

**Consolidated Annual Performance & Evaluation Report
(CAPER)
Community Development Block Grant
HOME Investment Partnerships
Emergency Solutions Grant
Housing Opportunities for Persons With AIDS**



**September 28, 2023
FY 2022**

CR-05 - Goals and Outcomes

Progress the jurisdiction has made in carrying out its strategic plan and its action plan.

91.520(a)

The CAPER covers the period from July 1, 2022, to June 30, 2023, and describes the results and benefits produced by the City of Charlotte as projected by the City's FY2022-2023 Annual Action Plan.

The report provides an overview of the City of Charlotte's performance achievements to the U.S. Department of Housing and Urban Development (HUD) for various programs. These programs align with HUD's national goals to provide affordable and decent housing, create suitable living environments, and expand economic opportunities to benefit low and moderate-income households.

The City of Charlotte's goals build off the goals outlined in the 2021-2025 Consolidated Plan:

1. Provide temporary rental assistance
2. Finance Permanent supportive rental housing
3. Provide opportunities for homeownership
4. Provide programs to support persons with HIV/Aids
5. Increase the supply of affordable rental housing
6. Improve existing housing stock
7. Support facilities and programs for the homeless

Programs described in the CAPER are funded by both Federal and Local funds. The City uses local Affordable Housing funds to help supplement community development activities.

The Federal funds include:

1. Community Development Block Grant (CDBG)
2. HOME Investment Partnership (HOME)
3. Housing Opportunities for Persons with AIDS (HOPWA)
4. Emergency Solution Grant (ESG)

In FY2022, the City of Charlotte and its partners implemented a number of housing and community development activities in the Charlotte community. The following reflects a portion of the City's achievements in FY2022:

331 affordable housing units were produced through investments in new construction and housing rehabilitation using federal funding.

114 households received down-payment assistance to purchase a home.

6020 persons benefited from the Emergency Solution Grant and HOME-funded Tenant-Based Rental Assistance

Comparison of the proposed versus actual outcomes for each outcome measure submitted with the consolidated plan and explain, if applicable, why progress was not made toward meeting goals and objectives. 91.520(g)

Categories, priority levels, funding sources and amounts, outcomes/objectives, goal outcome indicators, units of measure, targets, actual outcomes/outputs, and percentage completed for each of the grantee’s program year goals.

Goal	Category	Source / Amount	Indicator	Unit of Measure	Expected – Strategic Plan	Actual – Strategic Plan	Percent Complete	Expected – Program Year	Actual – Program Year	Percent Complete
Improve existing affordable housing stock	Affordable Housing	CDBG: \$ / HOME: \$	Rental units rehabilitated	Household Housing Unit	250	0	0.00%	25	0	0.00%
Improve existing affordable housing stock	Affordable Housing	CDBG: \$ / HOME: \$	Homeowner Housing Added	Household Housing Unit	50	0	0.00%			
Improve existing affordable housing stock	Affordable Housing	CDBG: \$ / HOME: \$	Homeowner Housing Rehabilitated	Household Housing Unit	625	0	0.00%	100	0	0.00%
Increase neighborhood sustainability	Affordable Housing Non-Housing Community Development	CDBG: \$ / HOME: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	100	0	0.00%	25	0	0.00%

Increase neighborhood sustainability	Affordable Housing Non-Housing Community Development	CDBG: \$ / HOME: \$	Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit	Households Assisted	100	0	0.00%	50	0	0.00%
Increase neighborhood sustainability	Affordable Housing Non-Housing Community Development	CDBG: \$ / HOME: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	1250	223	17.84%			
Increase neighborhood sustainability	Affordable Housing Non-Housing Community Development	CDBG: \$ / HOME: \$	Rental units constructed	Household Housing Unit	150	0	0.00%	24	0	0.00%
Increase neighborhood sustainability	Affordable Housing Non-Housing Community Development	CDBG: \$ / HOME: \$	Rental units rehabilitated	Household Housing Unit	375	0	0.00%	12	0	0.00%
Increase neighborhood sustainability	Affordable Housing Non-Housing Community Development	CDBG: \$ / HOME: \$	Homeowner Housing Added	Household Housing Unit	50	115	230.00%	50		%

Increase neighborhood sustainability	Affordable Housing Non-Housing Community Development	CDBG: \$ / HOME: \$	Homeowner Housing Rehabilitated	Household Housing Unit	250	331	132.40%	8	331	4,137.50%
Increase neighborhood sustainability	Affordable Housing Non-Housing Community Development	CDBG: \$ / HOME: \$	Other	Other	200	16	8.00%			
Increase the supply of affordable rental housing	Affordable Housing	CDBG: \$60312 / HOME: \$500000	Rental units constructed	Household Housing Unit	0	0		12	0	0.00%
Increase the supply of affordable rental housing	Affordable Housing	CDBG: \$60312 / HOME: \$500000	Rental units rehabilitated	Household Housing Unit	0	0		12	0	0.00%
Promote businesses and a robust workforce	Non-Housing Community Development	Local: \$	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	Persons Assisted	1000	0	0.00%			
Promote businesses and a robust workforce	Non-Housing Community Development	Local: \$	Businesses assisted	Businesses Assisted	50	0	0.00%			

Provide assistance to households in crisis	Affordable Housing Homeless	ESG: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	1000	52	5.20%	85	52	61.18%
Provide assistance to households in crisis	Affordable Housing Homeless	ESG: \$	Homeless Person Overnight Shelter	Persons Assisted	12500	5916	47.33%	2700	5916	219.11%
Provide assistance to households in crisis	Affordable Housing Homeless	ESG: \$	Homelessness Prevention	Persons Assisted	1000	0	0.00%	100	0	0.00%
Provide assistance to households in crisis	Affordable Housing Homeless	ESG: \$	Housing for Homeless added	Household Housing Unit	0	0		50	0	0.00%
Provide assistance to households in crisis	Affordable Housing Homeless	ESG: \$	Other	Other	0	0		1	0	0.00%
Provide opportunities for homeownership	Affordable Housing	CDBG: \$1475000 / HOME: \$ / Local: \$	Public service activities for Low/Moderate Income Housing Benefit	Households Assisted	0	0		15	0	0.00%
Provide opportunities for homeownership	Affordable Housing	CDBG: \$1475000 / HOME: \$ / Local: \$	Homeowner Housing Added	Household Housing Unit	1625	114	7.02%	300	115	38.33%

Provide opportunities for homeownership	Affordable Housing	CDBG: \$1475000 / HOME: \$ / Local: \$	Direct Financial Assistance to Homebuyers	Households Assisted	0	0		125	0	0.00%
Provide programs to support persons with HIV/AIDS	Affordable Housing Homeless Non-Homeless Special Needs	HOPWA: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	0	0		348	223	64.08%
Provide programs to support persons with HIV/AIDS	Affordable Housing Homeless Non-Homeless Special Needs	HOPWA: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	500	83	16.60%	110	0	0.00%
Provide programs to support persons with HIV/AIDS	Affordable Housing Homeless Non-Homeless Special Needs	HOPWA: \$	Homelessness Prevention	Persons Assisted	300	199	66.33%	225	0	0.00%
Provide programs to support persons with HIV/AIDS	Affordable Housing Homeless Non-Homeless Special Needs	HOPWA: \$	Housing for Homeless added	Household Housing Unit	0	0		8	0	0.00%

Provide programs to support persons with HIV/AIDS	Affordable Housing Homeless Non-Homeless Special Needs	HOPWA: \$	Housing for People with HIV/AIDS added	Household Housing Unit	100	0	0.00%	26	0	0.00%
Provide programs to support persons with HIV/AIDS	Affordable Housing Homeless Non-Homeless Special Needs	HOPWA: \$	HIV/AIDS Housing Operations	Household Housing Unit	2500	18	0.72%			
Provide temporary rental assistance		HOME: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	250	69	27.60%	60	70	116.67%

Table 1 - Accomplishments – Program Year & Strategic Plan to Date

Assess how the jurisdiction’s use of funds, particularly CDBG, addresses the priorities and specific objectives identified in the plan, giving special attention to the highest priority activities identified.

The City of Charlotte and its partners continue to make the housing, community development and safety needs of Charlotte’s low and moderate-income residents the focal point for federal and local funded programs. The City’s success in neighborhood revitalization is measured by increased homeownership; housing construction and rehabilitation, and investments in removing economic barriers for low and moderate income families and neighborhood improvements. CDBG funding in FY2022 was specifically focused on three areas: Housing Rehabilitation, Down Payment Assistance, and the SAFE Charlotte Program. As the City of Charlotte grows, a core principle for City programming is to create places for live, work, and play accessible to all persons regardless of income level.

Additional Outcomes

In addition to the above outcomes, 83 Households were assisted with HOPWA TBRA, and 199 Households were assisted with HOPWA Homelessness Prevention.

CR-10 - Racial and Ethnic composition of families assisted

Describe the families assisted (including the racial and ethnic status of families assisted).

91.520(a)

Table 2 – Table of assistance to racial and ethnic populations by source of funds

Race:				
CDBG	CDBG	HOME	ESG	HOPWA
White	35	19	973	965
Black or African American	657	89	4285	4247
Asian	0	3	57	56
American Indian or American Native	2	1	80	80
Native Hawaiian or Other Pacific Islander		0	17	14
Total	694	112	5412	5362
Ethnicity:				
Hispanic	17	15	379	0
Not Hispanic	502	502	5377	

Narrative

The table shows the number of beneficiaries who reported race and ethnicity that received assistance from HUD-funded programs during the FY2022-2023.

The table specifically does not include 13 persons who identified as "other" and 62 individuals who did not provide any racial or ethnic data under CDBG. Additionally, 3 persons who identified as "multiple" were not included under HOME, and under ESG, 277 individuals identified as "multiple" and 491 individuals identified as unknown.

CR-15 - Resources and Investments 91.520(a)

Identify the resources made available

Source of Funds	Source	Resources Made Available	Amount Expended During Program Year
CDBG	public - federal	5,626,717	10,435,177
HOME	public - federal	3,529,948	3,944,508
HOPWA	public - federal	3,260,386	2,799,960
ESG	public - federal	509,569	368,085
Other	public - local	0	

Table 3 - Resources Made Available

Narrative

The expended resources listed above indicate the funding drawn in HUDS's integrated and disbursement information system (IDIS). The City has a comprehensive checks and balance system in place to ensure all federal funds are expended according to HUD's federal statutes, regulations and all terms and conditions outlined in the federal award.

Identify the geographic distribution and location of investments

Target Area	Planned Percentage of Allocation	Actual Percentage of Allocation	Narrative Description
City of Charlotte	74		Service Geography
City of Charlotte/ Mecklenburg County	1		Service Geography
HOPWA Designated Service Area	25		Service Geography

Table 4 – Identify the geographic distribution and location of investments

Narrative

N/A

Leveraging

Explain how federal funds leveraged additional resources (private, state and local funds), including a description of how matching requirements were satisfied, as well as how any publicly owned land or property located within the jurisdiction that were used to address the needs identified in the plan.

The City of Charlotte funds a local housing trust to provide leverage funding for affordable housing projects. The City directly matches all HOME funds with the required funding amount at the outset of each project. The City also passed a land disposition policy that reviews all city-owned land prior to disposal for possible use as affordable housing. Several City parcels have been used for affordable housing development.

Fiscal Year Summary – HOME Match	
1. Excess match from prior Federal fiscal year	3,498,023
2. Match contributed during current Federal fiscal year	0
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	3,498,023
4. Match liability for current Federal fiscal year	686,800
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	2,811,223

Table 5 – Fiscal Year Summary - HOME Match Report

Match Contribution for the Federal Fiscal Year								
Project No. or Other ID	Date of Contribution	Cash (non-Federal sources)	Foregone Taxes, Fees, Charges	Appraised Land/Real Property	Required Infrastructure	Site Preparation, Construction Materials, Donated labor	Bond Financing	Total Match

Table 6 – Match Contribution for the Federal Fiscal Year

HOME MBE/WBE report

Program Income – Enter the program amounts for the reporting period				
Balance on hand at beginning of reporting period \$	Amount received during reporting period \$	Total amount expended during reporting period \$	Amount expended for TBRA \$	Balance on hand at end of reporting period \$
0	905,123	905,123	339,118	0

Table 7 – Program Income

CR-20 - Affordable Housing 91.520(b)

Evaluation of the jurisdiction's progress in providing affordable housing, including the number and types of families served, the number of extremely low-income, low-income, moderate-income, and middle-income persons served.

	One-Year Goal	Actual
Number of Homeless households to be provided affordable housing units	2,900	52
Number of Non-Homeless households to be provided affordable housing units	500	246
Number of Special-Needs households to be provided affordable housing units	329	83
Total	3,729	381

Table 8 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	150	135
Number of households supported through The Production of New Units	325	0
Number of households supported through Rehab of Existing Units	175	313
Number of households supported through Acquisition of Existing Units	0	0
Total	650	448

Table 9 – Number of Households Supported

Discuss the difference between goals and outcomes and problems encountered in meeting these goals.

Low housing stock and contractor shortages reduced rental assistance and rehab production. Fewer down payment loans were provided due to rising interest rates and home sale prices.

Discuss how these outcomes will impact future annual action plans.

The focus of Charlotte's federal funding allocations is affordable housing preservation and production. The City uses a combination of policy, federal funding, and local funding to create, preserve and sustain affordable housing options for all residents of Charlotte. While these outcomes indicate positive progress, the affordability and availability of housing for low and moderate-income households will continue to be a major issue for growing cities such as Charlotte.

Include the number of extremely low-income, low-income, and moderate-income persons served by each activity where information on income by family size is required to determine the eligibility of the activity.

Number of Households Served	CDBG Actual	HOME Actual
Extremely Low-income	517	13
Low-income	111	25
Moderate-income	84	77
Total	712	115

Table 10 – Number of Households Served

Narrative Information

The above data excludes information for 60 individuals who did not provide income information for CDBG.

CR-25 - Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c)

Evaluate the jurisdiction's progress in meeting its specific objectives for reducing and ending homelessness through:

Reaching out to homeless persons (especially unsheltered persons) and assessing their individual needs

Addressing the emergency shelter and transitional housing needs of homeless persons

The City partners with three shelters providing services to homeless households. Roof Above (formerly The Men's Shelter of Charlotte) provides emergency shelter to homeless men. The Salvation Army Center of Hope provides shelter to single women and families. Safe Alliance provides shelter to victims of domestic violence and sexual assault.

Along with the emergency shelter organizations, several other non-profit housing partners assist with providing transitional housing. These organizations provide temporary rental assistance through HOME, ESG, and locally-funded programs. Two partner organizations, Supportive Housing Communities and Roof Above (formerly Urban Ministries), develop supportive housing specifically for chronically homeless men and women. There continues to be a considerable need for services directed at ending and preventing homelessness. The City will continue to fund support for shelters and temporary rental assistance with a goal of self-sufficiency, and capital projects that create new housing options for persons experiencing homelessness.

Helping low-income individuals and families avoid becoming homeless, especially extremely low-income individuals and families and those who are: likely to become homeless after being discharged from publicly funded institutions and systems of care (such as health care facilities, mental health facilities, foster care and other youth facilities, and corrections programs and institutions); and, receiving assistance from public or private agencies that address housing, health, social services, employment, education, or youth needs

The City's coordinated assessment process assesses all individuals seeking housing assistance and utilizes a standardized evaluation to direct persons to the most appropriate services. In addition, partner agencies work together to connect services to the individual client's needs. Agencies such as health providers, law enforcement agencies, and more traditional service providers work together to meet specific client needs with a goal of self-sufficiency.

The City of Charlotte, Mecklenburg County, and area service providers implemented a diversion program through coordinated assessment which is targeted to families who are experiencing homelessness for the first time. This diversion program allows case managers working with families to determine if funds could be provided which would allow the families to stay housed at their current locations.

Helping homeless persons (especially chronically homeless individuals and families, families with children, veterans and their families, and unaccompanied youth) make the transition to permanent housing and independent living, including shortening the period of time that individuals and families experience homelessness, facilitating access for homeless individuals and families to affordable housing units, and preventing individuals and families who were recently homeless from becoming homeless again

This year, 152 households accessed one or more City-funded rental assistance programs. This intentional use of funding (both subsidy and case management services) is one of the community's core strategies to ensure successful transitions to self-sufficiency. Both the coordinated assessment and diversion processes play key roles in ensuring clients receive the most appropriate services for their individual needs. The community continues to participate in the Built for Zero Initiative which brings together a coalition of organizations that partner around this work and is succeeding in placing veterans and chronically homeless persons in housing throughout the year.

CR-30 - Public Housing 91.220(h); 91.320(j)

Actions taken to address the needs of public housing

INLIVIAN, formerly the Charlotte Housing Authority (CHA), converted 3,284 Public Housing units to Project Based Voucher (PBV) funding through the Housing and Urban Development (HUD) Rental Assistance Demonstration (RAD) program. INLIVIAN's final public housing site, Dillehay Courts will be redeveloped in two phases. The Gaston at North End, Phase I of the redevelopment of Dillehay Courts Apartments, is complete and encompasses 144 units featuring 1, 2, and 3 bedrooms. Phase I includes 36 PBV vouchers. The second phase will include 100 PBV vouchers, maintaining the same number of subsidized units as the original Public Housing development. Upon completion of the Dillehay Courts redevelopment, INLIVIAN will no longer have a public housing portfolio. Conversion to the RAD PBV platform allowed INLIVIAN to leverage public and private debt and equity to reinvest in the affordable housing stock while ensuring that units remain permanently affordable to low-income households. A key focus in addressing the needs of INLIVIAN's portfolio for 2023 and 2024, is for INLIVIAN to continue to act as a resource and community ally for INLIVIAN clientele residing in Dillehay, and the adjacent neighborhood community through the redevelopment phases.

Actions taken to encourage public housing residents to become more involved in management and participate in homeownership

INLIVIAN has dedicated staff within its non-profit supportive services entity, CORE Programs, that works with an increasingly active Resident Advisory Council (RAC) to recruit, empower and assure residents are active in agency decision making and community leadership prospects. Resident Advisory Council leaders meet monthly with INLIVIAN's CEO and property management staff to discuss new ideas, plans, and/or community concerns.

In 2016 INLIVIAN launched its homeownership program, Destination Homeownership. The program empowers and assists qualified Housing Choice Voucher and Rental Assistance Demonstration (RAD)-Project Based Voucher (PBV) participants who are first-time buyers, in the purchase of their version of the American Dream.

A total of 179 families have purchased a home as of October 2023. Although the rising cost of homes in the Charlotte market has created challenges assisting low-income families with homeownership opportunities, the Destination Homeownership program has been able to assist 5 families with the purchase of a home so far in 2023. The homes that families were able to purchase included pre-existing and new-construction single-family homes, and townhomes. Destination Homeownership families are empowered through homeownership education and counseling and educational programming that includes workshops, individual counseling sessions, and credit, and debt reduction services.

Actions taken to provide assistance to troubled PHAs

N/A

CR-35 - Other Actions 91.220(j)-(k); 91.320(i)-(j)

Actions taken to remove or ameliorate the negative effects of public policies that serve as barriers to affordable housing such as land use controls, tax policies affecting land, zoning ordinances, building codes, fees and charges, growth limitations, and policies affecting the return on residential investment. 91.220 (j); 91.320 (i)

The City has adopted a progressive set of codes and ordinances that broadly allow housing throughout the City and provides voluntary incentives for the provision of a mix of housing for households with diverse income. City policies also ensure projects funded by the city are not concentrated in areas with high levels of existing multifamily units. The City actively markets the shortage of and need for housing affordable to households at or below 80% of the area median income. Following the adoption of the updated Comprehensive Plan, in March 2022, Charlotte adopted the Charlotte Future 2040 Policy Map, replacing the currently used Land Use Tool. In August 2022, Charlotte also established a Unified Development Ordinance (UDO). The purpose and intent of this UDO was to provide a diversity of housing choices for all income levels and groups with an emphasis on affordability, assign zoning districts to land within the City and the extra-territorial jurisdiction according to use of land and structures, mass and height of structures, intensity of the use of the lot, or other classification, as deemed best suited to carry out the purposes of this Ordinance, and other activities needed within the City.

To lessen barriers to affordable housing the City continues to support nonprofit housing agencies, encourage creative partnerships, and provide funding to support diverse housing options in the Charlotte Mecklenburg community. This year the City of Charlotte provided funding for tenant-based rental assistance, gap financing for multifamily housing construction, and funding for multifamily rehabilitation. The City also has a voluntary density bonus program to encourage mixed-income developments through the provision of higher-density developments.

Actions taken to address obstacles to meeting underserved needs. 91.220(k); 91.320(j)

Underserved needs are identified as limited housing units available for low and very low-income households, limited housing for persons with special needs, and lack of funding to quickly rehouse homeless individuals and households. To address these obstacles, the City: 1) provided gap funding for housing developments that will serve low and very low-income households, 2) participated in the development of housing for persons with HIV and formerly homeless and 3) provided housing subsidies designed to quickly rehouse households experiencing a housing crisis such as homelessness.

Actions taken to reduce lead-based paint hazards. 91.220(k); 91.320(j)

The City of Charlotte is a recipient of the Lead Hazard Reduction grant from the Office of Lead Hazard Control and Healthy Homes. The City conducts outreach campaigns to increase community awareness of the dangers of Lead-Based Paint. The Lead program tests and mitigates lead hazards in affected

qualifying units. All City housing rehabilitation units built before 1978 are assessed for lead-based paint. If lead is identified in qualifying rehabilitation units, it is controlled or abated.

Actions taken to reduce the number of poverty-level families. 91.220(k); 91.320(j)

The City of Charlotte and Mecklenburg County employ various strategies and initiatives to improve economic opportunity for low-wealth residents. Most of these efforts are integrated into the goals, programs and policies of the City of Charlotte Housing & Neighborhood Services, the Mecklenburg County Department of Social Services, and INLIVIAN, formerly the Charlotte Housing Authority (CHA). This year, these strategies included:

- Mecklenburg County's Work First Program to help lift households receiving public assistance out of their poverty circumstances and into full-time employment.
- Inlivan's Family Self-Sufficiency Program provides remedial education, counseling, job training referral, and placement to public housing residents.
- Local Job-Link system that provides access to training and jobs.
- Mayor's Mentoring Alliance connects Charlotte mentoring organizations for the purpose of promoting best practices through providing workshops, resources, and standards for quality service delivery.
- Mayor's Youth Employment Program provides summer employment opportunities for disadvantaged youth that expose them to the world of work.
- The City, County, private businesses, and nonprofit organizations joined together to develop the 2020-2025 Housing and Homelessness Strategy. This effort facilitates the public and private sector coming together to address the full housing continuum, from street homelessness, upstream to households experiencing cost-burden.

Actions taken to develop institutional structure. 91.220(k); 91.320(j)

Charlotte Mecklenburg uses a robust delivery system providing services from emergency shelters to first-time homeownership. This year, the City worked with a number of local nonprofit housing agencies that provide programs and services on behalf of the City. The City actively participates in the Charlotte-Mecklenburg Continuum of Care and City staff serve on the COC board. This group coordinates efforts to reduce and end area homelessness and provides a continuum of services to low-income households.. INLIVIAN, formerly the Charlotte Housing Authority (CHA) is responsible for all public housing developments in Charlotte Mecklenburg and is also the responsible entity for the Housing Choice Voucher Program. DreamKey Partners, formerly The Charlotte Mecklenburg Housing Partnership, is a Community Development Business Organization that works closely with the City on several projects. The City will continue to rely on these partnerships to implement HUD-funded housing and community development programs. The City participates in various advisory boards and coalitions that provide continuous feedback on the City's delivery systems and offer suggestions on how to better streamline program delivery and project implementation.

Actions taken to enhance coordination between public and private housing and social service agencies. 91.220(k); 91.320(j)

The City fostered coordination through its participation as an active member in the Charlotte Mecklenburg Continuum of Care (CoC). The City actively participated with the CoC and City staff served on the CoC Board. The City and many local nonprofit organizations serving homeless individuals continued to work through the Homeless Services Network to coordinate service delivery for families with critical needs related to homelessness.

Identify actions taken to overcome the effects of any impediments identified in the jurisdictions analysis of impediments to fair housing choice. 91.520(a)

The City of Charlotte has established programs and resources to mitigate barriers to fair housing choice. The Charlotte Community Relations Committee focused on preventing discrimination in Charlotte-Mecklenburg. The Committee accepts formal complaints from any party who feels discriminated against in a public place or in housing because of their race, color, religion, national origin, gender, family status, or disability. The Committee also provides fair housing education and outreach services. Charlotte conducts yearly tests of multifamily housing complexes for fair housing compliance.

CR-40 - Monitoring 91.220 and 91.230

Describe the standards and procedures used to monitor activities carried out in furtherance of the plan and used to ensure long-term compliance with requirements of the programs involved, including minority business outreach and the comprehensive planning requirements

The City uses a multi-layered approach to ensure that housing strategy, short and long-term goals, program-specific regulations, and general state and federal statutes are followed. The planning process involves creating draft documents that are reviewed internally, reviewed by elected officials, and published for comment. Several public forums are conducted to explain the content and use of the plan document. The City Council approves all plans by vote.

Activities are designed to achieve the outcomes set forth in the plan and are conducted using multiple delivery methods such as City staff, sub-recipients, contractors, or other third parties such as land owners or developers. Staff follows federal, state, and local guidelines related to the selection of parties who may use federal dollars. Several City staff persons are assigned to monitor activities for compliance including contract monitors, a multifamily project manager, asset management, and a compliance team.

Responsible parties regularly report the status of each activity to ensure plan goals will be completed. At the end of each year, accomplishments are compared to goals to determine the status of planned activities and make any necessary adjustments to future activities. The City of Charlotte also monitors Davis Bacon, Section 3, Environmental and State Historic Preservation Office compliance to ensure projects comply with all applicable crosscutting requirements.

Citizen Participation Plan 91.105(d); 91.115(d)

Describe the efforts to provide citizens with reasonable notice and an opportunity to comment on performance reports.

The City of Charlotte published notices in local English and Spanish newspapers requesting feedback on the CAPER document. To ensure access, A Draft version of the CAPER was made available September 11, 2023- September 26, 2023 available at City of Charlotte government offices and online at <https://www.charlottenc.gov/Streets-and-Neighborhoods/Housing>.

No comments were received during the 15-day comment period

CR-45 - CDBG 91.520(c)

Specify the nature of, and reasons for, any changes in the jurisdiction’s program objectives and indications of how the jurisdiction would change its programs as a result of its experiences.

The City's CDBG-funded programs were conducted as specified in the 2022-2023 Action Plan. The programs achieved their intended outcomes.

Does this Jurisdiction have any open Brownfields Economic Development Initiative (BEDI) grants?

No

[BEDI grantees] Describe accomplishments and program outcomes during the last year.

CR-50 - HOME 24 CFR 91.520(d)

Include the results of on-site inspections of affordable rental housing assisted under the program to determine compliance with housing codes and other applicable regulations

Please list those projects that should have been inspected on-site this program year based upon the schedule in 24 CFR §92.504(d). Indicate which of these were inspected and a summary of issues that were detected during the inspection. For those that were not inspected, please indicate the reason and how you will remedy the situation.

HUD regulations require annual compliance monitoring and on-site inspections for rental housing developments consisting of 26 or more units to be inspected annually, inspections every two years for developments of 5-25 units and every three years for developments of 1-4 units.

Arbor Glen III	LaSalle Street Duplexes
Bradford Apartments	McNeel Apartments
Cherry Garden Apartments	Montgomery Gardens
Fairmarket Square Apartments	Nia Point
Friendship Gardens	Springfield Gardens
Grant Station	St. Andrews Homes
Honeycreek Senior Apartments	The Stevenson @ Brightwalk
LaSalle at Lincoln Heights	Tyvola Crossings II
	Wilmore Apartment

Year-end monitoring activities included approval of tenant rent increases, review of rent rates, income limits and utility schedules, unit mix, lease protections, property inspections, review of maintenance plans, random tenant file reviews for income verification, tenant re-certification, and accurate rent calculations. No questionable findings were revealed during the review of tenant files. The overall units and grounds were satisfactorily maintained and inspected. The City's inspections resulted in sending letters to property owners regarding minor necessary repairs. All repairs and recommendations were satisfactorily completed meeting all federal requirements.

Provide an assessment of the jurisdiction's affirmative marketing actions for HOME units. 24 CFR 91.520(e) and 24 CFR 92.351(a)

The City of Charlotte uses HOME funding in two ways that facilitate affirmative marketing practices. The City's down payment assistance program provides funding for the purchase of market-rate units and uses HOME funding to increase affordability and funding access through down payment and closing cost assistance. The City of Charlotte and its partner, Dreamkey Partners formerly, the Charlotte Mecklenburg Housing Partnership, provide outreach and training to real estate agents and first loan providers to ensure the program is widely utilized. Outreach to lenders is focused on lending organizations that have community-based loan programs often accessed by minority homebuyers.

HOME funds is also used by nonprofit partners to develop various types of affordable housing products. The City requests each partner to develop and implement an affirmative marketing plan related to their project to ensure equal access to the developed housing resource.

Refer to IDIS reports to describe the amount and use of program income for projects, including the number of projects and owner and tenant characteristics

The City of Charlotte received and expended **\$905,122.68** in program income during the project year.

Program Income was spent on Down Payment Assistance and Tenant Based Rental Activities

**Describe other actions taken to foster and maintain affordable housing. 24 CFR 91.220(k)
(STATES ONLY: Including the coordination of LIHTC with the development of affordable
housing). 24 CFR 91.320(j)**

The City of Charlotte works as a collaborative partner with nonprofit organizations as well as the State and Federal government to promote and increase diverse housing options within the City. In addition to the investment of Federal funds in affordable housing development and preservation, the City operates a Housing Trust Fund. This funding source has provided over \$222 million in housing investments in Charlotte acting as a major gap financing instrument for tax credit housing and a primary funding source for millions in supportive housing investment.

Along with the City's financial commitment, the City Council continues to direct staff to implement affordable housing best practices. One area currently under review is City surplus property and what role these physical assets might play in the provision of additional affordable housing units.

CR-55 - HOPWA 91.520(e)

Identify the number of individuals assisted and the types of assistance provided

Table for report on the one-year goals for the number of households provided housing through the use of HOPWA activities for: short-term rent, mortgage, and utility assistance payments to prevent homelessness of the individual or family; tenant-based rental assistance; and units provided in housing facilities developed, leased, or operated with HOPWA funds.

Number of Households Served Through:	One-year Goal	Actual
Short-term rent, mortgage, and utility assistance to prevent homelessness of the individual or family	225	199
Tenant-based rental assistance	110	83
Units provided in permanent housing facilities developed, leased, or operated with HOPWA funds	17	18
Units provided in transitional short-term housing facilities developed, leased, or operated with HOPWA funds	0	0

Table 11 – HOPWA Number of Households Served

Narrative

In February 2023, the City of Charlotte hired a new HOPWA Engagement Coordinator onboard. The primary focus of this role is to work closely with the existing HOPWA project sponsor and service providers to expand the range of providers available in the eleven (11) county service area

CR-58 – Section 3

Identify the number of individuals assisted and the types of assistance provided

Total Labor Hours	CDBG	HOME	ESG	HOPWA	HTF
Total Number of Activities	0	0	0	0	0
Total Labor Hours	9,282	0	0	0	
Total Section 3 Worker Hours	0	0	0	0	
Total Targeted Section 3 Worker Hours	0	0	0		

Table 12 – Total Labor Hours

Qualitative Efforts - Number of Activities by Program	CDBG	HOME	ESG	HOPWA	HTF
Outreach efforts to generate job applicants who are Public Housing Targeted Workers					
Outreach efforts to generate job applicants who are Other Funding Targeted Workers.					
Direct, on-the job training (including apprenticeships).					
Indirect training such as arranging for, contracting for, or paying tuition for, off-site training.					
Technical assistance to help Section 3 workers compete for jobs (e.g., resume assistance, coaching).					
Outreach efforts to identify and secure bids from Section 3 business concerns.					
Technical assistance to help Section 3 business concerns understand and bid on contracts.	1				
Division of contracts into smaller jobs to facilitate participation by Section 3 business concerns.					
Provided or connected residents with assistance in seeking employment including: drafting resumes, preparing for interviews, finding job opportunities, connecting residents to job placement services.	1				
Held one or more job fairs.					
Provided or connected residents with supportive services that can provide direct services or referrals.	1				
Provided or connected residents with supportive services that provide one or more of the following: work readiness health screenings, interview clothing, uniforms, test fees, transportation.					
Assisted residents with finding child care.					
Assisted residents to apply for, or attend community college or a four year educational institution.					
Assisted residents to apply for, or attend vocational/technical training.					
Assisted residents to obtain financial literacy training and/or coaching.	1				
Bonding assistance, guaranties, or other efforts to support viable bids from Section 3 business concerns.					
Provided or connected residents with training on computer use or online technologies.					
Promoting the use of a business registry designed to create opportunities for disadvantaged and small businesses.					

Outreach, engagement, or referrals with the state one-stop system, as designed in Section 121(e)(2) of the Workforce Innovation and Opportunity Act.					
Other.	2				

Table 13 – Qualitative Efforts - Number of Activities by Program

Narrative

Dreamkey Partners sent compliance packets to all its general contractors advising of the federal Section 3 program and its applicability to the funds being used to support their contracts that included federal funding.

Habitat Charlotte Region is committed to incorporating training and job opportunities for local low-income residents into our affiliate activities. This is accomplished through making bidding materials available and easily accessible, attending project outreach/information sessions to network with potential subcontractors, and reviewing subcontractor needs and solutions to assist them in participating in projects. Open positions are advertised in these locations: The Habitat Charlotte Region career opportunities newsletter, Habitat Charlotte Region website, Queen City Metro, La Noticia, and Diversity Newsletter all post open positions.

CR-60 - ESG 91.520(g) (ESG Recipients only)

ESG Supplement to the CAPER in *e-snaps*

For Paperwork Reduction Act

1. Recipient Information—All Recipients Complete

Basic Grant Information

Recipient Name	Charlotte
Organizational DUNS Number	071064166
UEI	
EIN/TIN Number	521333483
Identify the Field Office	GREENSBORO
Identify CoC(s) in which the recipient or subrecipient(s) will provide ESG assistance	Charlotte/Mecklenburg County CoC

ESG Contact Name

Prefix	Mr
First Name	Marcus
Middle Name	D
Last Name	Jones
Suffix	
Title	City Manager

ESG Contact Address

Street Address 1	600 E. Trade Street
Street Address 2	
City	Charlotte
State	NC
ZIP Code	-
Phone Number	7043362241
Extension	
Fax Number	
Email Address	marcus.jones@charlotte.gov

ESG Secondary Contact

Prefix	Mr
First Name	Warren
Last Name	Wooten
Suffix	
Title	HNS Assistant Director Housing
Phone Number	7043362489
Extension	
Email Address	warren.wooten@charlottenc.gov

2. Reporting Period—All Recipients Complete

Program Year Start Date 07/01/2022
Program Year End Date 06/30/2023

3a. Subrecipient Form – Complete one form for each subrecipient

Subrecipient or Contractor Name: SALVATION ARMY CHARLOTTE

City: Charlotte

State: NC

Zip Code: 28231, 1128

DUNS Number: 828098058

UEI:

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 159800

Subrecipient or Contractor Name: Safe Alliance

City: Charlotte

State: NC

Zip Code: 28202, 3095

DUNS Number: 113346134

UEI:

Is subrecipient a victim services provider: Y

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 55000

Subrecipient or Contractor Name: Supportive Housing Communities

City: Charlotte

State: NC

Zip Code: 28205, 1828

DUNS Number: 883981144

UEI:

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 39786

Subrecipient or Contractor Name: Roof Above

City: Charlotte

State: NC

Zip Code: 28206, 3200

DUNS Number: 957263866

UEI:

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 144545

Subrecipient or Contractor Name: Friendship Community Development Corp

City: Charlotte

State: NC

Zip Code: 28216, 3735

DUNS Number: 360714492

UEI:

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 15000

Subrecipient or Contractor Name: The Relatives, Inc

City: Charlotte

State: NC

Zip Code: 28202, 2223

DUNS Number: 097361141

UEI: P8NTG8M8Y5E5

Is subrecipient a victim services provider: N

Subrecipient Organization Type: Other Non-Profit Organization

ESG Subgrant or Contract Award Amount: 86268