to support strategic priorities
- < Modeling effort is collaborative with the Finance Department and Department of Strategy & Budget and reviewed by a financial consultant
- < A 1% increase corresponds to a 13 cents or less per month increase for 90% of single-family homeowners

Fiscal Year	FY2020 Model Projected	Actuals
2020	0%	0%
2021	3.6%	0%
2022	3.6%	3.2%
2023	3.6%	TBD*
2024	3.6%	
2025	3.6%	

*** FY 2023 fee recommendation will be finalized as part of continuing budget process and included in City Manager's recommended budget**

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Additional Resource Slide

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Fee Structure (FY2022 Values)



	Customer Base	Median	City	County	Bill Process	Total Fee
Detached Single Family	Tier I <2000 sq ft 39,663 accounts (20%) 65.1M SF of impervious (11%)	1,673	\$6.04	\$0.92	\$1.10	\$8.06
	Tier II 2000 to 2999 sq ft 78,493 accounts (41%) 194.2M SF of impervious (32%)	2,467	\$8.91	\$1.40	\$1.10	\$11.41
	Tier III 3000 to 4999 sq ft 56,067 accounts (29%) 210.9M SF of impervious (35%)	3,648	\$13.17	\$2.13	\$1.10	\$16.40
	Tier IV 5000 sq ft and up 19,887 accounts (10%) 137.5M SF of impervious (22%)	6,034	\$21.78	\$3.96	\$1.10	\$26.84
	Multifamily & Commercial 23,800 accounts 1.13B SF of impervious	NA	\$157.23	\$24.57	\$1.10	\$182.90

per impervious acre 5

Fee appears on monthly utility bill

Fees for all property types are based on the same cost per square foot of impervious.
(Currently \$0.003609936 per square foot)

Single Family rates are grouped into four tiers using a median value.


Multifamily and Commercial are charged to the exact square foot.

Bill combines City and County rates into a total monthly fee



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Charlotte Water #OneWaterStrong

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Mission & Vision

INFRASTRUCTURE FOR THE FUTURE
Support growth, mobility, accessibility and reliability

SUSTAINABILITY
Regulatory compliance to protect residents and waterways

EQUITY & INCLUSION
Provide services equitably for the benefit of all

Mission
Charlotte Water provides reliable, high-quality services to our community through valued employees, financial stability, and environmental stewardship

Vision
To be a leading water utility, recognized for excellence and dedicated to our people, community, region, and environment



CHARLOTTE WATER 

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Charlotte Water Performance in Pandemic

**Managed through staffing shortages
Every Charlotte Water WWTP qualified for a Peak Performance Award (NACWA)**

- McAlpine Creek 14 years of perfect permit compliance

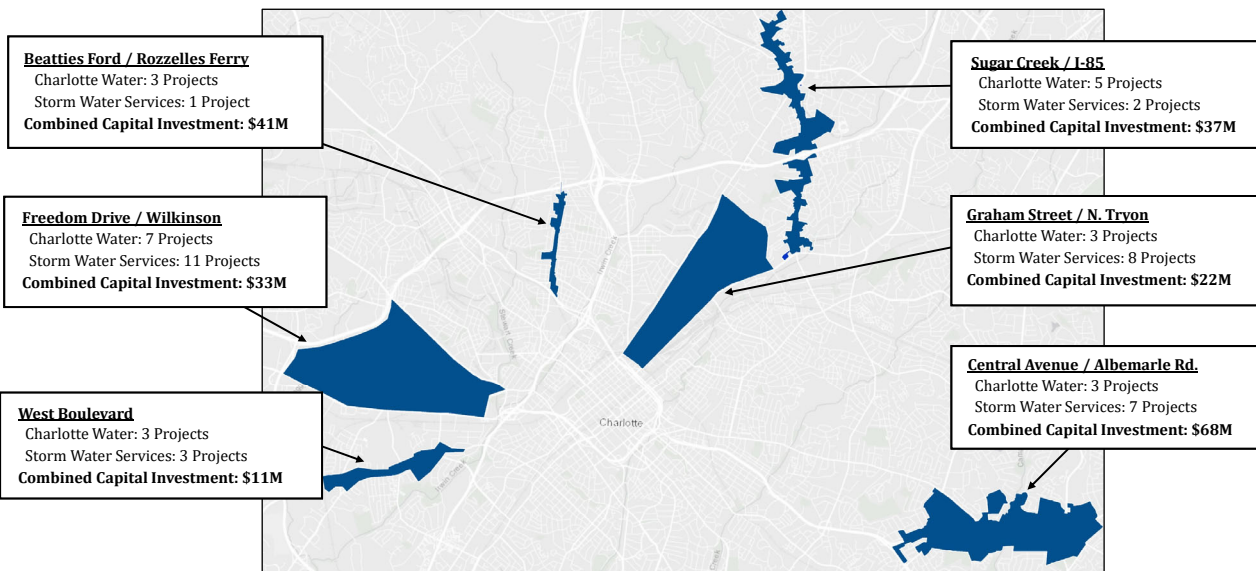
Every Charlotte Water WTP produced water with perfect compliance

- Distributed 39.6 Billion Gallons Completed
- 175,000 water quality tests
- 3,045 repairs
- Several large-scale projects at plants and in pipe system



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Over \$200M Invested in Corridors of Opportunity



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Proposed FY23 Budget

FY23 Charlotte Water budget = ~\$534 million

Budget Drivers

- Increases in regulatory requirements
- \$16 million increase in PAYGO contributions
- Funding for community initiatives
- Increases in fuel, power, and chemical costs

Enhancement Focus Areas

- Well-Managed Government
- Economic Development
- Safe, Healthy, and Inclusive Community
- Mobility, Accessibility, and Connectivity



37%
OPERATING
\$194.9 Million

63%
CAPITAL
\$339.0 Million

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Proposed Capital Investment Program

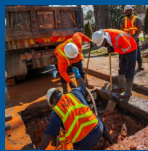
Five-year CIP = \$2.65 billion

54% \$1.4 Billion



CAPACITY FOR GROWTH

26% \$684.9 Million



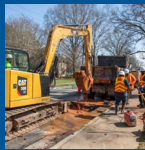
REHABILITATION & REPLACEMENT

10% \$260.3 Million



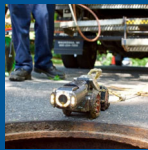
REGULATORY REQUIREMENTS

7% \$183.8 Million



COMMITMENT TO PUBLIC PROJECTS

3% \$84.3 Million



UTILITY SUPPORT

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Charlotte Water's Regional Economic Impact

Job Created

- **81 JOBS** created for every **\$1 MILLION** spent
- **5,000 JOBS** created from **\$500 MILLION** in O&M and capital spending in FY 2021
- **7,000 JOBS** supported over the next **5 YEARS**
- **246,000 JOBS** created in water-dependent industries in six-county region in 2021

Economic Output

- **\$17.7 MILLION** in growth for every **\$1 MILLION** spent
- **\$6.3 BILLION** generated by Charlotte Water spending
- **\$30.9 BILLION** contributed to Mecklenburg County by water-dependent industries
- **\$46.5 BILLION** contributed to six-county region by water-dependent industries

Financial Planning

10-Year Financial Model
 Maintain triple AAA ratings

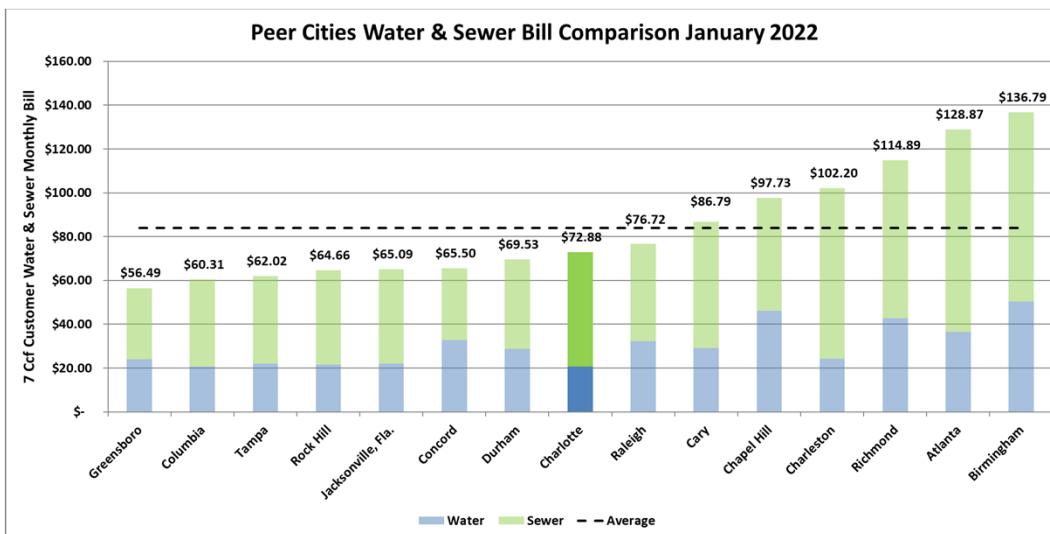
- Cash reserves of ≥ 250 days cash-on-hand
- Revenue Bond Coverage Ratio of ≥ 2.0x

Fiscal Year	FY2020 Financial Model Projected	Adopted Rate Increases	FY2023 Financial Model Projects
2021	3.38%	1.86%	
2022	3.43%	3.42%	
2023	3.57%		3.50% - 3.75%
2024	3.61%		
2025	3.48%		
2026	3.52%		

** 1 gallon of water less than 3 cents*

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Rate Comparison



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QUESTIONS?



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CHARLOTTE WATER

CHARLOTTE WATER

MISSION

Charlotte Water provides reliable, high-quality services to our community through valued employees, financial stability, and environmental stewardship.

VISION

To be a leading water utility, recognized for excellence and dedicated to our people, community, region, and environment



INFRASTRUCTURE FOR THE FUTURE

Support growth, mobility, accessibility and reliability



SUSTAINABILITY

Regulatory compliance to protect residents and waterways



EQUITY & INCLUSION

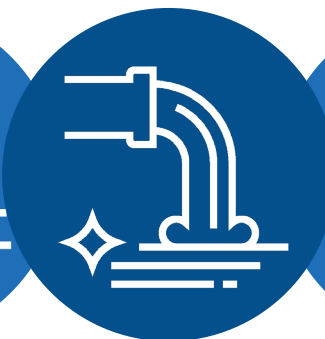
Provide services equitably for the benefit of all

FISCAL YEAR 2021 STATISTICS



109.7

million gallons of water pumped on average each day



87.2

million gallons of wastewater treated on average each day



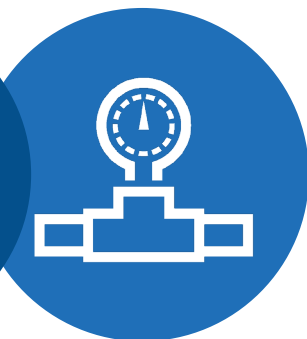
8,957

miles of water and wastewater pipes maintained



572

water main leaks repaired



313,177

active and inactive meters

AAA Rated by Moody's Investors Service, Fitch, and Standard & Poor's Financial Services

A gallon of water costs less than \$0.03

\$395.4 Million invested in capital project improvements

PROPOSED FY23 BUDGET

TOTAL FY22 BUDGET:

~\$534 million

31 TOTAL ENHANCEMENTS:

26 RELIABLE INFRASTRUCTURE

3 HIGH-PERFORMING WORKFORCE

2 ENVIRONMENTAL STEWARDSHIP



37% Operating \$194,977,849

63% Capital \$339,004,076

CAPITAL INVESTMENT PROGRAM \$2.65 BILLION



54% CAPACITY FOR GROWTH \$1,434,324,435



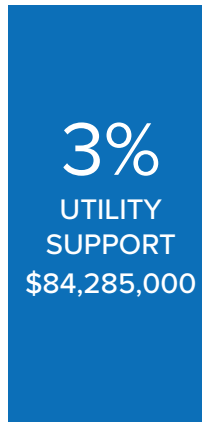
26% REHABILITATION & REPLACEMENT \$684,850,000



10% REGULATORY REQUIREMENTS \$260,300,000




7% COMMITMENT TO PUBLIC PROJECTS \$183,800,000



3% UTILITY SUPPORT \$84,285,000





Charlotte Area Transit System
 FY2023 Preliminary Operating & Debt
 Service Budgets
 FY2023-27 Capital Investment Plan

Council Budget Workshop
 April 6, 2022

John M. Lewis, Jr. CATS CEO
 Charlotte Area Transit System

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FY2023 CATS' HIGHLIGHTS

Where we are Now!

- ✓ Impact - COVID-19 Pandemic
- ✓ Ridership Declines
- ✓ Staffing Shortages
- ✓ Service Based on Demand

Where we are Going!

- ✓ BEB – Battery Electric Buses
- ✓ Transformational Mobility Network (TMN)
 - ✓ Silver Line
 - 2030 Rail System Plan
 - ✓ Envision My Ride

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FY2023 CATS' HIGHLIGHTS

Major Concerns!

- ✓ COVID-19 Impact
 - Re-capture Ridership
 - Staffing Retention and Recruitment
 - Service Based on Demand
- ✓ Continue to Operate Safely
 - Additional Security Enhancements
- ✓ Manage & Maintain our Assets








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CATS TRAX

- ✓ CATS Performance Outcomes
- ✓ Assigns Importance Scoring
- ✓ Industry Metrics


CATS TRAX

What is CATS Trax?
 Quarterly performance scorecard that provides employees, customers, elected officials, and the general public with a snapshot of how we're doing at a high level. Metrics are aligned with CATS goals and customer satisfaction index.

4 Management Principles

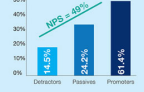


Net Promoter Score (NPS)
 Measures the willingness of customers to recommend a company's product or service.




Net Promoter score

CATS Overall NPS
 Transit industry average 31%



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FY2023 PRELIMINARY BUDGET SUMMARY

CATS TRAX FY22 Aggregate Scorecard								
Strategy	Metric	Performance Goal	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Goal Points	Q2 Earned Points
Customer Satisfaction	Overall Customer Satisfaction	90%	83%	-			9.0	6.0
	Overall Net Promoter Score	58%	57%	-			9.0	6.0
	Overall On-Time Performance	89%	89%	80%			6.0	5.4
	Customers with Access to 15-minute or Better Service	45%	20%	19%			2.0	0.9
	Overall Ridership**	4,946,242	2,460,386	5,044,419			2.0	2.1
	Overall Ridership**	100%	56%	51%			2.0	1.8
Employee Success	Confidence to Return	74%	67%	67%			3.0	1.8
	Employee Engagement	80%	60%	64%			6.0	4.8
	eNPS	9	-10	-39.8			6.0	3.8
	Employee Satisfaction	85%	55%	56%			3.0	2.0
	Customer Satisfaction with CATS Employees	86%	88%	-			4.0	2.7
	Customer Satisfaction with Call Center Interactions	87%	82%	-			4.0	2.7
	Career Pathways/Succession Planning*	Establish baseline	-	-			1.0	0.7
	Performance Reviews*	Establish baseline	-	-			1.0	0.7
Community Impact	Economic Impact**	1.06	1.06	1.09			5.0	4.7
	Community Perception of Community Value	85%	80%	80%			10.0	9.4
	Investments in Corridors of Opportunity*	Establish baseline	-	13%			4.0	2.7
	Service Equity*	Establish baseline	-	1,041			4.0	2.7
	Public Engagement Effectiveness*	Establish baseline	-	-			2.0	1.3
Financial Stability	Taxpayer Subsidy Percentage, (CATS Policy <80%)**	<80%	87.2%	90.0%			4.0	3.5
	Administrative Overhead (CATS Policy <15%)**	<15%	15.0%	12.0%			2.0	2.4
	Overall Operating Cost/Revenue Hour**	\$174.62	\$158.37	\$180.92			4.0	3.5
	Overall Customers/Revenue Hour	18.6	10.9	11.5			3.0	2.2
	Directly Generated Revenue**	4.0%	3.40%	2.0%			4.0	3.4
Overall Performance Score							97.0	75.2

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FY2023 PRELIMINARY BUDGET SUMMARY

BUDGET SUMMARY					
		FY2023		Variance	
		Adopted Budget <i>(millions)</i>	Preliminary Budget <i>(millions)</i>	(millions)	(%)
Total Operating Revenue		\$ 185.8	\$ 205.6	\$ 19.8	10.7%
Total Operating Expenditures		\$ 185.8	\$ 205.6	\$ 19.8	10.7%
Debt Service Budget		\$ 62.1	\$ 18.1	\$ (44.0)	-70.9%
Capital Budget*		\$ 245.4	\$ 45.7	\$ (199.7)	-81.4%

No Fare Increase Included

*Note: FY2023 Preliminary Capital Budget excludes carry over amounts

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FY2023 PRELIMINARY BUDGET SUMMARY

Operating Revenues

	FY2022 Adopted Budget (Millions)	FY2023 Preliminary Budget (Millions)	Variance (Millions)	Variance (%)
Service Passenger Fares	\$ 19.1	\$ 13.4	\$ (5.7)	-30.2%
All Access Pass	2.9	2.9	-	0.0%
Service Reimb & Funding Partners	0.4	0.4	0.1	3.2%
Service Income	8.2	4.0	(4.2)	-50.9%
Sales Tax Revenue	88.3	100.8	12.5	14.3%
Maintenance of Effort	24.0	24.7	0.7	3.0%
Operating Assistance	25.7	13.2	(12.5)	-48.5%
Non Operating Revenue	17.3	46.1	28.9	166.8%
TOTAL OPERATING REVENUES	\$ 185.8	205.6	\$ 19.8	10.6%

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FY2023 PRELIMINARY BUDGET SUMMARY

COVID-19 Funding Use

	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	FY2026	Total
	Actual	Actual	Adopted Budget	Preliminary Budget	Plan	Plan	Plan	
Operating	\$ 0.2	\$ 20.2	\$ 20.9	\$ 34.1	\$ 37.5	\$ 24.5	\$ 10.8	\$ 148.1
Capital	2.6	-	20.0	20.0	-	-	-	42.6
Total	\$ 2.8	\$ 20.2	\$ 40.9	\$ 54.1	\$ 37.5	\$ 24.5	\$ 10.8	\$ 190.7

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 **FY2023-27 PRELIMINARY CAPITAL PROGRAM**

\$143.0 million Funds 5-Year Capital Program

Key Capital Expenses:

- ✓ **State of Good Repair \$102.5 million**
 - Replace **fixed route buses; STS Buses; Vanpool Vans**
 - **Solar Panels, Electric Vehicle Chargers**, Bus Shelter Improvements and Facility upgrades
- ✓ **Transit Safety & Security \$4.5 million**
 - **Camera replacement**, Guard Shacks and **Access Control System** replacement
- ✓ **Transit Long Range Capital Improvement \$ 20.6 million**
 - **Hambright Park & Ride**
 - Land Swaps
 - **Temporary Facility for Uptown Transit Center**, if needed
- ✓ **Transit Non-Revenue Vehicles \$3.3 million**
 - **Non-Revenue Vehicle** replacements
- ✓ **Transit New Equipment \$12.1 million**
 - **Bus and Rail Equipment**, Technology Upgrades
 - **New City ERP System**



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AVIATION FY 2023 BUDGET

April 6, 2022
Council Budget Workshop

CITY OF CHARLOTTE DEPARTMENT

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CLT FAST FACTS		
1 ABOUT CLT AIRPORT	2 NUMBERS & RANKINGS	3 ECONOMIC IMPACT
<p>TERMINAL OPENED MAY 2, 1982</p> <p>114 GATES </p> <p>1,300+* DAILY AIRCRAFT MOVEMENTS</p> <p>100,000+* DAILY PASSENGERS</p> <p>26,500+ PARKING SPACES</p> <p>6,000 ACRES OF LAND</p> <p>1.8M Sq. Ft. TERMINAL WITH 5 CONCOURSES</p> <p>FOUR TOTAL RUNWAYS</p> <p>100+ CONCESSIONS</p> <p><small>*Prior to COVID-19, CLT recorded yearly 68.2 million passengers, 578,263 aircraft movements and 183,900 tons of cargo. *On a daily basis, CLT served 137,500 passengers and 1,600 aircraft movements.</small></p>	<p>2021 NUMBERS</p> <p>43,302,230* PASSENGERS </p> <p>519,895* AIRCRAFT MOVEMENTS </p> <p>168,566* TONS OF CARGO </p> <p>2020 ACI RANKINGS*</p> <p>6th IN AIRCRAFT MOVEMENTS</p> <p>6th IN TOTAL PASSENGERS</p> <p>33rd IN TOTAL CARGO</p> <p><small>*Nationally CLT is financially self-sustaining. No general fund revenues are appropriated to the facilities or operation.</small></p>	<p>\$24.6B ANNUAL ECONOMIC IMPACT</p> <p>4% OF STATE GROSS PRODUCT </p> <p>\$1.3B STATE & LOCAL TAXES </p> <p><small>Source: NC Department of Transportation Division of Aviation</small></p> <p>AIRLINES</p> <p>188 NONSTOP DESTINATIONS </p> <p>36 INTERNATIONAL DESTINATIONS </p> <p>THREE US TERRITORIES</p> <p>SEVEN DOMESTIC AIRLINES</p> <p>THREE FOREIGN FLAG AIRLINES</p> <p> @CLTAirport FEBRUARY 2022</p>
	cltairport.com	

2



CLT Strategic Principles

Safety & Security

Risk Mitigation

Investing in security operations and technological enhancements

Strategic Growth

Master Planned

Demand-driven terminal and airfield expansion

Strong Partnerships

Cost Competitive
Engage Community

Providing exceptional value to business partners and the community

Asset Preservation

Proactively Maintain
Reliable Operations 24/7/365

Preventative maintenance of airport facilities

Value Employees

Recognize Performance
Employer of Choice
Diversity, Equity, and Inclusion

Educate, train, and empower our most important asset

Customer Focus

Passenger Satisfaction &
The CLT Experience

Investments in passenger experience and technology applications



3

Operating Budget Summary

Budget	FY 2021	FY 2022	FY 2023	Change
	Actual	Revised	Proposed	FY 2022 to FY 2023
Revenues	196,155,994	254,243,809	323,979,882	69,736,073
Personnel	60,698,576	66,361,826	73,261,760	6,899,934
Operating	75,407,360	108,286,015	128,347,883	20,061,868
Capital	685,867	699,000	752,000	53,000
City Services	24,421,344	24,323,754	24,934,268	610,514
Department Chargeouts	-	(4,575,173)	(4,623,673)	(48,500)
Total Expenditures	161,213,147	195,095,422	222,672,238	27,576,816
				FTE Count Change
Total FTEs	708	714	759	45

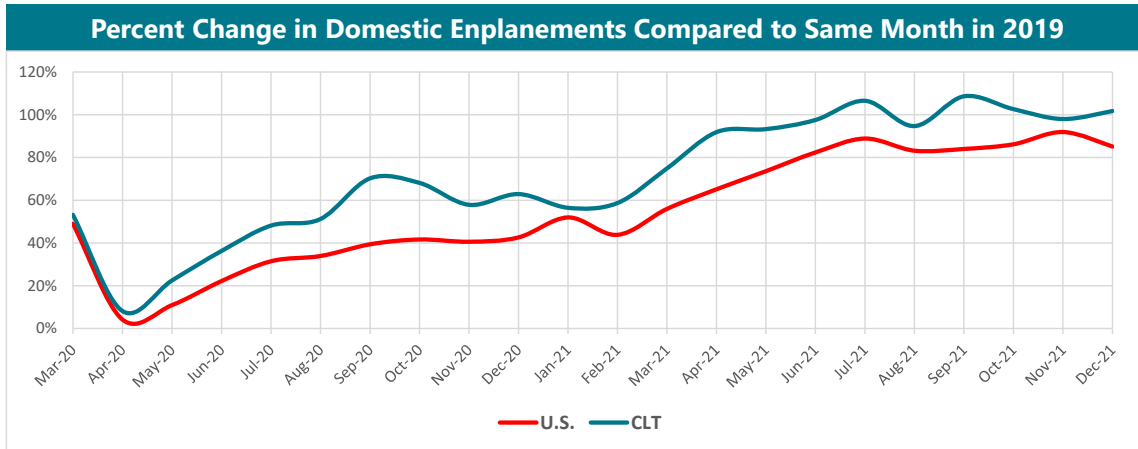
- Significant revenue growth of 27.4%
- Overall, 16.1% Budget increase
- 10.4% increase to Personnel Services, including 45 new positions
- 18.5% increase to Operating Expenses
- 2.5% increase to City Services



4

CLT Domestic Enplanement Recovery Versus Nation

CLT has consistently exceeded national domestic passenger levels throughout the pandemic



Source: CLT—CLT records. U.S.—U.S. Department of Transportation.



5

FY 2023 Budget by Strategic Principle

Safety & Security

\$5.9M for Public Safety Functions (Police, Fire, Medic), Curbside traffic management, and reinstating funding to airport IROPS budget for unplanned events

Strategic Growth

\$3.1M for continued marketing efforts of online pre-booking parking system and non-aeronautical development

Strong Partnerships

\$8.4M for management agreement at the FBO to account for higher fuel prices and increased activity.

Asset Preservation

\$4.2M to maintain and enhance facility and technology infrastructure

Value Employees

\$2.3M for additional employee training, workforce development, recruitment and retention, and continued education

Customer Focus

\$3.6M to return to pre-pandemic levels of service for customer facing initiatives

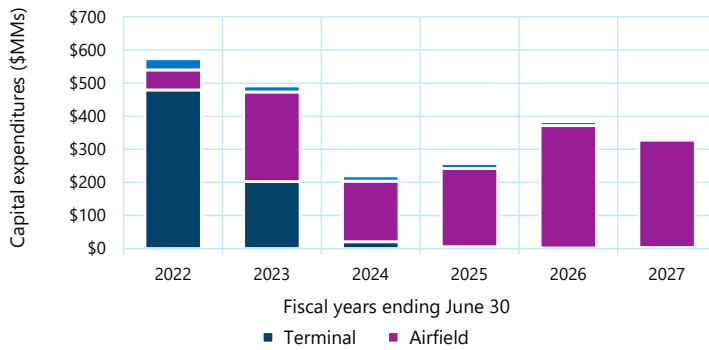


6

CIP Shifting to Airfield Focus Following Much-Needed Terminal Capacity Projects

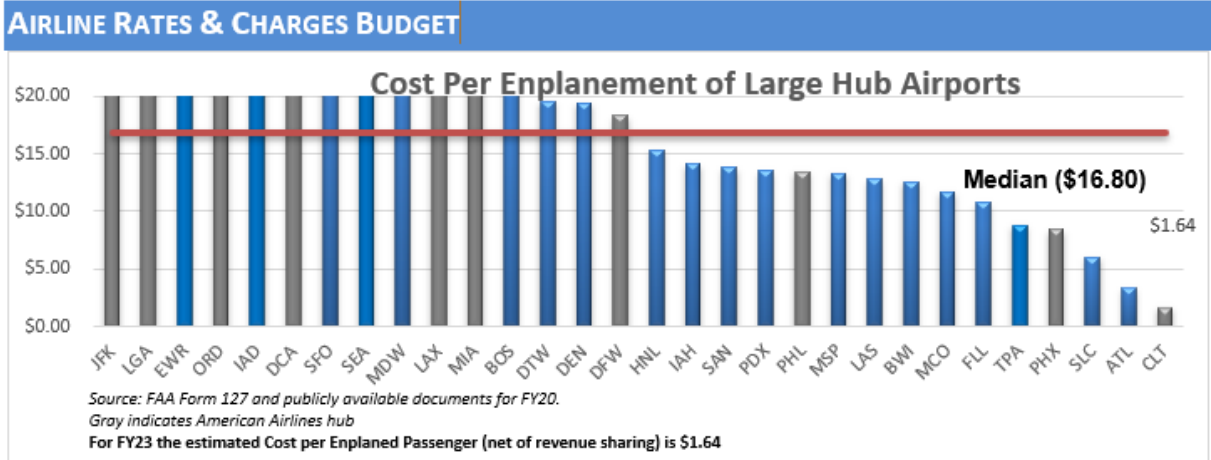
- **\$2.25 billion** program for FY 2022-FY 2027

Forecast Capital Expenditures by Cost Center (\$MMs)



7

Cost per Enplaned Passenger



8

Aviation FY 2023 Budget Overview

CLT VISION AND MISSION

Vision

We will serve as an economic engine of the Carolinas, facilitating the movement of people and goods, creating jobs and enterprise, and sustaining a higher quality of life.

Mission

We will be the preferred airport and airline hub by providing the highest quality product for the lowest possible cost.

STRATEGIC PRINCIPLES

Safety & Security

Risk Mitigation

Investing in security operations and technological enhancements

Asset Preservation

Proactively Maintain
Reliable Operations 24/7/365

Preventative maintenance of airport facilities

Strategic Growth

Master Planned

Demand-driven terminal and airfield expansion

Value Employees

Recognize Performance
Employer of Choice

Educate, train, and empower our most important asset

Strong Partnerships

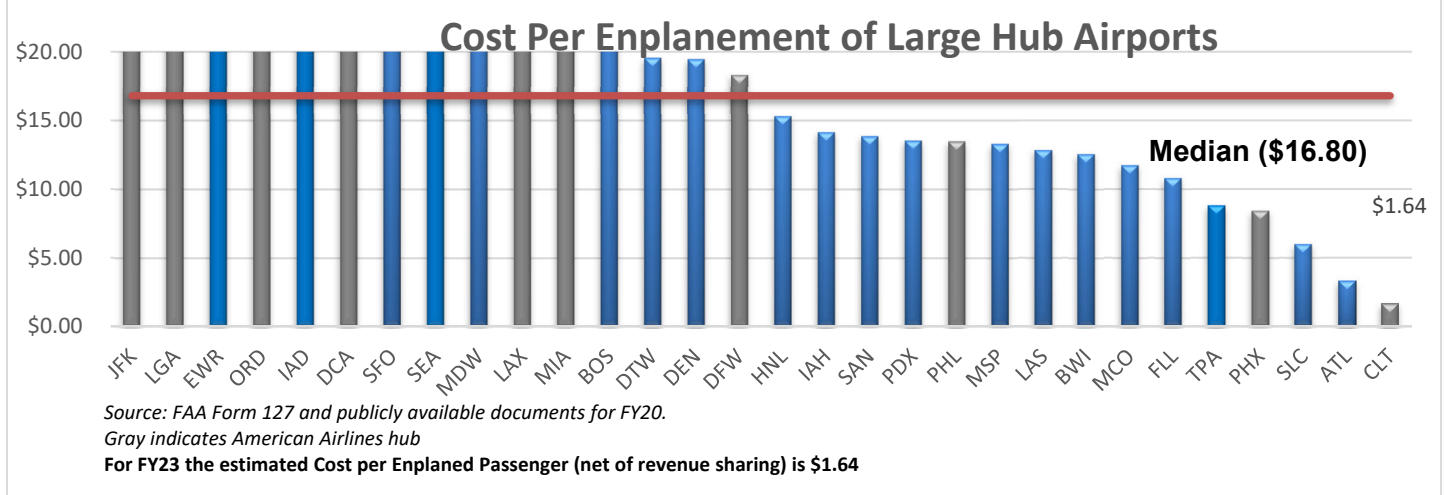
Cost Competitive
Engage Community
Providing exceptional value to business partners and the community

Customer Focus

Passenger Satisfaction &
The CLT Experience

Investments in passenger experience and technology applications

AIRLINE RATES & CHARGES BUDGET



MANAGEMENT'S FINANCIAL TARGETS & ACTUAL RESULTS

Metric	FY 2021 Target	FY 2021 Actual
Debt Service Coverage – Bond Ordinance (PFC Offset Method):	≥ 2.00x	5.9x
Debt Service Coverage – PFCs Classified as Revenues and excluding rolling coverage:	≥ 1.50x	2.31x
Airport Revenue Bond Debt Per Enplanement	≤ \$60	\$57.98
Liquidity – Days Cash on Hand	≥ 800	1,341
Net Airline Cost Per Enplaned Passenger	-	\$1.77

*PFC = Passenger Facility Charge

BUDGET DRIVERS

Safety and Security – \$5.9M increase – 15.0 FTEs

The FY 2023 budget provides additional Funding for Public Safety Functions (Police, Fire, and Medic), curbside traffic management, and reinstating IROPS funding. New positions to support the 24/7 airport operation and additional security functions.

Strong Partnerships – \$8.4M increase – 1.0 FTE

The main expense under this category is our contract agreement for FBO management. Fuel costs have risen rapidly in recent months and the airport purchases and sells fuel to the general aviation community. This funding allows for continuous operations at the FBO. One new position to support non-aeronautical economic development.

Customer Focus – \$3.6M increase – 8.0 FTEs

As public air travel demand resume funding is needed to reinstate customer facing contracts such as housekeeping, terminal customer assistance, and landside customer service staffing contracts. Additional positions to in support of parking customer service initiatives and terminal operations.

Strategic Growth – \$3.1M increase – 9.0 FTEs

CLT is continuing implementation of an Online Pre-Booking parking system. Additional funding to support marketing efforts and offer new and innovative products to customers, as well as increase non-aeronautical revenue. Positions in Strategic Communications, Business Analytics, Administration, Finance, and Technology to further support these efforts and the Aviation Department.

Asset Preservation – \$4.2M increase – 9.0 FTEs

It is crucial to maintain our physical and technological infrastructure for the airport. Increases in this section provide funding and positions for our technology, building, airfield, and fleet maintenance activities as well as increased budget for higher fuel prices.

Value Employees – \$2.3M increase – 3.0 FTEs

The airport remains committed to providing robust employee training, workforce development, and continued education for existing employees. We also are investing in our recruitment and retention programs to maintain a strong workforce. Positions in this section will bring some contracted HR staff in-house and result in overall savings.

COMMUNITY INVESTMENT PLAN TIMELINE

Opening Soon

Underway

Beginning Soon



BUDGET AND STAFFING HISTORY

Budget	FY 2021	FY 2022	FY 2023	Change
	Actual	Revised	Proposed	FY 2022 to FY 2023
Revenues	196,155,994	254,243,809	323,979,882	69,736,073
Personnel	60,698,576	66,361,826	73,261,760	6,899,934
Operating	75,407,360	108,286,015	128,347,883	20,061,868
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Department Chargeouts	-	(4,575,173)	(4,623,673)	(48,500)
Total Expenditures	161,213,147	195,095,422	222,672,238	27,576,816
				FTE Count Change
Total FTEs	708	714	759	45



FY 2023 Financial Partners

Council Budget Workshop
April 6, 2022

1

FINANCIAL PARTNERS SUMMARY

Financial Partners are contracted by the City of Charlotte to provide specific services which support key initiatives to advance Council priorities and contribute to community enrichment. The city funds the partnerships through:

**General Fund
and PAYGO
Discretionary**

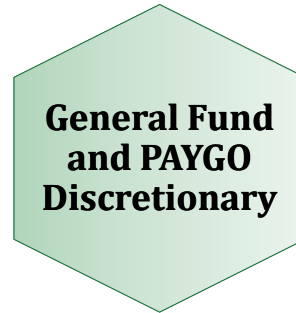
**Dedicated
Revenue
Sources**

**Housing
Financial
Partners**

2

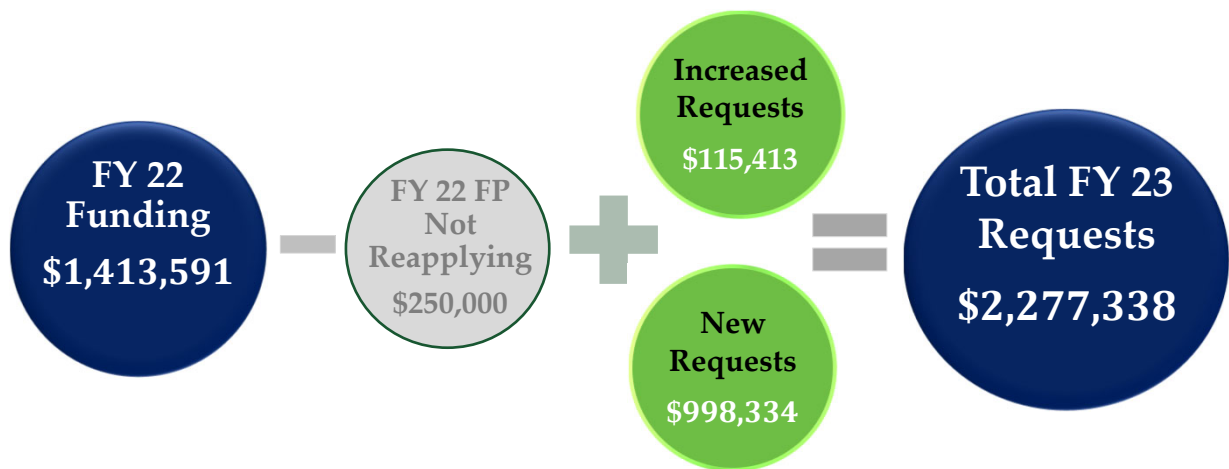
Financial Partners

General Fund and PAYGO: Discretionary



3

DISCRETIONARY FY 2022 FUNDING AND FY 2023 REQUESTS



4

CURRENT FY 2022 PARTNER AND FY 2023 REQUESTS

Agency	FY 2022 Funding Amount	FY 2023 Funding Request	Increase Requested
Alliance Center for Education	\$90,000	\$130,000	\$40,000
Bengali Women's Forum Corp	\$10,000	\$10,000	\$0
Charlotte Regional Business Alliance	\$166,553	\$167,322	\$769
Community Building Initiative	\$50,000	\$75,000	\$25,000
Greater Enrichment Program	\$200,000	\$200,000	\$0
My Brother's Keeper Charlotte Mecklenburg	\$50,000	\$90,000	\$40,000
National Institute of Minority Economic Development – The Women's Business Center of Charlotte	\$50,000	\$50,000	\$0
Safe Alliance	\$397,038	\$406,682	\$9,644
Trees Charlotte	\$150,000	\$150,000	\$0
Total Increases Requested	\$1,163,591	\$1,279,004	\$115,413

5

NEW PARTNER FY 2023 GENERAL FUND REQUESTS

New Agency Requests	FY 2023 Funding Request
Achieving Success on Purpose	\$69,301
Charlotte Center for Legal Advocacy	\$250,000
Mental Health America of Central Carolinas	\$50,000
Sword of Spirit Outreach	\$463,500
Time Out to Care	\$165,533
Total New Requests	\$998,334

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Financial Partners

Dedicated Revenue Sources



**Dedicated
Revenue
Sources**

7

DEDICATED REVENUE SOURCES FY 2022 FUNDING AND FY 2023 REQUESTS

Financial Partners with Dedicated Revenue Sources receive allocations from sources such as Municipal Service District Tax, Occupancy Tax, and Prepared Food & Beverage Tax.

Agency	FY 2022 Funding Amount	FY 2023 Funding Request	Funding Source
Charlotte Center City Partners	\$6,232,801	\$6,511,389	Municipal Service District Tax
Charlotte Regional Visitors Authority	\$18,072,813	\$18,614,997	Occupancy/Prepared Food & Beverage Tax
Charlotte Regional Visitors Authority- FILM	\$150,000	\$150,000	Occupancy Tax
University City Partners	\$1,162,593	\$1,197,480	Municipal Service District Tax

8

Financial Partners

Federal Grant Funds and Housing



9

HOUSING FINANCIAL PARTNERS FY 2022 FUNDING & FY 2023 REQUESTS

Housing Financial Partners are programmed primarily with Federal grants, such as CDBG, HOME, and HOPWA, with supplemental funding from PAYGO. These partners assist in providing housing resources such as construction or rehabilitation of units, financial support such as short-term assistance for rent or utilities and other services such as homebuyer counseling.

Agency	FY 2022 Funding Amount	FY 2023 Funding Request	Funding Source
Carolinas Care Partnership	\$2,938,627	\$3,085,558	HOPWA
Crisis Assistance Ministry	\$425,000	\$550,000	PAYGO – Innovative Housing
DreamKey (formerly Charlotte Mecklenburg Housing Partnership)	\$1,921,000	\$2,241,000	CDBG, HOME, and PAYGO – Innovative Housing
Local Initiative Support Corporation (LISC)	\$200,000	\$200,000	PAYGO – Innovative Housing

10

QUESTIONS & ANSWERS

Feedback
&
Follow up Information Requests

FY 2023 FINANCIAL PARTNERS APPLICATIONS

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

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Table of Contents

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

¹ Denotes federal funding

² Denotes PAYGO funding

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

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GENERAL FUND

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FY 2023 Financial Partner Agency Summary
 Agency Name: **Achieving Success On Purpose, Inc.**
(New Funding Request)

Mission Statement

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

Agency established

August 28, 2012

Total years financial partner with City of Charlotte

First time applicant

Population served

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum								
<table border="1"> <tr> <th colspan="2">Key</th> </tr> <tr> <td>Submitted</td> <td>✓</td> </tr> <tr> <td>Incomplete</td> <td>⚠</td> </tr> <tr> <td>Not submitted</td> <td>✗</td> </tr> </table>		Key		Submitted	✓	Incomplete	⚠	Not submitted	✗	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓
Key																			
Submitted	✓																		
Incomplete	⚠																		
Not submitted	✗																		
Achieving Success on Purpose		✓	✓	✓	✓	✗	✓	✓	✓	✓	✓								

Application notes:

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

Organization Funding Support

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

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

Describe the activities that will be supported through requested city funding

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

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

Overall Agency Budget

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

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

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

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

Overall Program Budget

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

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

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

Current Board of Directors

Kareem Puranda, Board President

Lori Brown, Treasurer

Trevor Boone, Board Member

Michael Sherman, Board Member

Nalo Coban, Executive Director

Kim Hines, Secretary

Steve Durant, Board Member

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FY 2023 Financial Partner Agency Summary

Agency Name: **Alliance Center for Education**

(Current Financial Partner)

Mission Statement

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

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

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

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

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

Agency established

January 01, 1940

Total years financial partner with City of Charlotte

4 years

Population served

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

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

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Alliance Center for Education		✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A

Organization Funding Support

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

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

Describe the activities that will be supported through requested city funding

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

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

Additional Funding utilization:

Payroll - \$39,700

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

Travel and Training - \$300

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

Overall Agency Budget

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

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

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

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

Overall Program Budget

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

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

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

Performance Objectives Report

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

Current Board of Directors

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

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FY 2023 Financial Partner Agency Summary

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

(Current Financial Partner)

Mission Statement

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

Narrative –

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

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

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

Agency Established

November 09, 2021

Total years financial partner with City of Charlotte

1 year

Population served

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

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

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Bengali Women's Forum Corp.		✓	✓	✓	✓	N/A	✓	✓	✓	✓	✓

Organization Funding Support

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

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

Describe the activities that will be supported through requested city funding

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

We have also noticed recently that

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

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

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

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

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

1. Conducting Training using social channels on “Harassment Intervention Training”

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

2. Building social consciousness by highlighting matters through various BWF’s established channels

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

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

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

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

Overall Agency and Program Budget

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

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

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

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

Performance Objectives Report

Corporate Scorecard Objective: - Social & Economic Empowerment

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Develop a framework for Social & Economic empowerment	Enhancement and providing a platform for all	Program & Platform is open for all in the community Frequencies of program rollouts and participants The program will target participation through freememberships	NA	- 1 session organized - 80+ participants trained - Free education offered to adults and children
	Direct outcome: eventually, the participants get the job according to their capabilities and continuation with the program	Number of participants get the job	NA	N/A
	Indirect outcome: individual performance improvements in one or all of the identified parameters such as Psychological, Social, Human capabilities, and Individual assets	Participants to appraise the effectiveness of these events on a larger scale through training feedback	NA	- 80+ participants - 50 feedbacks documented with highest rating to denote that this training was highly effective and brings value to the participants in the communities

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

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

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

Current Board of Directors

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President & Chair of the Board

Mehreen Muner,
Board Director

Animita Chowdhury Saha,
Board Director

Saswati Collam,
Board Director

Karli Bose,
Board Director

Dhanonjoy Chowdhury Saha,
Advisor

Ritu Mukherjee,
Advisor

Lopamudra Das Roy,
Advisor

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

Mission Statement

Our mission is to pursue justice for those in need.

Agency established

September 09, 1967

Total years financial partner with City of Charlotte

First time applicant

Population served

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

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

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

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

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

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

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

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

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

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

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Charlotte Center for Legal Advocacy		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Organization Funding Support

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

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

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

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

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

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

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

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

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

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

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

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

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

Overall Agency Budget

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

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

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

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

Overall Program Budget

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

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

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

Current Board of Directors

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Treasurer

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Executive Committee Member

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Mr. Nicholas Harris

Ms. Georgia Krueger

Mr. Luther T. Moore

Ms. Erica Nesmith

Ms. Alexandra Villarreal O'Rourke

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Executive Committee Member

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Mr. Steven Cohen

Mr. J. Porter Durham, Jr.

Mr. Donald Jonas

Ms. Allie Lin

Ms. Gena Graham Morris

Mr. Matthew Robertson

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Ms. Angela Zimmern,
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Ms. Gwendolyn Lewis,
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Ms. Julia Burgess

Ms. DeCora Cooper

Ms. Angelica Garnett

Mr. Alan Kronovet

Mr. Andres Lopez

Ms. Elizabeth Murphy

Ms. Julie Christine Spahn

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

Mission Statement

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

Agency established

January 01, 2019

Total years financial partner with City of Charlotte

12 years

Population served

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Charlotte Regional Business Alliance		✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A

Organization Funding Support

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

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

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

No information provided by applicant for this section.

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

No information provided by applicant for this section.

Overall Agency Budget

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

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

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

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

Performance Objectives Report

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

Comments/ Explanation:

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

Current Board of Directors

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

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

Mission Statement

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

Agency established

February 20, 2004

Total years financial partner with City of Charlotte

16 years

Population served

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

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Community Building Initiative		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Organization Funding Support

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

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

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

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

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

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

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

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

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

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

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

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

Overall Agency Budget

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

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

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

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

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

Performance Reporting

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

Comments/Explanation:

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

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

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

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

Comments/Explanation:

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

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

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Engage a diverse spectrum of residents in real-time opportunities and promote dialogue to build connections across difference and raise awareness, increase understanding and promote action and response to significant community issues.	<ul style="list-style-type: none"> Number of community engagement offerings 	92 See Note #4	20-30	42 See Note #4
	<ul style="list-style-type: none"> Percentage, on average, of participants and partners in community engagement offerings who rate their experience as <i>valuable</i> or <i>very valuable</i> 	See Note #5	75%	See Note #5
	<ul style="list-style-type: none"> Number of Equity Impact Circle sessions provided 	123 See Note #6	16-24	27
	<ul style="list-style-type: none"> Percentage of EIC participants and organizations/groups who rate their experience as <i>valuable</i> or <i>very valuable</i> 	95%	75%	See Note #6

Comments/Explanation:

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

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

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

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

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

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

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

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

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

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

Current Board of Directors

Cathy Best	Caroline Griffin, Treasurer	Rick McDermott, Vice-Chair
Jeep Bryant	Megan Liddle Gude	Kerbie Neal
Carola Cárdenas	Byron Hawkins, Chair	Justin Perry
Betsy Conway	Brian Heslin	Kendel B. Phillips
Ray Feaster	Joshua Lanning	Ely Portillo
Sally Geaney	Troy Leo	Derrick Ramos
Willie Ratchford	Osei Sencherey	Martha Yesowitch
Eugene Young		

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

Mission Statement

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

Agency Established

October 30, 1975

Total years financial partner with City of Charlotte

30 years

Population served

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

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

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

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

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

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

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

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

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Greater Enrichment Program		✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A

Organization Funding Support

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

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

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

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

Overall Agency Budget

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

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

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

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

Overall Program Budget

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

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

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

Performance Objectives Report

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

Current Board of Directors

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

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FY 2023 Financial Partner Agency Summary

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

(New Funding Request)

Mission Statement

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

Agency established

June 10, 1988

Total years financial partner with City of Charlotte

First time applicant

Population served

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

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

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

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

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

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

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

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

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

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum								
<table border="1"> <thead> <tr> <th colspan="2">Key</th> </tr> </thead> <tbody> <tr> <td>Submitted</td> <td>✓</td> </tr> <tr> <td>Incomplete</td> <td>⚠</td> </tr> <tr> <td>Not submitted</td> <td>✗</td> </tr> </tbody> </table>		Key		Submitted	✓	Incomplete	⚠	Not submitted	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A
Key																			
Submitted	✓																		
Incomplete	⚠																		
Not submitted	✗																		

Organization Funding Support

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

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

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

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

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

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

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

Mecklenburg County Public Health Department / Village HeartBEAT

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

Valerie Woodard Community Resource Center

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

Charlotte-Mecklenburg Schools

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

Overall Agency Budget

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

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

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

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

Overall Program Budget

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

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

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

Current Board of Directors

Heather McCullough

Tiffany Morgan

Marcella Beam

Mark Brumfield

Seth Harward

Logan McCloy

Captain Christian Wagner

Tim Beyer

Rob Jones

Mary Ellen Ezarsky

Andrea Gardin

Jennifer Chesser

Kelli Raulerson

John Cheek

Lisa Murray Adams

Claude Ellis Forehand II

Jessica Castrodale

Joseph Machicote

Yuly Rodriquez

FY 2023 Financial Partner Agency Summary

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

(Current Financial Partner)

Mission Statement

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

Agency established

February 18, 2020

Total years financial partner with City of Charlotte

3 years

Population served

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

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum								
<table border="1"> <tr> <th colspan="2">Key</th> </tr> <tr> <td>Submitted</td> <td>✓</td> </tr> <tr> <td>Incomplete</td> <td>⚠</td> </tr> <tr> <td>Not submitted</td> <td>✗</td> </tr> </table>		Key		Submitted	✓	Incomplete	⚠	Not submitted	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A
Key																			
Submitted	✓																		
Incomplete	⚠																		
Not submitted	✗																		

Organization Funding Support

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

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

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

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

Activities for the MBK Vanguard include:

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

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

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

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

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

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

No information provided by applicant for this section.

Overall Agency Budget

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

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

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

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

Performance Objectives Report

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

Comments/ Explanation:

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

Current Board of Directors

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

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

Kenneth Burton
 Frank Barnes
 Eric Lewis
 Teddy McDaniel
 Anthony Trotman

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FY 2023 Financial Partner Agency Summary

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

Mission Statement

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

Agency established

May 01, 2017

Total years financial partner with City of Charlotte

5 years

Population served

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

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

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

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

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

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

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
National Institute of Minority Economic Development – The Women’s Business Center of Charlotte		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Organization Funding Support

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

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

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

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

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

WBCC activities and programs include:

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

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

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

Overall Agency Budget

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

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

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

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

Overall Program Budget

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

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

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

Performance Objectives Report

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022	
Create business owner capacity building programs to enhance entrepreneur opportunity to become economically self-sufficiency	<ul style="list-style-type: none"> ■ Development & Implementation of Four Business Capacity Building Programs ■ Completion of program <ul style="list-style-type: none"> ○ Game Changer (2020) ○ Run-Start-Grow Ready 2 Market (2020) ○ Business Funding Series (2021) ○ Women of Financial Character ○ Women Moving Forward Focus ○ Women of Extraordinary Executive Power (2021) ○ Supply Chain Center of Excellence (2020-2021) ○ Game Changer 2021 (Ver 2) ○ Business Funding Series (2022) ○ Game Changer 2022 (Ver 3) ○ Supply Chain Center of Excellence (2021-2022) ○ Catch the Tech Fever 	<ul style="list-style-type: none"> ■ 100% ○ 80% ○ 80% ○ 100% ○ 100% ○ 80% ○ 80% ○ 80% ○ 30 ○ 15 ○ 20 ○ 10 	<ul style="list-style-type: none"> 100% 87% 100% 100% 100% 100% 90% 100% 88% N/A N/A 20 N/A 	<ul style="list-style-type: none"> 75% N/A N/A N/A N/A N/A 100% 88% 14 16 20 20 20 	
	<ul style="list-style-type: none"> ■ # of interested participants in training programs from 10 to 15 or 20 	<ul style="list-style-type: none"> ■ 90% 	<ul style="list-style-type: none"> 100% 	<ul style="list-style-type: none"> 85% 	
		<ul style="list-style-type: none"> ■ client participation rate during training ■ Client retention, referral reapply for new programs ■ Client growth, development & capacity 	<ul style="list-style-type: none"> ■ 88% ■ 45% ■ 75% 	<ul style="list-style-type: none"> N/A 40% 80% 	<ul style="list-style-type: none"> 90% 35% 65%

Comments/ Explanation:

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

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

New programs for fiscal 2021-2022

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

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Provide resources, tools, mentorship, and assistance to M/WSBE & Veteran Entrepreneurs who desire to start, grow, and manage small businesses in the city of Charlotte CSA area -	▪ #Businesses Trained & Counseled	▪ 726	1200	222
	▪ #Hours Counseled	▪ 150	310	34
2021-2022 Metrics	▪ Number of Businesses Served	▪ 90%	150%	31%
	▪ Number of Access to Capital	▪ 23	23	35
	▪ Number of Business Starts	▪ 20	28	10%

Comments/ Explanation:

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

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

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

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

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Provide resources, tools, mentorship, and assistanceto M/WSBE & Veteran Entrepreneurs who desire to start, grow, and managesmall businesses in the city of Charlotte CSA area -	▪ #Businesses Trained & Counseled	▪ 726	1200	222
	▪ #Hours Counseled	▪ 150	310	34
2021-2022 Metrics	▪ Number of Businesses Served	▪ 90%	150%	31%
	▪ Number of Access to Capital	▪ 23	23	35
	▪ Number of Business Starts	▪ 20	28	10%

Comments/ Explanation:

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

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

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

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

Current Board of Directors

Nikitra Bailey

Karla Haynes

Tyrone Baines

Lori Jones Gibbs

Martin Eakes

Adam Klein

Ted Edwards

Lewis H. Myers

Dr. Edward Fort

Sue Malone

Troy Roberts

Jeanne C. Tedrow

Michael Suggs

FY 2023 Financial Partner Agency Summary

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

(Current Financial Partner)

Mission Statement

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

Agency established

March 21, 1909

Total years financial partner with City of Charlotte

40 years

Population served

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Safe Alliance		✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A

Organization Funding Support

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

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

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

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

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

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

Overall Agency Budget

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

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

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

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

Program Budget

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

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

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

Performance Objectives Report

Goal	Measure	Target	Year-End FY21	Mid-Year FY22
Reduce Crime	<ul style="list-style-type: none"> Develop Safety Plans 	<ul style="list-style-type: none"> 90% of 4000 victims will develop safety plans 	3888	3566
	<ul style="list-style-type: none"> Complete DVPO paperwork 	<ul style="list-style-type: none"> 1100 victims will complete protection order paperwork 	732	365
	<ul style="list-style-type: none"> Accompany clients to civil and criminal court 	<ul style="list-style-type: none"> 4750 victims will be accompanied to court 	1348	1685
	<ul style="list-style-type: none"> Positive responses from clients on outreach survey regarding safety 	<ul style="list-style-type: none"> 80% of clients will indicate an increase in their Collective Impact personal safety subscale after receiving services 	78%	84%

Comments/ Explanation:

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

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

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

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

Goal	Measure	Target	Year-End FY21	Mid-Year FY22
Increase Perception of Safety	<ul style="list-style-type: none"> Assist with and provide information regarding Victims Compensation 	<ul style="list-style-type: none"> 300 victims will receive information and/or assistance regarding Victims Compensation 	69	73
	<ul style="list-style-type: none"> Support sexual assault victims at local area hospitals 	<ul style="list-style-type: none"> 110 sexual assault victims will receive support at area hospitals 	3	0
	<ul style="list-style-type: none"> Percentage of victims seen at area hospitals that acknowledge the support provided to them by trained staff or volunteer companions 	<ul style="list-style-type: none"> 95% of victims will report that trained staff or volunteer companions were helpful 	100%	0%

Comments/ Explanation:

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

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

Current Board of Directors

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

FY 2023 Financial Partner Agency Summary

Agency Name: **Sword of Spirit Outreach Inc.**

(New Funding Request)

Mission Statement

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

Agency established

October 10, 2017

Total years financial partner with City of Charlotte

First time applicant

Population served

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum								
<table border="1"> <tr> <th colspan="2">Key</th> </tr> <tr> <td>Submitted</td> <td>✓</td> </tr> <tr> <td>Incomplete</td> <td>⚠</td> </tr> <tr> <td>Not submitted</td> <td>✗</td> </tr> </table>		Key		Submitted	✓	Incomplete	⚠	Not submitted	✗	✗	✓	✓	✓	✗	✓	✗	✗	✗	✓
Key																			
Submitted	✓																		
Incomplete	⚠																		
Not submitted	✗																		
Sword of Spirit Outreach		✗	✓	✓	✓	✗	✓	✗	✗	✗	✓								

Application notes:

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

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

Organization Funding Support

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

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

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

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

Overall Agency Budget

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

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

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

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

Overall Program Budget

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

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

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

Current Board of Directors

Michael Norman
Courtney Clarke

Sierra Egerton
Anjuvira Nabajuna

Dante Wilkerson
Michael Harris

FY 2023 Financial Partner Agency Summary

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

(New Funding Request)

Mission Statement

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

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

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

Agency established

October 06, 2021

Total years financial partner with City of Charlotte

First time applicant

Population served

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

Application Status		Salary Disclosure	501(c)3 letter	Current Board of Directors	Org Chart	Annual Audit	Federal Tax Returns	Financial Policies	Human Resource Policies	Record and Retention Schedule	Addendum
Key											
Submitted	✓										
Incomplete	⚠										
Not submitted	✗										
Time Out Care		✓	✓	✓	✓	N/A	✓	✓	✓	✓	N/A

Organization Funding Support

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Overall Agency Budget

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

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

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

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

Current Board of Directors

Marc Bergren Carl Baxter Leonard Hillard
 Lisa Dancy Andre Speech

FY 2023 Financial Partner Agency Summary

Agency Name: **TreesCharlotte**

(Current Financial Partner)

Mission Statement

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

Agency established

January 01, 2013

Total years financial partner with City of Charlotte

4 years

Population served

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

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

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

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

Organization Funding Support

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

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

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

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

Overall Agency Budget

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

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

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

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

Performance Objectives Report

Corporate Scorecard Objective: Safeguard the environment

Goal	Measure	Target	Year-End FY2021	Mid-Year FY2022
Safeguard the environment	<ul style="list-style-type: none"> Planting trees in under- canopied parts of Charlotte 	<ul style="list-style-type: none"> 3,300 trees planted/givenaway to plant 	5,897 trees planted/given away to plant	2,760 trees planted/given away to plant
	<ul style="list-style-type: none"> Adding trees to school campuses, where our youngest citizens are 	<ul style="list-style-type: none"> Working with up to 6 CMSschools/charter schools oncampus plantings 	Planted trees at 4 CMS campuses	Planted trees at 5 CMS campuses
	<ul style="list-style-type: none"> Educating residents on propercare of trees 	<ul style="list-style-type: none"> Deliver 15 educationalevents 		Hosted 12 education events

Corporate Scorecard Objective: Strengthen neighborhoods

Goal	Measure	Target	Year-EndFY2021	Mid-Year FY2022
Strengthen neighborhoods	<ul style="list-style-type: none"> Involve new neighborhoods intree planting 	<ul style="list-style-type: none"> 12 neighborhood plantings/distributi ons 	10 neighborhood plantings/ distribution events	Hosted 5 neighborhood/ community plantings/ distribution events
	<ul style="list-style-type: none"> Create neighborhood engagement Improve health, shade and economic value of neighborhood 	<ul style="list-style-type: none"> Pilot tree care program in Revolution Park and Historic West End where TreesCharlotte and other partners assess and cover tree care costs for qualifying residents 	New program	A tree assessment wasdone in Revolution Parkand application opened to residents to cover care costs. Hosted TreeAdoption for residents of Historic West End.

Corporate Scorecard Objective: Invest in infrastructure

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

Corporate Scorecard Objective: Enhance education and engagement opportunities

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

Comments/ Explanation:

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

Current Board of Directors

Thus Morton

Robert A. Bartlett

Sam Bowels

Peggy Brookhouse

Kodwo Ghartey-Tagoe

Mary Hall

Rob Harrington

Marcus Jones

Paul Kardous

Susan McDonough

Susan McKeithen

John Petrone

Stoney Sellars

Chris Thomas

DEDICATED REVENUE

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FY 2023 Financial Partner Agency Summary

Agency Name: **Charlotte Center City Partners**

Mission Statement

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

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

Agency established

July 01, 1979

Total years financial partner with City of Charlotte

40 years

Population served

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

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

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

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

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

Organization Funding Support

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

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

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

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

Overall Agency Budget

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

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

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

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

Current Board of Directors

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

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FY 2023 Financial Partner Agency Summary

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

Mission Statement

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

Agency established

July 01, 2004

Total years financial partner with City of Charlotte

40 years

Population served

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

Organization Funding Support

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

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

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

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

Overall Agency Budget

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

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

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

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

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

Current Board of Directors

Jon Dressler	Boris Bunich	Lorie Spratley
Mike Evans	Thomas Dolan	Clarke Allen
Kimberly Edmonds Nelson	Tom Sasser	Ervin Gourdine
Dockery Clark	Karen Bentley	Vinay Patel
Erma Allen		

FY 2023 Financial Partner Agency Summary

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

Mission Statement

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

Agency established

July 01, 2004

Total years financial partner with City of Charlotte

40 years

Population served

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

Organization Funding Support

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

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

Overall Agency Budget

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

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

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

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

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

Overall Program Budget

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

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

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

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

Current Board of Directors

- | | | |
|-------------------------|---------------|----------------|
| Jon Dressler | Boris Bunich | Lorie Spratley |
| Mike Evans | Thomas Dolan | Clarke Allen |
| Kimberly Edmonds Nelson | Tom Sasser | Ervin Gourdine |
| Dockery Clark | Karen Bentley | Vinay Patel |
| Erma Allen | | |

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FY 2023 Financial Partner Agency Summary

Agency Name: **University City Partners**

Mission Statement

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

Agency established

January 01, 2003

Total years financial partner with City of Charlotte

20 years

Population served

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

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

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

Organization Funding Support

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

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

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

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

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

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

Overall Agency Budget

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

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

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

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

Current Board of Directors

Stuart Parks

Ryan Wetherington

George Dunlap

Leslie Johnson

Renee Perkins Johnson

Todd Dunn

Bill Leonard

Richmond Baker

Joyce Tompkins

Michael Fung

Shannon Dixon

Tom Creter

Jane Wu,

Betty Doster

Lat Purser

Phil Nicholenko

Taiwo Jaiyeoba

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Housing and Neighborhood Services

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FY 2023 Financial Partner Agency Summary

Agency Name: **Carolinas CARE Partnership**

Scope of Service:

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

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

Mission Statement:

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

FY 2022: \$2,938,627

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

FY 2023 Request: \$3,085,558

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

Increase: \$146,931

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

Agency Established: 1989

Total Years Financial Partner with City of Charlotte

24 Years

Population Served:

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

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

Performance Objectives Report

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

Overall Agency Budget

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

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

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

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

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

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

Overall Program Budget

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

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

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

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

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

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

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

FY 2023 Financial Partner Agency Board of Directors

Agency Name: Carolinas Care Partnership

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

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

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

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

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

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

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

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

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

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

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FY 2023 Financial Partner Agency Summary

Agency Name: **Crisis Assistance Ministry**

Scope of Service:

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

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

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

Mission Statement:

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

FY 2022: \$425,000

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

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

Increase: \$125,000

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

Agency Established: 1975

Total Years Financial Partner with City of Charlotte: 34 Years

Population Served:

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

Performance Objectives Report

Corporate Scorecard Objective:

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

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

Overall Agency Budget

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

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

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

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

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

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

Overall Program Budget

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

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

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

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

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

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

FY 2023 Financial Partner Agency Board of Directors

Agency Name: Crisis Assistance Ministry

Melissa Agnew

LPL Financial

Mitchell Baldwin

Mecklenburg Community Church

Lucinda Blue

Johnson C. Smith University

Stuart Christhilf (Vice Chair)

Pamlico Capital

Lori Crowder

Fifth Third Bank

Tanqueray Edwards (Secretary)

JLL (Jones Lang LaSalle)

Gina Esquivel

Civic Canvas

Kati Everett

Novant Health

Quentin Fogan

Bank of America-Merrill Lynch

Debra Foster

Debra L. Foster, PLLC

Wendy Franklin

Atrium Health

Tamera Green

Viridian Marketing

Jarrod Jones

Dream Key Partners

Andrew Ladd

Communities in Schools

Michael Martino

Wells Fargo

Alexis McDaniels

Robinhood Financial

Steve Newmark

Roush-Fenway Racing

Stuart Proffitt

Proffitt Dixon Partners

Lisa Quisenberry (Chair)

Community Volunteer

Nikhil Sawant (Treasurer)

Foundation For The Carolinas

Ken Szymanski

Retired, Community Volunteer

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

Scope of Service:

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

Mission Statement:

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

FY 2022: \$1,921,000

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

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

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

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

Increase: \$320,000

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

Agency Established: 1989

Total Years Financial Partner with City of Charlotte: 32 Years

Population Served:

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

Performance Objectives Report

Corporate Scorecard Objective: Affordable Housing

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

Corporate Scorecard Objective: House Charlotte

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

Overall Agency Budget

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

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

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

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

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

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

Overall Program Budget – Affordable Housing

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

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

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

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

Total funds received from Mecklenburg County, if applicable:

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

Overall Program Budget – House Charlotte

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

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

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

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

Total funds received from Mecklenburg County, if applicable:

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

Board of Directors

- | | |
|---|--|
| Ms. Nicole Baldon (2020-2022) | Ms. Jessica Beil Hindman (2022-2024) |
| Ms. Astrid Chinnos (2021-2023) | Mr. Chris Jackson (2020-2022) |
| Ms. Elyse Dashew (2020-2022) | Mr. Dave Kautter (2021-2023) |
| Mr. Fred Dodson, Jr. (Assistant Secretary) | Mr. Raymond (Raki) McGregor (2020-2022) |
| Mr. David R. Finnie, CPA (2022-2024) | Ms. Jacqueline O’Garrow (2020 – 2022) (Chair) |
| Honorable Linwood O. Foust (2021-2023) | Ms. Julie A. Porter (President) |
| Mr. Malcolm Graham (2022-2025) | Mr. Winston A. Robinson (2020-2022) |
| Mr. Kevin Granelli (2020-2022) | Mr. Ken Schor (2020-2022) |
| Mr. Rickey Hall (2022-2024) | Mr. James R. Simpson (2022-2024) (Vice Chair) |
| Ms. Brenda Hayden (2022-2025) | Mr. Joaquin Soria (2022-2025) |

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FY 2023 Financial Partner Agency Summary

Agency Name: **Local Initiatives Support Corporation**

(Charlotte Office)

Scope of Service:

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

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

Mission Statement:

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

FY 2022: \$200,000

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

FY 2023 Request: \$200,000

Increase: \$0

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

Agency Established: 2019 - Local office established

Total Years Financial Partner with City of Charlotte: 3 Years

Population Served:

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

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

Performance Objectives Report

Corporate Scorecard Objective: Support Small Businesses

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

Corporate Scorecard Objective: Support Small Businesses

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

Overall Agency Budget

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

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

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

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

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

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

Overall Program Budget

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

Expenditures FY 2021 - FY 2023				
	FY 2021 Actual	FY 2022 Budget	FY 2023 Projected Budget	FY 2023 City Request
Personnel				
Salaries	\$527,292	\$588,196	\$605,841	\$123,518
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Total funds received from Mecklenburg County, if applicable for each fiscal year:

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

Local Initiatives Support Corporation (LISC)

Board of Directors

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

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

Lisa Glover

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

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Senior Fellow, Strive Together
Cincinnati, OH (2012 – Current)

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New York, NY (2018 – Current)

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

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New York, NY (2020 – Current)

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Greater Milwaukee Foundation
Milwaukee, WI (2013 – Current)

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Chairman & CEO
USBancorp Community Development
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Chief Marketing Officer & Chief
Sustainability Officer – Morgan
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Current)

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Tom Espinoza

President & CEO
Raza Development Fund
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Isidore Horween Associate Research
Professor of Business Administration
University of Virginia
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Bank of America
New York, NY (2020 – Current)

Rey Ramsey

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Centri Capital
Washington, DC (2002 – Current)

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

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

Alisahah Jackson, MD

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

Randy Oostra

President & CEO
ProMedica
Toledo, OH (2018 – Current)

Richard “Rip” Rapson

President & CEO
The Kresge Foundation
Troy, MI (2006 – Current)

Curtis Reed, Jr.

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

Jerry Rickett

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

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

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

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Questions & Answers from the March 9 Budget Workshop

Published on April 2, 2022

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Section 1

Steady State Affordability Update

1. Can you provide a breakdown of the difference between Certificates of Participation debt and Bond debt?

General Obligation (GO) bonds provide a way for the city to borrow money from lenders, pledging the full faith and credit of the city to repay the loan through tax revenue. The issuance of GO bonds requires both the approval of voters through the referendum process and the approval of the Local Government Commission. The city sells GO bonds to pay for expenses associated with capital projects or any public improvement as described in North Carolina General Statute Section 159-48. Bond sales are held as needed based on the cash flow needs of the projects being financed. The city manages its GO bond cash flow through the use of bond anticipation notes.

Certificates of Participation (COPs) is an alternative financing method that does not require voter approval. The city may enter into COPs (e.g., installment sales) contracts for buildings or equipment using the building or equipment as collateral to secure the financing. COPs should only be used when the property being financed has sufficient value to secure the debt and will have a useful life longer than the term of the financing. Issuances of COPs are made in accordance with the provisions of North Carolina General Statute Section 159-153 and with the approval of the Local Government Commission.

	GO Bonds	COPS
Voter Approval Required	Yes	No (Public hearing will occur)
Collateral	Full faith and credit of the city	The asset (i.e., buildings and equipment)
Uses	Streets, neighborhoods, housing	Property, facilities, and equipment mostly

2. What are the impacts of rate increases/decreases on the debt model?

The rate is the annual interest rate on debt when the city borrows funds to finance projects. An increase in the rate will increase financing costs in the model and a decrease in the rate will produce savings in the model. Each type of financing – general obligation (GO), certificates of participation (COPS), or bond anticipation notes (BAN) – assumes an applicable rate based on the type of debt. The rates currently assumed in the model range from 4.0 to 5.0 percent on fixed rate, long term debt. As an example, for a \$200 million bond, a quarter-point increase or decrease can generate \$5.25 million in additional costs or savings for the city, respectively.

Section 2

Transportation Capital Investments

- 1. Can you provide a breakdown of how streetlights are paid for? What is the city responsible for on the build, and what is the city billed per streetlight once the lights are operational?**

Thoroughfare streetlights are mainly funded by the city through capital projects or by private developers.

- Capital investment projects such as new roadways or sidewalk projects typically include new streetlighting as part of the overall scope. The city also funds stand-alone thoroughfare streetlighting projects through the Transportation Safety (vision Zero) Program established in 2018.
- Private developers fund installation of streetlighting associated with their projects. Private developer installations located in the city's right-of-way may be transferred to the city's Duke Energy account after completion.

Local streets (residential streetlights) are installed based on requests from the public. If the neighborhood desires more decorative lighting beyond the standard wood pole, the neighborhood is responsible for paying upfront fixture and installation costs. The Housing and Neighborhood Services Department offers decorative lighting as an eligible item through the Neighborhood Matching Grants Program.

The city partners with Duke Energy to provide streetlighting. At the city's request, Duke Energy prepares design plans and performs the actual installation. The city is responsible for right-of-way or easements, encroachment agreements with NCDOT on state-maintained roads, and site preparation such as grading or coordination of third-party utility relocation.

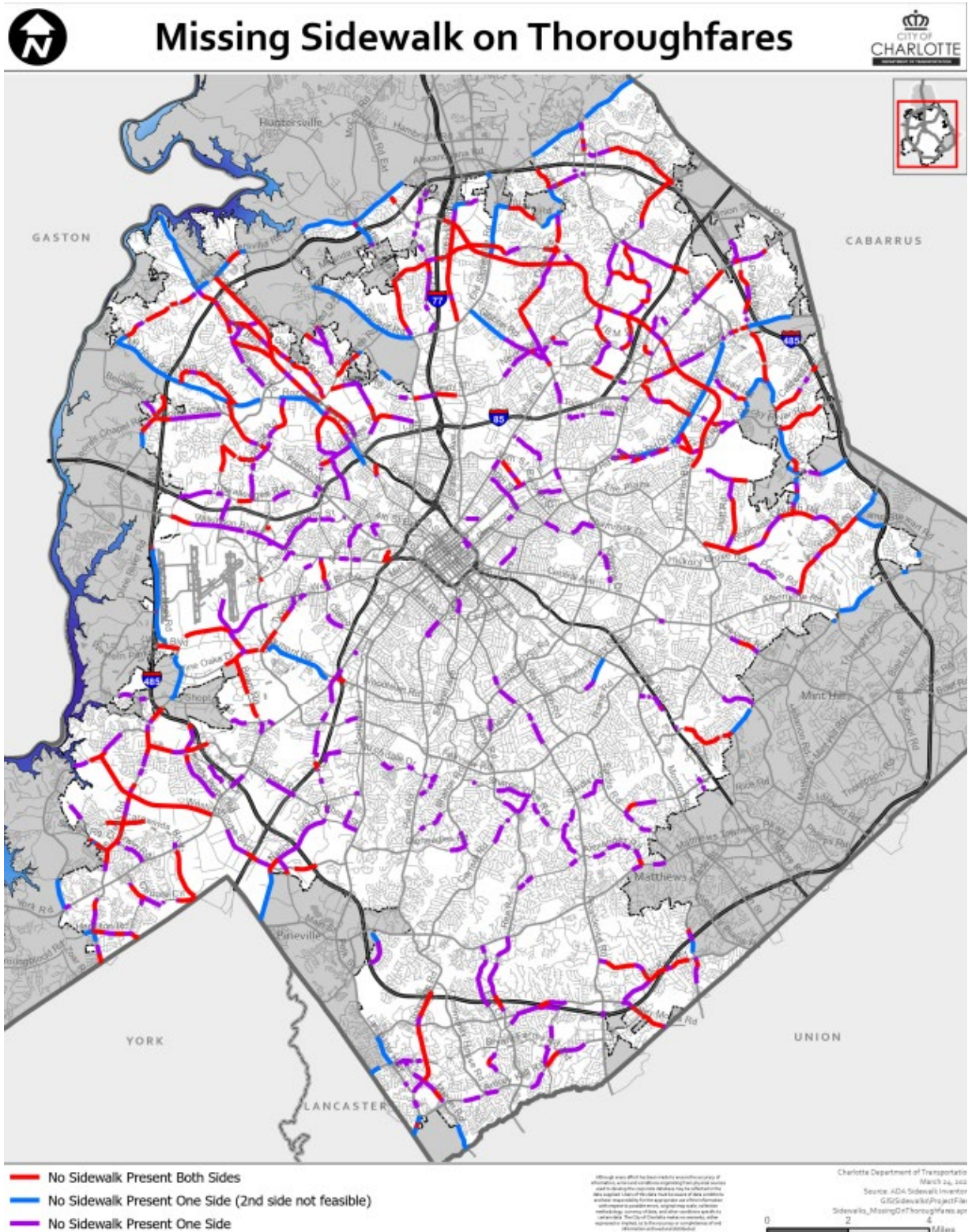
Once construction is completed, Duke Energy adds the streetlights to the city's account through a service agreement. The cost for electricity and on-going maintenance is about \$120-\$240 per light annually based on the North Carolina Utility Commission's rate schedule. This ongoing cost is paid through the city's General Fund which annually amounts to about \$9.5 million but is expected to increase to \$9.8 million by the end of FY 2022.

- 2. How does the city move forward with smart transportation devices, specifically in items the city is replacing?**

Where feasible, the city seeks to upgrade transportation devices to the most current models available as they are replaced. A critical component of building and maintaining safe streets includes a mobility strategy that provides a safe and connected transportation network. This includes constantly scanning nationwide best practices and technology solutions from peer cities to determine feasible options that may further enhance the safety of Charlotte's transportation network. The city has a long-standing commitment to using its capital programs to upgrade the technology needed to support an intelligent transportation. At crosswalks, for example, pedestrian signal push buttons are upgraded to include the Accessible Pedestrian Signal feature which provides an audible warning for visually impaired pedestrians.

3. What is the breakdown of streets with zero sidewalks?

The map below illustrates locations with sidewalk missing on one side of the thoroughfare or both sides throughout the City of Charlotte.



4. What opportunities may be available for the federal infrastructure money?

The Bipartisan Infrastructure Investment and Jobs Act memo provided to Council by Manager Jones on March 11th outlines the funding opportunities available in the Infrastructure Act. Below is a summary of the six types of funding opportunities made directly available to local governments:

- Local Government Competitive Grants – 29 programs (22 new), \$92 billion available nationwide
- Local Government Formula Funding – 4 programs (1 new), \$64 billion available to transit agencies and airports nationwide
- Federal Loan and Reimbursement Programs – 3 programs, \$1.5 billion available nationwide
- Local Government Sub-Grants – 5 programs (3 new), \$4.9 billion available nationwide
- Local Government Loans from States – 5 programs (2 new), \$46 billion available to utilities nationwide
 - Note: Charlotte Water has reached the state-imposed \$100 million loan ceiling for the Clean Water State Revolving Fund for wastewater projects. Since the loan ceiling is an agency-imposed cap and not the result of legislative action, Charlotte Water is working with the NC Department of Environmental Quality on options to lift the ceiling.
- State Formula Funding for Strategic Needs – 10 programs (6 new), \$189 billion available to states
 - Note: This is an informational item. The city will not apply for or manage any of these funds, but departments should be aware of potential funding coming to the state as synergies could be developed between competitive grants for local governments and formula funding.

Specifically for the City of Charlotte, of the 56 opportunities above:

- 46 are directly relevant to Charlotte
- 42 require an application for consideration (2 of which must be submitted by the Charlotte Regional Transportation Planning Organization)
- 4 are formula based and do not require an application

Please see the attached memo for additional information.

5. What portion of capital funding is available to fix existing sidewalks? What is the backlog of sidewalk repairs?

Capital funding is used for new sidewalk construction, while repair and maintenance of sidewalks is funded through the city's General Fund and is based on current needs and prioritization. The city maintains sidewalks along most roadways within the city limits of Charlotte. Once a sidewalk repair request is received, a supervisor is dispatched to evaluate the damage and determine what repairs are needed. Supervisors provide updates on repairs and reach out if additional information is needed or if the location does not fall under the city's maintenance responsibility.

CDOT's Street Maintenance Division has approximately 168 outstanding sidewalk service requests. On average each month, the city receives approximately 80 sidewalk service requests and closes out approximately 78 requests. The existing requests combined with new incoming requests translate to roughly a three-month backlog of work for the department. Staffing shortages and difficulties receiving concrete prevent the department from aggressively tackling the backlog at this time. The department is actively hiring additional personnel and recently purchased a truck that makes concrete on site. This eliminates the dependence on local concrete plants for supply and delivery.

Residents are encouraged to report damaged sidewalks using one of the following methods:

- Call 311 or 704-336-7600 to report a sidewalk in need of repair. It is helpful to include an address if available, but if no address is available, the street where the damaged sidewalk is located along with the nearest cross street will be sufficient.
- The public can also submit requests through the [online portal](#) and/or the [CLT+ app](#) (select the Sidewalk Repair category and fill in the requested information).

6. What is the policy for street pavement on state-maintained roads? Can we inform the public which streets are maintained by the State?

The city does not perform pothole repairs or resurfacing on state-maintained roads. Referrals are sent to the North Carolina Department of Transportation (NCDOT) when repairs are needed.

CDOT is working with Charlotte Communication and Marketing to add easily accessible information to the city's website on what streets are State owned and how to request repairs.

NCDOT contact information:

- Report maintenance needs to NCDOT through the State's [Report a Problem webpage](#). The public can report potholes, highway debris, malfunctioning traffic signals, and much more.
- The public can also directly call the NCDOT Division 10 office at 980-523-0000.

7. What technology solutions can be implemented to improve signalized intersections near schools to increase safety along walking routes? What is the associated cost?

One of the ways CDOT is making Charlotte more pedestrian friendly is by implementing Leading Pedestrian Intervals (LPI) at signalized intersections. The LPI is a traffic signal operation that gives pedestrians a walk signal before vehicles traveling parallel to pedestrians get a green signal. LPIs give pedestrians a 3-10 second head start into the intersection and have been shown to reduce crashes between vehicles and pedestrians by as much as 60 percent. LPI upgrades occur through city projects as well as land development projects. Funding to implement LPIs at existing signals is prioritized based on achieving safety and connectivity goals, where proximity to schools is a factor in the overall criteria evaluated. There are approximately 40 traffic signals in close proximity to school zones that do not have LPIs.

Additional funding directed at LPI deployment near schools would accelerate the pace of improving safety for walking routes to schools. When deploying LPI, the entire signalized intersection is evaluated to ensure it meets ADA standards. Infrastructure improvements are frequently needed to meet these standards, including new curb ramps and pedestrian signal push buttons. Feasibility evaluations have not been conducted at these 40 locations. A conservative estimate is \$120,000 per intersection which will be refined as conceptual design work is performed.

8. Provide a list of congestion mitigation projects.

Below is a map showing currently funded projects and a corresponding table with individual project details. The city's Department of Transportation is also evaluating the feasibility of additional potential improvements to determine the next prioritized list of projects to move into design.



Mitigate Congestion Program Summary

3/30/2022

Project Name	Total Project Cost Estimate	Project Description	Current Phase
Graham St & WT Harris Blvd & Mallard Creek Rd	\$132,545	Improvements incorporated in U-2507A project: A. Extend a 3rd westbound through lane on WT Harris Blvd from Research Dr to Technology Dr B. Construct right turn lane on westbound WT Harris Blvd at Medical Plaza Dr C. Construct dual lefts on northbound IBM Dr at WT Harris Blvd	Complete
Lancaster Hwy & Ballantyne Commons Pkwy Intersection <i>*Developer Partnership</i>	\$1M	Extend a second southbound thru lane on Lancaster Hwy from Ballentyne Commons Pkwy to Southcrest Ln	Design
Sardis Rd N & Coronation Blvd Intersection	\$280,000	Add 80' left turn lane with 50' taper in planted median	Planning
Sharon Rd & Eastburn Rd Intersection	\$3.5M	Remove superelevation, modify radius and add northbound left turn lane on Sharon Rd	Design
Steele Creek Rd & Erwin Rd Intersection <i>*Developer Partnership</i>	\$2,100,000	Provide southbound left turn lane on Steele Creek Rd	Design & ROW
Steele Creek Rd & Sam Neely Rd Intersection	\$770,000	Construct dedicated 150-200' southbound right turn lane on Steele Creek Rd	Design
Steele Creek Rd & Shopton Rd West Intersection	\$800,000	Construct additional northbound thru lane. Project includes removing the existing concrete median to shift the left turn lane over. Use the gored out area to maintain similar storage length for the new left turn lane, and use the current left turn lane and some of the gored out area to develop a second northbound lane.	Design
S Tryon St & Shopton Rd West Intersection <i>*Developer Partnership</i>	TBD	Add 600' +/- Sidewalk connection on Shopton Rd	Design & ROW

9. What is the status of WT Harris streetlighting from The Plaza to Old Concord Rd? How much will it cost and where does it fall in the list of priorities?

The project is currently ranked #3 on the prioritized list for Thoroughfare Street Lighting. The city’s Department of Transportation estimates it will cost approximately \$800,000 - \$1 million. Funding to begin design is anticipated to be available as part of 2024 Bonds under the draft bond plan included in the FY 2022 budget. Projects are prioritized using data from the High Injury Network and our Vision Zero Action Plan. See the table below for additional information of funded and prioritized street lighting projects, a map of these projects is also highlighted in the response to Question 3 of this Section.

UNLIT THOROUGHFARE STREET LIGHTING PROJECTS

FUNDED			
	<i>Project Name</i>	<i>Begin</i>	<i>End</i>
	Billy Graham Pkwy Street Lighting	I-85	S Tryon St
	Equipment Dr Street Lighting	N Graham St	Mineral Springs Rd
	Grier Rd Street Lighting	WT Harris Blvd	Rocky River Rd
	Reagan Dr Street Lighting	N Graham St	I-85 Connector
	W Sugar Creek Rd Street Lighting	Equipment Dr	Nevin Rd
	West Blvd & I-77 Underpass Lighting	NA	NA
	WT Harris Blvd Street Lighting	I-485	Mount Holly-Huntersville Rd
PRIORITIZED, FUTURE BOND			
<i>Rank</i>	<i>Project Name</i>	<i>Begin</i>	<i>End</i>
1	S Tryon St Street Lighting	Carowinds Blvd	City Limits
2	Brookshire Blvd Street Lighting	Mount-Holly Huntersville Rd	Long Creek
3	WT Harris Blvd Street Lighting	Old Concord Rd	The Plaza
4	N Tryon St Street Lighting	Institute Cir	Wednesbury Blvd
5	University City Blvd Street Lighting	North Tryon St	WT Harris Blvd
6	University City Blvd Street Lighting	Old Concord Rd	City Limits
7	Brookshire Blvd Street Lighting	Idaho Dr	I-77
8	Brookshire Blvd Street Lighting	Rozzelles Ferry Rd	City Limits
9	Brookshire Blvd Street Lighting	Belhaven Blvd	Fred D Alexander Blvd

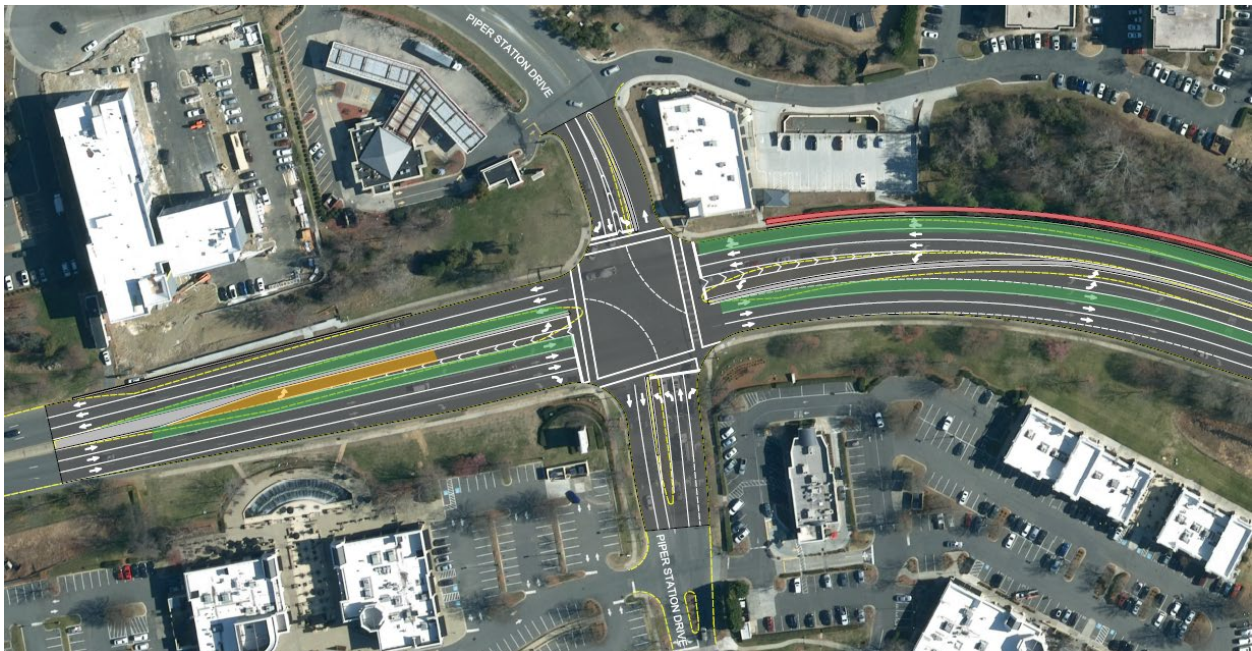
Section 3

Advanced Planning Fund Projects

1. Is the Rea Road widening project intended to reduce congestion, and if so, how? How are we making this more pedestrian-centric?

The Rea Road widening project will reduce congestion through the addition of new through lanes, the conversion of a single left turn lane to a dual left, and the lengthening of another left turn lane between I-485 and Williams Pond Lane. The additional lanes will allow more vehicles to travel through the intersections while the turn lane additions will add more turn lane capacity, thus reducing delays caused by turn lane traffic backing up into the through lanes. The improvements increase capacity by moving an additional 3,300 vehicles (33 percent more) in the morning and 850 vehicles (6 percent more) in the evening peak hours.

Most of the widening is accomplished by converting the wide grass medians to lanes with concrete medians. This option reduces many impacts that traditional widening projects encounter. There is also some widening that will occur by adjusting the location of the curbs. Existing five-foot sidewalks will remain or be replaced with six-foot sidewalks in areas where the curb is moved. The intersections will be restriped and signal timing modified to allow pedestrians to have adequate time to cross. See pictures below.



Rea Road and Piper Station Drive Intersection (Green = new through lane; Orange = new or lengthened turn lane, Red = 6' wide sidewalk)



Rea Road and Ballantyne Commons Parkway Intersection (Green = new through lane; Orange = new or lengthened turn lane, Red = 6' wide sidewalk)

2. Provide a description of the Robinson Church Road project and a summary of funding including the grant funding from CRTPO.

The Robinson Church Road project will upgrade the existing 2-lane street to a 3-lane street with intermittent left turn lanes, pedestrian refuge islands, curb and gutter, multi-use paths, planting strips, street trees and street lighting. It will also increase capacity at three key intersections along the corridor. The intersection improvements include extending existing storage lane lengths at the WT Harris Blvd and Robinson Church Rd intersection, constructing a two-lane roundabout at the Robinson Church Road and Plott Road/Highland Avenue intersection, and installing a new traffic signal with dedicated left turn lanes on 3 approaches at the Hood Rd and Robinson Church Rd intersection.

The project is estimated to cost between \$61-68 million, depending on project phasing and bond year funding. It received \$6.2 million in CRTPO funding for construction in FY 2026.

Section 4

2022 – 2028 Bond Strategy and Priorities

1. Could a list be provided of possible allocations for the remaining bond capacity? Can the list be organized by priority areas?

The base 2022 Bond Scenario that was included at the March workshop included \$25.7 million in new bond capacity for the 2022 Bond. However, in order to replace the recent state Powell Bill reduction for street resurfacing, a portion of that new capacity would need to be devoted to street resurfacing to maintain (or improve) the city’s street resurfacing cycle. The four tables below represent the remaining bond capacities after various street resurfacing scenarios. It should also be noted that the city is exploring other funding sources to enhance street resurfacing beyond transportation bonds.

Base Scenario: Represents the 2022 Bond scenario that was shown at the March workshop.

Scenario A: Represents the remaining bond capacity if the state Powell Bill reduction is replaced by transportation bond funds over two years. This action replaces the state reduction but does not provide additional funds to account for recent growth in street resurfacing cost or in the growth of the road network.

Scenario B: Represents the remaining bond capacity if the state Powell Bill reduction is replaced, plus an additional \$3 million/year (\$6 million/bond) added to the Street Resurfacing program. This action would result in a street resurfacing cycle equal to approximately 30 years.

Scenario C: Represents the remaining bond capacity if the state Powell Bill reduction is replaced, plus an additional \$6 million/year (\$12 million/bond) is added to the Street Resurfacing program. This action would result in a street resurfacing cycle equal to approximately 25 years.

Base 2022 Bond Scenario	
Project/Program	2022 Bond (millions)
Create and Preserve Affordable Housing	\$50.0
Support Ballantyne Reimagined Infrastructure	\$8.8
Improve Infrastructure for Centene Development	\$3.0
Reimburse Innovation District Infrastructure (Atrium)	\$5.0
Promote Public/Private Partnerships	\$3.0
Resurface Streets	\$8.0
Connect Northeast Corridor Infrastructure	\$6.0
Repair and Replace Bridges	\$5.0
Upgrade Traffic Control Devices	\$4.5
Maintain Intelligent Transportation Systems	\$4.0

Base 2022 Bond Scenario	
Project/Program	2022 Bond (millions)
Improve Sidewalk and Pedestrian Safety	\$50.0
Invest in Corridors of Opportunity	\$10.0
Mitigate Congestion	\$10.0
Connect Bicycle Facilities	\$8.0
Enhance Transportation Safety (Vision Zero)	\$4.0
Improve Eastway Drive/Shamrock Drive Intersection	\$12.7
Improve Rea Road with Bonus Allocation Funding	\$7.3
TOTAL	\$199.3
Remaining Capacity in Steady State	\$25.7

Scenario A: Replace Powell Bill Reduction with Bonds	
Project/Program	2022 Bond (millions)
Create and Preserve Affordable Housing	\$50.0
Support Ballantyne Reimagined Infrastructure	\$8.8
Improve Infrastructure for Centene Development	\$3.0
Reimburse Innovation District Infrastructure (Atrium)	\$5.0
Promote Public/Private Partnerships	\$3.0
Resurface Streets	\$21.6
Connect Northeast Corridor Infrastructure	\$6.0
Repair and Replace Bridges	\$5.0
Upgrade Traffic Control Devices	\$4.5
Maintain Intelligent Transportation Systems	\$4.0
Improve Sidewalk and Pedestrian Safety	\$50.0
Invest in Corridors of Opportunity	\$10.0
Mitigate Congestion	\$10.0
Connect Bicycle Facilities	\$8.0
Enhance Transportation Safety (Vision Zero)	\$4.0
Improve Eastway Drive/Shamrock Drive Intersection	\$12.7
Improve Rea Road with Bonus Allocation Funding	\$7.3
TOTAL	\$212.9
Remaining Capacity in Steady State	\$12.1

Scenario B: Replace Powell Bill Reduction, Plus Add \$6 million for Street Resurfacing (Reduces resurfacing cycle to 30 years)	
Project/Program	2022 Bond (millions)
Create and Preserve Affordable Housing	\$50.0
Support Ballantyne Reimagined Infrastructure	\$8.8
Improve Infrastructure for Centene Development	\$3.0
Reimburse Innovation District Infrastructure (Atrium)	\$5.0
Promote Public/Private Partnerships	\$3.0
Resurface Streets	\$27.6
Connect Northeast Corridor Infrastructure	\$6.0
Repair and Replace Bridges	\$5.0
Upgrade Traffic Control Devices	\$4.5
Maintain Intelligent Transportation Systems	\$4.0
Improve Sidewalk and Pedestrian Safety	\$50.0
Invest in Corridors of Opportunity	\$10.0
Mitigate Congestion	\$10.0
Connect Bicycle Facilities	\$8.0
Enhance Transportation Safety (Vision Zero)	\$4.0
Improve Eastway Drive/Shamrock Drive Intersection	\$12.7
Improve Rea Road with Bonus Allocation Funding	\$7.3
TOTAL	\$218.9
Remaining Capacity in Steady State	\$6.1

Scenario C: Replace Powell Bill Reduction, Plus Add \$12 million for Street Resurfacing (Reduces resurfacing cycle to 25 years)	
Project/Program	2022 Bond (millions)
Create and Preserve Affordable Housing	\$50.0
Support Ballantyne Reimagined Infrastructure	\$8.8
Improve Infrastructure for Centene Development	\$3.0
Reimburse Innovation District Infrastructure (Atrium)	\$5.0
Promote Public/Private Partnerships	\$3.0
Resurface Streets	\$33.6
Connect Northeast Corridor Infrastructure	\$6.0
Repair and Replace Bridges	\$5.0
Upgrade Traffic Control Devices	\$4.5
Maintain Intelligent Transportation Systems	\$4.0
Improve Sidewalk and Pedestrian Safety	\$50.0
Invest in Corridors of Opportunity	\$10.0
Mitigate Congestion	\$10.0
Connect Bicycle Facilities	\$8.0
Enhance Transportation Safety (Vision Zero)	\$4.0
Improve Eastway Drive/Shamrock Drive Intersection	\$12.7
Improve Rea Road with Bonus Allocation Funding	\$7.3
TOTAL	\$224.9
Remaining Capacity in Steady State	\$0.1

Additional Capacity Beyond Street Resurfacing

Depending on the scenario around street resurfacing, available capacity (\$0.1 to \$12.1 million) may be included in the Proposed Budget based on three safety focus areas that the City Manager referenced at the workshop. These were: sidewalks, pedestrian safety, and street lighting.

Whether it be construction of a new street, redesign of an intersection, or implementation of program funding, all City of Charlotte transportation infrastructure prioritizes safety. Targeted pedestrian safety projects are completed out of multiple bond programs, including the Sidewalk and Pedestrian Safety Program, Vision Zero, and Traffic Control Devices Upgrades. Pedestrian safety tools funded through those programs include: sidewalk construction along thoroughfares; pedestrian crossings, refuge islands, pedestrian signals; streetlighting; neighborhood traffic calming efforts; and leading pedestrian intervals at intersections. Together, these initiatives help create a safer city-wide pedestrian network.

2. How will the 2040 Vision Plan impact future capital decisions?

Future capital project prioritization and selection will be influenced by the Charlotte Future 2040 Comprehensive Plan’s 10 goals, which incorporate the Equitable Growth Framework and other Council-

adopted and planned policies such as the Strategic Energy Action Plan and the Strategic Mobility Plan. Potential capital project review through the Comprehensive Plan's lens will help create an objective assessment of whether a project implements the city's comprehensive vision by promoting equity, economic growth, positive community impact, and sustainability.

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CITY MANAGER'S OFFICE
MEMORANDUM

March 11, 2022

TO: Mayor Vi Lyles and City Council

FROM: Marcus Jones, City Manager

CC: Tracy Dodson, Brent Cagle, Shawn Heath, Dana Fenton

SUBJECT: Bipartisan Infrastructure Investment & Jobs Act Update

FUNDING OVERVIEW

There are six types of funding made directly and indirectly available to local governments through the Bipartisan Infrastructure Investment & Jobs Act:

- **Local Government Competitive Grants** – 29 programs (22 new), \$92B available nationwide
- **Local Government Formula Funding** – 4 programs (1 new), \$64B available to Transit Agencies and Airports nationwide
- **Federal Loan And Reimbursement Programs** – 3 programs, \$1.5B available nationwide
- **Local Government Sub-Grants** – 5 programs (3 new), \$4.9B available nationwide
- **Local Government Loans From States** – 5 programs (2 new), \$46B available to utilities nationwide
 - *Note: Charlotte Water has reached the state-imposed \$100 million loan ceiling for the Clean Water State Revolving Fund for wastewater projects. Since the loan ceiling is an agency-imposed cap and not the result of legislative action, Charlotte Water is working with the NC Department of Environmental Quality on options to lift the ceiling.*
- **State Formula Funding For Strategic Needs** – 10 programs (6 new), \$189B available to States
 - *Note: This is an informational item. The City will not apply for or manage any of these funds, but Departments should be aware of potential funding coming to the State as synergies could be developed between competitive grants for local governments and formula-funding.*

OPPORTUNITIES FOR THE CITY OF CHARLOTTE

Of the 56 funding opportunities above:

- 46 are directly relevant to Charlotte
- 42 require an application for consideration (2 of which must be submitted by CRTPO)
- 4 are formula based and do not require an application

These funding opportunities are being developed within a number of Federal agencies, resulting in a variety of information available and anticipated timelines for application. In general, existing programs that received supplemental funds will come online the most quickly. New programs, both formula and competitive, will become available more gradually with additional information released



as it is finalized. While these funding opportunities are managed separately by various agencies, Charlotte’s ability to secure funding is dependent on telling a compelling story of how all of these funding opportunities will be leveraged together to meet local priorities.

WHATS BEEN DONE

Beginning in late January, the City Manager’s Office has been coordinating across relevant departments to:

- Develop project lists for funding sources
- Refine project list to ensure the project with the best chance of selection is developed
- Keep departments up to date as funding notifications and further information is released

This a new approach to what has been taken in previous years, when departments would work independently of one another to develop applications for their specific processes. The current approach ensures that the projects put forward:

- Meet City Council priorities and/or further City Council Key Initiatives
- Are coordinated across different applications, i.e., if a stormwater project supports a place-based investment in an economic development or transportation project
- Align with the recommended strategies provided in the Bipartisan Infrastructure Investment and Jobs Act:
 - Engage private financing using infrastructure as a platform
 - Build economic opportunity through development
 - Geographically align spending to support place-making
 - *The act makes investments that are explicitly focused on places (ports, waterfronts, post-industrial brown-fields, energy demonstration sites, etc.) and many more that are focused on issues irrespective of place (e.g., smart cities, safe streets, broadband and energy transmission). A skillful local implementation will require blending the place- and non-place focused investments to create transformations within a specific geography.*
 - Address climate crisis and build resiliency
 - Position your city as a clean energy and tech innovation hub

ADDITIONAL INFORMATION

The information below provides a short update on the current open applications the city is considering pursuing. Information on all relevant funding opportunities can be found in the appendix.

Funding Opportunity	Project Name	Lead Dept.	Status
RAISE Grants (Capital)	The Pearl Innovation District (Atrium)	Economic Development is coordinating with Atrium on the application, General Services will manage if awarded	Application closes April 14, 2022
Airport Terminal Program	Still under consideration	Aviation	Application closes March 28, 2022
Airport Infrastructure Grants (formula funding)	Projects associated with the fourth parallel runway (i.e.,	Aviation	\$215 million awarded over five years from FY 2022 to FY 2026



	north end-around taxiway, south end-around taxiway and south crossfield taxiway/deicing pads)		
Low-No Emission Grant Program and Grants for Buses and Bus Facilities	Zero-emission Buses	CATS	Application closes May 31, 2022

Preparations are being made for City Council to brief the City’s Congressional Delegation on the 2022 Federal Legislative Agenda on March 14 – 16. Additionally information will be provided by the city’s Intergovernmental Relations Manager prior to the trip.

APPENDIX

Summary of all relevant funding sources

Appendix: Bipartisan Infrastructure Investment & Jobs Act - Summary by Funding Type

► Local Government Competitive Grants

Section Title	Description	Notice of Funding Opportunity
<p><i>New:</i> Active Transportation Infrastructure Investment Program</p>	<p>(\$1 billion over 5 years) - Competitive Grants for States, local governments, and metropolitan planning organizations Creates active transportation infrastructure investment program to make grants, on a competitive basis, to states, local governments, and metropolitan planning organizations for planning grants and to construct eligible projects that provide safe and connected active transportation facilities in an active transportation network or active transportation spine. The term “active transportation” means mobility options powered primarily by human energy, including bicycling and walking. The term “active transportation network” means facilities built for active transportation that connect between destinations within a community or metropolitan region, including:</p> <ul style="list-style-type: none"> • sidewalks • bikeways • pedestrian and bicycle trails 	
<p><i>New:</i> Safe Streets and Roads for All Grant Program</p>	<p>(\$5 billion over 5 years) - Competitive Grants for local governments and metropolitan planning organizations Establishes a grant program for metropolitan planning organizations, local governments, and tribal governments to develop and carry out comprehensive safety plans to prevent death and injury on roads and streets, commonly known as "Vision Zero" or "Toward Zero Deaths" initiatives.</p>	<p>Q2 2022</p>
<p><i>New:</i> Stopping Threats on Pedestrians</p>	<p>(\$25 million over 5 years) - Competitive Grants for States and local governments Establishes grant program to provide assistance to state departments of transportation and local government entities for bollard installation projects designed to prevent pedestrian injuries and acts of terrorism in areas used by large numbers of pedestrians. Local governments are eligible to apply for competitive grants.</p>	
<p>Local and Regional Project Assistance (<i>RAISE</i>)</p>	<p>(\$7.5 billion over 5 years) - Competitive Grants for States, local governments, and metropolitan planning organizations Authorizes and renames the RAISE/BUILD/TIGER program. Limits the size of each grant to \$25 million and provides an equal split between rural and urban areas. Local governments and metropolitan planning organizations are eligible entities. Eligible projects include:</p> <ul style="list-style-type: none"> • highway or bridge projects • public transportation projects • passenger rail or freight rail projects • port infrastructure • surface transportation components of an airport • project to replace or rehabilitate a culvert or prevent stormwater runoff for the purpose of improving habitat for aquatic species • any other surface transportation project that the Secretary considers to be necessary to advance the goals of the program 	<p>Due April 14, 2022</p>
<p><i>New:</i> National Infrastructure Project Assistance</p>	<p>(\$10 billion over 5 years) - Competitive Grants for States, local governments, and metropolitan planning organizations Establishes the National Infrastructure Project Assistance Program to provide single- or multiyear grants to projects generating national or regional economic, mobility or safety. Local governments and metropolitan planning organizations are eligible entities. Eligible projects include:</p> <ul style="list-style-type: none"> • highway or bridge projects • freight intermodal or freight rail project • railway-highway grade separation or elimination projects • intercity passenger rail projects • certain public transportation projects 	

Nationally Significant Multimodal Freight and Highway Projects (INFRA)	(\$8 billion over 5 years) - Competitive Grants for States, local governments, and metropolitan planning organizations Renames the Infrastructure for Rebuilding America (or INFRA grant program) to be the Nationally Significant Multimodal Freight and Highway Program. Raises the cap on multimodal (rail/port) projects from 10 percent to 30 percent of the grants for each year. Local governments and metropolitan planning organizations serving an urbanized area with a population of over 200,000 are eligible to apply for grants. This program is authorized by section 117 of title 23 . Follow this link to the USDOT INFRA Website .	Q1 2022
New: Prioritization Process Pilot Program	(\$50 million over 5 years) - Competitive Grants for States and metropolitan planning organizations Establishes a prioritization process pilot program to support data-driven approaches to planning that, on completion, can be evaluated for public benefit. Metropolitan planning organizations serving an urbanized area with a population of over 200,000 are eligible to apply for grants.	Q1 2022
New: Transportation Access Pilot Program	(Funds to be from administrative expenses) - Competitive Grants for States and metropolitan planning organizations Establishes a Transportation Access Pilot program to develop or procure accessibility data and make it available to each eligible entity selected to participate in the pilot program to improve transportation planning. States and metropolitan planning organizations are eligible to apply for competitive grants. The pilot will measure the level of access by surface transportation mode to important destinations such as jobs, healthcare facilities, childcare facilities, educational and workforce training facilities, housing, food sources, points within the supply chain for freight commodities, and domestic and international markets and connections between surface transportation modes	
New: Railway Crossing Elimination Program	(\$3 billion over 5 years)- Competitive Grants for States, local governments, and metropolitan planning organizations Authorizes a new competitive grant program for the elimination of hazards at railway-highway crossings. Local governments and metropolitan planning organizations are eligible entities.	
Consolidated Rail Infrastructure and Safety Improvements	(\$5 billion over 5 years) - Competitive Grants for States and political subdivisions Funds projects that improve the safety, efficiency, and reliability of intercity passenger and freight rail. Political subdivisions of states are eligible entities. Section 22907 of title 49 authorizes this program . Eligible projects include: <ul style="list-style-type: none"> • Deployment of railroad safety technology, including positive train control and rail integrity inspection systems • Capital project identified by the Secretary as being necessary to address congestion challenges affecting rail service. • Capital project identified by the Secretary as being necessary to reduce congestion and facilitate ridership growth in intercity passenger rail transportation along heavily traveled rail corridors. • Highway-rail grade crossing improvement project, including installation, repair, or improvement of grade separations, railroad crossing signals, gates, and related technologies, highway traffic signalization, highway lighting and crossing approach signage, roadway improvements such as medians or other barriers, railroad crossing panels and surfaces, and safety engineering improvements to reduce risk in quiet zones or potential quiet zones. • Rail line relocation and improvement project. • Preparation of regional rail and corridor service development plans and corresponding environmental analyses. • Any project that the Secretary considers necessary to enhance multimodal connections or facilitate service integration between rail service and other modes, including between intercity rail passenger transportation and intercity bus service or commercial air service. • Workforce development and training activities, coordinated to the extent practicable with the existing local training programs supported by the Department of Transportation, the Department of Labor, and the Department of Education. 	
New: Bridge Investment Program	(\$3.265 billion over 5 years) - Competitive Grants for States, local governments, and metropolitan planning organizations Establishes a new competitive grant program to assist state, local, federal, and tribal entities in rehabilitating or replacing bridges, including culverts. The minimum grant amount for a large project is not less than \$50 million; the minimum grant amount for any other eligible project is \$2.5 million. Grant amounts, in combination with other anticipated funds, should be of a size enough to enable the project to proceed through completion. The bridge program would include an application and evaluation process for large projects, after which the Transportation Secretary would submit an annual report to Congress on funding recommendations, based on project evaluations. Large projects will be funded with multi-year funding agreements like the Federal Transit Administration (FTA) Full Funding Grant Agreement (FFGA) program. At least 50 percent of program funds over five years must be used for large projects.	
New: National Culvert Removal, Replacement and Restoration Grant Program	(\$4 billion over 5 years) - Competitive Grants for States and local governments Creates a National Culvert Removal, Replacement and Restoration Program to provide grants to states, local governments and tribes to address anadromous fish passage as well as provide funding for certain freshwater impacts to marine fish and shellfish species.	

New: Wildlife Crossing Safety Program	<p>(\$350 million over 5 years) - Competitive Grants for States, local governments, and metropolitan planning organizations</p> <p>Establishes a competitive wildlife crossings pilot program to provide grants for projects that seek to achieve a reduction in the number of wildlife-vehicle collisions and improve habitat connectivity for terrestrial and aquatic species. States, metropolitan planning organizations and local governments are eligible to compete for such grants.</p>	
New: Grants for Charging and Fueling Infrastructure Program (Community Charging and Corridor Charging Program)	<p>(\$2.5 billion) - Competitive Grants for States, local governments, and metropolitan planning organizations</p> <p>This is a new competitive grant program added to the end of Section 151 of Title 23. Authorizes \$2.5 billion over five years to establish a grant program at DOT for Alternative Fuel Corridors as proposed in the Senate Committee on Environment and Public Works surface transportation reauthorization bill (S. 1931). The grant program would include a set-aside for Community Grants, under the surface transportation reauthorization. The program is designed to strategically deploy publicly accessible alternative fuel vehicle charging infrastructure along designated alternative fuel corridors or in certain other locations that will be accessible to all drivers of alternative fuel vehicles.</p> <ul style="list-style-type: none"> • Eligibility: Eligible entities are state and local governments, MPOs and other public-sector entities. • Use of Funds: Grants are to be used to contract with a private entity for acquisition and installation of publicly accessible alternative fuel vehicle charging and fueling infrastructure that is directly related to the charging or fueling of a vehicle. Eligible entities may use a portion of grant funds to provide a private entity operating assistance for the first five years of operations after infrastructure installation. • Community Grant Set-Aside: 50 percent of the total program funds will be made available each fiscal year for Community Grants, to install charging infrastructure in locations on public roads, schools, parks, and in publicly accessible parking facilities. These grants will be prioritized for rural areas, low- and moderate income neighborhoods and communities with low ratios of private parking or high ratios of multiunit dwellings. • Cost-Share: The federal cost share for a project may not exceed 80 percent. Further, as a condition of contracting with an eligible entity, a private entity must agree to pay the non-federal share of project costs. 	2022
New: Congestion Relief Program	<p>(\$250 million over 5 years) - Competitive Grants for States, local governments, and metropolitan planning organizations</p> <p>Establishes a congestion relief program in section 129 of title 23 to provide competitive grants to states, local governments and metropolitan planning organizations for projects in large urbanized areas (more than 1 million people) to advance innovative, integrated and multimodal solutions to congestion relief in the most congested metropolitan areas of the United States. Local governments in urbanized areas of populations of 1 million or more are included in the list of eligible entities. Grant awards shall be not less than \$10 million. When selecting grants, the DOT Secretary shall give priority to eligible projects located in urbanized areas that are experiencing high degrees of recurrent congestion. The federal cost-share shall not exceed 80 percent of the total cost of a project.</p>	
New: Healthy Streets Program	<p>(\$500 million over 5 years) - Competitive Grants for States, local governments, and metropolitan planning organizations</p> <p>Establishes the Healthy Streets program to provide grants to eligible entities to deploy cool pavements and porous pavements and to expand tree cover. The goals of the program are to mitigate urban heat islands, improve air quality and reduce the extent of impervious surfaces, storm water runoff and flood risks and heat impacts to infrastructure and road users. Local governments and metropolitan planning organizations are eligible to apply for competitive grants.</p>	
New: Promoting Resilient Operations for Transformative, Efficient and Cost-Saving Transportation (PROTECT) Program	<p>(\$7.3 billion in formula and \$1.4 billion in competitive grants, over 5 years) – Competitive Grants for States, local governments, and metropolitan planning organizations - Formula funding for States</p> <p>Establishes the PROTECT Grant Program, which would provide \$7.3 billion in formula funding and \$1.4 billion in competitive set-aside grants (over five years) for resilience improvements at the state and municipal levels. The PROTECT grants are intended to incentivize state and local communities as they seek to improve the resiliency of natural infrastructure such as wetlands, floodplains, and aquatic ecosystems. Specifically, the grants would provide planning and resilience improvement funding to communities to help to assess vulnerabilities to current and future weather events or other natural disasters, and to enhance transportation assets such as ports and port infrastructure. In addition to evaluating vulnerabilities, resilience improvement grants can be utilized to relocate infrastructure out of the floodplain and restore aquatic ecosystems connected to a transportation improvement. Local governments and metropolitan planning organizations are eligible to apply for competitive grants</p>	
New: Reconnecting Communities Pilot Program	<p>(\$500 million over 5 years) - Competitive Grants for States, local governments, and metropolitan planning organizations</p> <p>Establishes the Community Connectivity Pilot program through which eligible entities may apply for: 1) planning funds to study the feasibility and impacts of removing, retrofitting or mitigating existing transportation facilities that create barriers to mobility, access or economic development and 2) construction funds to carry out a project to remove, retrofit or mitigate an eligible facility and, if appropriate, to replace it with a new. An eligible facility includes a limited access highway, viaduct or any other principal arterial facility that creates a barrier to community connectivity, including barriers to mobility, access, or economic development, due to high speeds, grade separations or other design factors. Planning grant</p>	Q2 2022

	awards may not exceed \$2 million, and the federal cost share for a project may not exceed 80 percent. Capital construction grants must be at least \$5 million, and the federal cost share for a project may not exceed 50 percent. Local governments and metropolitan planning organizations are eligible to apply for both planning and construction competitive grants.	
<i>New:</i> Strengthening Mobility and Revolutionizing Grants Program	(\$500 million over 5 years)- Competitive Grants for States, local governments, and metropolitan planning organizations Creates new competitive grant program for eligible entities, such as local governments and metropolitan planning organizations, to conduct demonstration projects focused on advanced smart city or community technologies and systems in a variety of communities to improve transportation efficiency and safety.	
Bus and Bus Facilities Competitive 5339(b)	(\$2.34 billion over 5 years)- Competitive Grants for Transit Agencies Competitive grant program that assists in financing of buses and bus facilities capital projects, including replacing, rehabilitating, purchasing, or leasing buses or related equipment; and rehabilitating, purchasing, constructing, or leasing bus-related facilities. No less than 25 percent of funds shall be for projects related to the acquisition of low or no emission buses or bus facilities other than zero emission vehicles. This program is authorized by section 5339b of title 23 . Justice 40 Pilot program links to White House and Center for American Progress	Due May 31, 2022
No or Low Emissions Grants Competitive 5339(c)	(\$5.6 billion over five years) - Competitive Grants for Transit Agencies Program assists in acquiring, leasing, constructing facilities, and rehabilitating or improving facilities for low or no emissions transit vehicles. Section 5339(c) of title 23 authorizes this program . Justice 40 Pilot program links to White House and Center for American Progress	Due May 31, 2022
<i>New:</i> Rail Vehicle Replacement – State of Good Repair Grants 5337(f)	(\$1.5 billion over 5 years) - Competitive Grants for Transit Agencies New competitive grant program for rail vehicle replacement. Assists state and local governments in financing capital projects for replacement of rail rolling stock. Federal share up to 50% of eligible costs.	Q2 2022
Fixed Guideway Capital Investment Grants 5309	(\$15 billion over 5 years plus \$8 billion additional funding) - Competitive Grants for Transit Agencies This program is authorized section 5309 of title 49 . And program described fully in the program website . Among the changes made to the program are: <ul style="list-style-type: none"> Increases the threshold for capital costs from \$300 million to \$400 million, and federal share from \$100 million to \$150 million for Small Starts. Amends Core Capacity eligibility to use a 10- year timeframe versus 5 years to demonstrate capacity needs. Establishes a process to allow multiple projects in a community to move forward simultaneously for immediate and future bundling of projects allowing sponsors to seek savings during the contracting process. This replaces the "Program of Interrelated Projects" eligibility. 	
<i>New:</i> Midsize and Large Drinking Water System Infrastructure Resilience and Sustainability Program	(\$250 million over 5 years) - Competitive Grants for public water systems Authorizes \$50 million annually for the Drinking Water System Infrastructure Resilience and Sustainability grant program and creates a corresponding \$25 million per year Clean Water Infrastructure Resiliency and Sustainability Program, both of which would provide financing for resiliency projects, including conservation and supply augmentation projects, and reducing cybersecurity vulnerabilities.	
<i>New:</i> Clean Water Infrastructure Resiliency and Sustainability Program	(\$25 million per year over 5 years) - Competitive Grants for public water systems Planning, designing, or constructing projects (on a systemwide or area-wide basis) that increase the resilience of a publicly owned treatment works to a natural hazard or cybersecurity vulnerabilities.	
Sewer Overflow and Stormwater Reuse Municipal Grants	(\$1.4 billion over 5 years) - Competitive Grants for public water systems Authorizes funding for the Sanitary Sewer Overflow and Stormwater Reuse municipal grants at \$280 million annually for FY 2022 through FY 2026, with requirements to allocate at least 25 percent of such funds toward systems serving rural or otherwise disadvantaged communities. This program is authorized by section 1301 of title 33 .	
<i>New:</i> Water Data Sharing Pilot Program	(\$15 million per year) - Competitive Grants for public water systems Administrator may award grants to eligible entities to establish systems that improve the sharing of information concerning water quality, water infrastructure needs, and water technology, including cybersecurity technology, between States or among counties and other units of local government within a State, which may include— <ul style="list-style-type: none"> establishing a website or data hub to exchange water data, including data on water quality or water technology, including new and emerging, but proven, water technology; and intercounty communications initiatives related to water data. 	

New: Low Income Water Assistance Pilot Program	(Funding not specified) - Competitive Grants for public water systems Directs EPA to launch a pilot grant program to address water affordability. The pilot program will award grants to eligible entities to develop and implement programs to assist qualifying households with maintaining access to drinking water and wastewater treatment. Assistance could include discounted rates or direct financial support to households or debt relief to water system owners or operators.	
New: Airport Terminal Program	(\$5 billion over 5 years, \$1 billion available in FY22) – Competitive Grants for Airports Provide grants to eligible airports for capital improvements for airport terminal development generally defined as development of an airport passenger terminal building, including terminal gates; access roads servicing exclusively airport traffic that leads directly to or from an airport passenger terminal building; walkways that lead directly to or from an airport passenger terminal building; multimodal terminal development; and projects for on-airport rail access projects. As well as projects for relocating, reconstructing, repairing or improving an airport-owned airport traffic control tower.	Due March 28, 2022

Local Government Formula Funding:

Section Title	Description
Urbanized Area Formula Grants Formula 5307	(\$33.54 billion over 5 years) - Formula Funding for Transit Agencies Assist eligible recipients in financing capital projects to replace, rehabilitate, and purchase buses and related equipment, including technological changes or innovations to modify low or no emission vehicles or facilities; and to construct bus-related facilities. This program is authorized by section 5307 of title 23 .
State of Good Repair Grants Formula 5337	(\$16.89 billion over 5 years plus \$4.75 billion in additional funding) - Formula Funding for Transit Agencies Assist State and local governmental authorities in financing capital projects to maintain public transportation systems in a state of good repair , including projects to replace and rehabilitate rolling stock; track; line equipment and structures; signals and communications; power equipment and substations; passenger stations and terminals; security equipment and systems; maintenance facilities and equipment; operational support equipment, including computer hardware and software; development and implementation of a transit asset management plan ; and other replacement and rehabilitation projects the Secretary determines appropriate. This program is authorized section 5337 of title 49 . Additional funding of \$4.75 billion is allocated grants under section 5337 (c) and (d) of title 49, High Intensity Fixed Guideways and High Intensity Motorbus
Bus and Bus Facilities Formula 5339(a)	(\$3.1 billion over 5 years) - Formula Funding for Transit Agencies Formula funding that assists in financing of buses and bus facilities capital projects, including replacing, rehabilitating, purchasing, or leasing buses or related equipment; and rehabilitating, purchasing, constructing, or leasing bus-related facilities. This program is authorized by section 5339a of title 49 .
New: Airport Infrastructure Grants	(\$15 billion over five years) <ul style="list-style-type: none"> • Passenger Facility Charge (PFC) eligible projects except debt service payments. • Local match mirrors Airport Improvement Program (AIP). • \$2.48 billion annually for primary airports. • \$500 million annual for general aviation and non-primary airports. • \$20 million annually for competitive grants to construct, rehabilitate or relocate airport-owned contract towers. No local match. FAA will prioritize projects that enhance aviation safety and improve air traffic efficiency.

Local Government Sub-Grants & Loans from States:

Section Title	Description	Notice of Funding Opportunity
Building Resilient Infrastructure and Communities (BRIC) Program	(\$1 billion over 5 years) - Competitive Grants for States, Local governments are sub-applicants and must work through the State of North Carolina	Q3 2022

	<p>Provides \$1 billion over five years (\$200 million per year) for the Building Resilient Infrastructure and Communities (BRIC) Program. FEMA provides federal funds for the Building Resilient Infrastructures and Communities (BRIC) grant program to states, local communities, tribes, and territories for mitigation activities. BRIC is a FEMA annual hazard mitigation program. Section 5133 of title 42 authorizes this program. The priorities are to:</p> <ul style="list-style-type: none"> • Incentivize natural hazard risk reduction activities that mitigate risk to public infrastructure • Prioritize benefits to disadvantaged communities • Mitigate risk to one or more community lifelines • Incorporate nature-based solutions • Enhance climate resilience and adaptation • Increase funding to applicants that facilitate the adoption and enforcement of the latest published editions of building codes <p>Justice 40 Pilot program links to White House and Center for American Progress</p>	
Flood Mitigation Assistance Program	<p>(\$3.5 billion over 5 years) - Competitive Grants for States, Local governments are sub-applicants and must work through the State of North Carolina</p> <p>Provides \$3.5 billion over five years (\$700 million per year) for the Flood Mitigation Assistance program, which helps provide financial and technical assistance to states and communities to reduce the risk of flood damage to homes and businesses through buyouts, elevation, and other activities. Section 4104c of title 42 authorizes this program. Justice 40 Pilot program links to White House and Center for American Progress</p>	
New: Digital Equity Competitive Grant Program	<p>(\$1.25 billion) - States will competitively award grants - Local governments can serve as subgrantees</p> <p>Appropriates \$250 million per year for competitive grants to public and nonprofit entities for a range of digital inclusion and broadband adoption activities such as:</p> <ul style="list-style-type: none"> • To develop and implement digital inclusion activities that benefit covered populations • To facilitate the adoption of broadband by covered populations in order to provide educational and employment opportunities to those populations • To implement training programs for covered populations that cover basic, advanced, and applied skills • To make available equipment, instrumentation, networking capability, hardware and software or digital network technology for broadband services to covered populations at low or no cost • To construct, upgrade, expend or operate new or existing public access computing centers for covered populations through community anchor institutions 	
New: State & Local Cybersecurity Grant Program	<p>(\$1 billion) - States will competitively award grants - Local governments can serve as subgrantees</p> <p>Establishes a grant program at the Department of Homeland Security (DHS) to provide funding to state and local governments to address cybersecurity risks and threats.</p> <ul style="list-style-type: none"> • Cybersecurity Plans: In order to submit an application for this grant, eligible entities must submit a cybersecurity plan that incorporates plans to protect against cybersecurity risks and threats and describes plans to enhance cybersecurity. • Eligible Use of Funds: Funding recipients can use funding to implement a Cybersecurity Plan; develop or revise a Cybersecurity Plan; pay expenses related to grant administration; and assist with activities that address imminent cybersecurity threats, on a flexible basis. 	Q3 2022
Brownfields Grants	<p>(\$1.2 billion over 5 years) - States award to local agencies</p> <p>Provides \$1.2 billion over five years to the EPA's Brownfields program. This program provides grants for assessments of and cleanup of brownfields. This program is authorized by section 9604 of title 42.</p> <p>Justice 40 Pilot program links to White House and Center for American Progress</p>	Q4 2022
Drinking Water State Revolving Loan Funds	<p>(\$14.65 billion over 5 years) - States award to public water systems</p> <p>Authorizes funding through FY 2026 for the Drinking Water SRF, which provides capitalization grants to states for loans supporting water infrastructure projects. It would authorize: \$2.4 billion for FY 2022; \$2.75 billion for FY 2023; \$3 billion for FY 2024; and \$3.25 billion for each of FY 2025 and FY 2026. This program is authorized by section 300j-12 of title 42.</p> <p>Justice 40 Pilot program links to White House and Center for American Progress</p>	
Drinking Water State Revolving Loan Fund Lead Funding	<p>(\$11.73 billion over 5 years) - States award to public water systems</p>	

	<p>Lead service line placement projects and associated activities directly connected to the identification, planning, design, and replacement of lead service lines. 49 percent of the funds shall be used by the state to provide subsidy with 100 percent forgiveness of principal or grants (or any combination of these). This program is authorized by section 300j-19b of title 42.</p> <p>Justice 40 Pilot program links to White House and Center for American Progress</p>	
New: Drinking Water State Revolving Loan Funds for Emerging Contaminants	<p>(\$4 billion over five years) - States award to public water systems Additional \$4 billion is appropriated to address emerging contaminants or “forever” chemicals through the Drinking Water State Revolving Funds program. This program is authorized by section 300j-12 of title 42.</p> <p>Justice 40 Pilot program links to White House and Center for American Progress</p>	
Clean Water State Revolving Funds	<p>(\$14.65 billion over 5 years) - States award to public water systems Authorizes funding through FY 2026 for the Clean Water SRF, which provides capitalization grants to states for loans supporting water quality improvement projects. It would authorize: \$2.4 billion for FY 2022; \$2.75 billion for FY 2023; \$3 billion for FY 2024; and \$3.25 billion for each of FY 2025 and FY 2026. This program is authorized by section 1383 of title 33.</p> <p>Justice 40 Pilot program links to White House and Center for American Progress</p>	
New: Clean Water State Revolving Funds for Emerging Contaminants	<p>(\$1 billion over five years) - States award to public water systems Additional \$1 billion is appropriated to address emerging contaminants or “forever” chemicals through the Clean Water State Revolving Funds program.</p> <p>Justice 40 Pilot program links to White House and Center for American Progress</p>	

State Formula Funds for Strategic Needs:

Section Title	Description
New: Invasive Plant Elimination Program	<p>(\$250 million over 5 years) - Formula Funding for States New program that provides formula funding to States to either eliminate or manage certain nonnative invasive plants.</p>
Surface Transportation Block Grant Program	<p>(\$72 billion over 5 years) - Formula Funding for States, States must consult with local governments and metropolitan planning organizations This program is authorized by section 133 of title 23. Adds new eligibilities to the Surface Transportation Block Grant (STBG) Program, including:</p> <ul style="list-style-type: none"> • electric vehicle charging infrastructure and vehicle-to-grid infrastructure • installation and deployment of intelligent transportation technologies • projects that facilitate intermodal connections between emerging transportation technologies • resilience features • cybersecurity protections • waterfront infrastructure projects • projects to enhance travel and tourism
Highway Safety Improvement Program	<p>(\$15.575 billion over 5 years) - Formula Funding for States, States must consult with local governments and metropolitan planning organizations Allows flexibility for Highway Safety Improvement Program (HSIP) to be used for non-infrastructure activities and behavioral safety projects, such as educational campaigns about traffic safety and enforcement activities; and allows a state to spend up to 10 percent of its HSIP funding on such projects and Safe Routes to School non-infrastructure-related activities. This program is authorized by section 148 of title 23. Adds projects eligible for HSIP funding:</p> <ul style="list-style-type: none"> • Grade separation projects. • Construction or installation of features, measures, and road designs to calm traffic and reduce vehicle speeds. • Installation or upgrades of traffic control devices for pedestrians and bicyclists, including pedestrian hybrid beacons and the addition of bicycle movement phases to traffic signals.

	<ul style="list-style-type: none"> Roadway improvements that provide separation between pedestrians and motor vehicles or between bicyclists and motor vehicles, including medians, pedestrian crossing islands, protected bike lanes and protected intersection features.
Congestion Mitigation and Air Quality Improvement Program	<p>(\$13.2 billion over 5 years) - Formula Funding for States Adds eligibility for Congestion Mitigation and Air Quality Improvement Program (CMAQ) funds to be used on shared micro mobility, including bike share and shared scooter systems, as well as for the purchase of medium- or heavy-duty zero emission vehicles and related charging equipment. This program is authorized by section 149 of title 23.</p>
New: National Electric Vehicle Formula Program	<p>(\$5 billion over 5 years) - Formula Funding for States Appropriates \$1 billion per year for five years (\$5 billion total) to establish a National Electric Vehicle Formula Program to provide additional funding to states to deploy EV charging infrastructure.</p> <ul style="list-style-type: none"> Eligible Use of Funds: 1) Acquisition and installation of EV infrastructure to serve as a catalyst for the deployment of such infrastructure and to connect it to a network to facilitate data collection, access, and reliability; 2) operation and maintenance; and 3) data sharing about EV infrastructure. Charging stations must be located along a designated Alternative Fuel Corridor. Cost Share: The federal cost-share for a project may not exceed 80 percent. Private entity may pay the non-federal share of the cost of the project. State Proposals: Directs DOT to establish a deadline for states to provide a plan describing how the state plans to use the funding. Requires DOT and the U.S. Department of Energy (DOE) to develop, in concert, guidance for states and localities to strategically deploy EV charging infrastructure. Contract with Private Entity: Grants may be used to contract with a private entity for acquisition and installation of publicly accessible alternative fuel vehicle charging and fueling infrastructure that is directly related to the charging or fueling of a vehicle. Establishes Joint Office of Energy and Transportation: Establishes a Joint Office of Energy and Transportation at DOT and DOE to coordinate work on EV infrastructure, which would include new installation and interoperability standards.
New: Carbon Reduction Program	<p>(\$6.42 billion over 5 years) - Formula Funding for States, States must consult with metropolitan planning organizations Establishes a new carbon reduction program to reduce transportation emissions. 65 percent of funding under this program would be sub-allocated by population. Each State is required to develop a carbon reduction strategy, in consultation with any metropolitan planning organization, within two years after enactment. Eligible projects include:</p> <ul style="list-style-type: none"> Traffic monitoring, management and control facility or program Public transportation On-road and off-road trail facilities for pedestrians and bicyclists Advanced transportation and congestion management technologies Deployment of infrastructure-based intelligent transportation systems (ITS) capital improvements and the Installation of vehicle to infrastructure communications equipment Replacing street lighting and traffic control devices with energy-efficient alternatives Development of a carbon reduction strategy.
New: Promoting Resilient Operations for Transformative, Efficient and Cost-Saving Transportation (PROTECT) Program	<p>(\$7.3 billion in formula and \$1.4 billion in competitive grants, over 5 years) – Competitive Grants for States, local governments, and metropolitan planning organizations, Formula funding for States See page 3 under Local Government Competitive Grants</p>
New: Grants for Broadband Deployment	<p>(\$42.45 billion) - States will competitively award grants - Local governments can serve as subgrantees Authorizes formula-based grants to states to competitively award grants for qualifying broadband infrastructure, mapping, and adoption projects. The program would be administered by the National Telecommunications and Information Administration (NTIA), and funds would be available until expended. The U.S. Department of Commerce must provide a detailed spending plan to Congress 90 days after enactment. States would receive a minimum of \$100 million; the remaining funding would be allocated in accordance with a formula that considers the number of unserved and high-cost locations in the state, on a comparative basis. The funding includes a 10 percent set-aside for high-cost areas. All projects would have to meet a minimum download/upload build standard of 100/20 megabits per second. The bill requires local coordination on the part of the state. Specifically, the bill requires the state to submit a "5-year action-plan" as part of its proposal, which "shall be informed by collaboration with local and regional entities." States may use funds to competitively award sub-grants for:</p> <ul style="list-style-type: none"> Unserved areas (defined as an area that lacks access or access to 25/3 speed and latency sufficient to support real-time, interactive applications) and underserved service projects (defined as an area that lacks access to 25/100 speed and a latency sufficient to support real-time, interactive applications).

	<ul style="list-style-type: none"> Connecting eligible community anchor institutions, which is defined as an entity such as a school, library, health clinic, health center, hospital, or other medical provider; public safety entity; institution of higher education; public housing organization or community support organization that facilitates greater use of broadband service by vulnerable populations, including low-income individuals, unemployed individuals, and aged individuals. Data collection, broadband mapping, and planning.
New: State Digital Equity Capacity Grant Program	<p>(\$1.5 billion) - Formula Funding to States Appropriates \$60 million for planning grants to states to develop State Equity Plans. Funding of \$240 million for FY 2022 and \$300 million per year for FY 2023 to 2026 is provided to support implementation and digital inclusion initiatives. Makes distributions to states based on their populations, demographics, and availability and adoption of broadband.</p>
Workforce Development, Training and Education for Surface Transportation	<p>Workforce Development Allows states greater flexibility to address surface transportation workforce development, training, and education needs, including activities that address current workforce gaps, such as work on construction projects. Permits states to obligate funds for pre-apprenticeships, apprenticeships and career opportunities for on-the-job training and vocational school support. This program is authorized by section 504 of title 23. The program provides formula funding to States.</p>

Federal Loan and Reimbursement Programs:

Section Title	Description	Notice of Funding Opportunity
Transportation Infrastructure Finance & Innovation Act of 1998 Amendments	<p>(\$1.25 billion over 5 years) - States and local governments are eligible Adds new criteria to the streamlined application process for public agency borrowers to increase the likelihood that the U.S. Department of Transportation (DOT) Secretary will be able to move more projects through the process expeditiously. This program is authorized by chapter 6 of title 23 and is described in the USDOT Credit Programs Guide. New eligibilities include:</p> <ul style="list-style-type: none"> Public infrastructure located near transportation facilities to promote transit-oriented development Airport-related projects Economic development, including commercial and residential development, and related infrastructure and activities 	
Railroad Rehabilitation and Improvement Financing Reform	<p>States and local governments are eligible The program is described fully in the USDOT Credit Programs Guide. New eligibilities are added for:</p> <ul style="list-style-type: none"> housing near fixed guideway transit stations develop or establish new intermodal rail facilities to acquire, improve, or rehabilitate intermodal or rail equipment or facilities, including track, components of track, cuts and fills, stations, tunnels, bridges, yards, buildings, and shops, and to finance costs related to those activities, including pre-construction costs 	
Water Infrastructure Financing	<p>(\$250 million) - States and public water systems are eligible Reauthorizes the Water Infrastructure Financing Act for five years at \$50 million each year. This loan program is available for a number of environmental projects including projects for repair, rehabilitation, or replacement of a treatment works, community water system, or aging water distribution or waste collection facility. This program is authorized by chapter 52 of title 33.</p>	

Policies, Research, and Studies:

Section Title	Description
Metropolitan Transportation Planning for Highways	<p>Policy – Planning Amends the metropolitan transportation planning statute that is in the Highways title. The metropolitan transportation planning function is mandated by section 134 of title 23. An optional role for metropolitan planning organizations related to housing is added to section 134.</p>
Metropolitan Transportation Planning for Public Transportation	<p>Policy – Planning Amendments to the metropolitan transportation planning statute that is in the Public Transportation chapter. This program is authorized by section 5303 of title 49. An optional role for metropolitan planning organizations related to housing is added to section 5303.</p>
<p><i>New:</i> Advanced Transportation Research Projects Agency – Infrastructure and Open Research Initiative</p>	<p>Research & Studies</p> <ul style="list-style-type: none"> Establishes the Advanced Research Projects Agency-Infrastructure (ARPA-I) to fund research and development on advanced transportation infrastructure technologies. ARPA-I would support novel, early stage research as well as advance conceptual research into testing and development. <u>ARPA-I would establish process for eligible entities, including local governments, to submit unsolicited research proposals, which would be supported by \$50 million per year for each of fiscal years 2022 through 2026.</u> <p>This program was one of the higher priorities of the Secretary of Transportation for the Bipartisan Infrastructure Plan.</p>
Research and Technology Development and Deployment	<p>Research & Studies This program is authorized by section 503 of title 23. Changes include:</p> <ul style="list-style-type: none"> Expands the objectives of the DOT Turner Fairbank Highway Research Center to support research on nonmarket ready technologies in consultation with public and private entities. Establishes an Open Challenge and Research Proposal Pilot Program (subsection e) that provides grants for proposals to research needs or challenges identified or determined to be important by the Transportation Secretary. <u>Local governments are eligible to propose open highway challenges and research proposals that are linked to identified or potential research needs.</u> Expands the Technology and Innovation Deployment Program by adding a focus on accelerated market readiness efforts, and increases funding for the program, including \$100 million in new and innovative construction technologies for smarter, accelerated project delivery. Modifies the Advanced Transportation Technologies and Innovative Mobility Deployment program to include intermodal connectivity and a rural set-aside of not less than 20 percent; and expands the eligibility under this program to include retrofitting dedicated short-range communications (DSRC) technology deployed as part of an existing pilot program to cellular vehicle-to-everything technology, as well as advanced transportation technologies. Authorizes a new Center of Excellence on New Mobility and Automated Vehicles to research the impact of highly automated vehicles and new mobility, such as docked and dockless bicycles and electric scooters.
<p><i>New:</i> Safety Data Initiative</p>	<p>Research & Studies Provides grants to support and carry out applied research to develop practices and products that will encourage the integration and use of traditional and new sources of safety data and safety information to improve policy and decision-making at Federal, State, and local government levels. States, local governments, and metropolitan planning organizations are eligible entities.</p>
Broadband Affordability	<p>(\$14.2 billion) - Federal Program Direct to Consumers Makes the Emergency Broadband Benefit program at the Federal Communications Commission (FCC) permanent, renaming it to the Affordable Connectivity Program. The program provides a \$30 per month voucher for low-income families to use toward any internet service plan of their choosing. It builds on the Emergency Broadband Benefit, making the benefit permanent and expanding eligibility to help more low-income households.</p> <ul style="list-style-type: none"> Consumer Broadband Labels: Requires the display of "consumer broadband labels." Consumer broadband labels were proposed by the FCC in 2016 to help consumers better understand what they are receiving in terms of pricing, performance levels and data caps. Digital Discrimination: Requires the FCC to adopt rules within two years to address digital discrimination. It also directs the FCC to develop "model policies and best practices" for states and localities to prevent digital discrimination.

<p><i>New:</i> Digital Discrimination Policy</p>	<p>Policy Establishes as the policy of the US that:</p> <ul style="list-style-type: none"> • subscribers should benefit from equal access to broadband internet access service within the service area of a provider of such service • the term “equal access”, for purposes of this section, means the equal opportunity to subscribe to an offered service that provides comparable speeds, capacities, latency, and other quality of service metrics in a given area, for comparable terms and conditions • the Commission should take steps to ensure that all people of the United States benefit from equal access to broadband internet access service <p>The FCC is directed to develop model policies and best practices that can be adopted by states and local governments and is further directed to promulgate rules and regulations to facilitate equal access to broadband internet access service, taking into account the issues of technical and economic feasibility presented by that objective, including:</p> <ul style="list-style-type: none"> • preventing digital discrimination of access based on income level, race, ethnicity, color, religion, or national origin • identifying necessary steps for the Commissions to take to eliminate discrimination described above
<p><i>New:</i> Sense of Congress on Broadband and Digital Literacy</p>	<p>Policy It is the sense of Congress that:</p> <ul style="list-style-type: none"> • a broadband connection and digital literacy are increasingly critical to how individuals participate in the society, economy, and civic institutions of the United States; and access health care and essential services, obtain education, and build careers; • digital exclusion carries a high societal and economic cost; materially harms the opportunity of an individual with respect to the economic success, educational achievement, positive health outcomes, social inclusion, and civic engagement of that individual; and exacerbates existing wealth and income gaps, especially those experienced by covered populations • achieving digital equity for all people of the United States requires additional and sustained investment and research efforts; • the Federal Government, as well as State, tribal, territorial, and local governments, have made social, legal, and economic obligations that necessarily extend to how the citizens and residents of those governments access and use the internet; and • achieving digital equity is a matter of social and economic justice and is worth pursuing.
<p><i>New:</i> Cybersecurity Support for Public Water Systems</p>	<p>Policy Amends the Safe Drinking Water Act to add new section on Cybersecurity Support for Public Water Systems. Not later than 280 days after the date of enactment of this section, the Administrator shall submit to the appropriate Congressional committees (i) the Support Plan; and (ii) a list describing any public water systems identified by the Administrator, in coordination with the Director, as needing technical support for cybersecurity during the development of the Support Plan.</p>
<p><i>New:</i> Stormwater Infrastructure Technology</p>	<p>Research & Studies Authorizes not less than three nor more than five Centers of Excellence for Stormwater Control Infrastructure Technologies to be located throughout the country. Centers would be located in educational institutions</p>
<p><i>New:</i> Research into Water Infrastructure Technologies and Needs</p>	<p>Research & Studies Requires EPA to study safe drinking water technologies and community needs in the year following bill enactment. Provides \$75 million annually through FY 2026 for research, investigations, training, and informational grants authorized under Section 104 of the Clean Water Act.</p>
<p><i>New:</i> Disaster Relief Mobilization Study</p>	<p>Research & Studies Requires the Secretary of Transportation to study to determine the utility of incorporating the use of bicycles into the disaster preparedness and disaster response plans of local communities.</p>
<p><i>New:</i> State Human Capital Plans for Surface Transportation</p>	<p>Workforce Development Requires the Secretary of Transportation to encourage each State to develop a voluntary plan, to be known as a ‘human capital plan’, that provides for the immediate and long-term personnel and workforce needs of the State with respect to the capacity of the State to deliver transportation and public infrastructure.</p>