

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



**FY 2023-Draft**

# Table Contents

CR-05 - Goals and Outcomes.....	3
CR-10 - Racial and Ethnic composition of families assisted .....	11
CR-15 - Resources and Investments 91.520(a) .....	13
CR-20 - Affordable Housing 91.520(b) .....	16
CR-25 - Homeless and Other Special Needs 91.220(d, e); 91.320(d, e); 91.520(c) .....	18
CR-30 - Public Housing 91.220(h); 91.320(j) .....	20
CR-35 - Other Actions 91.220(j)-(k); 91.320(i)-(j).....	22
CR-40 - Monitoring 91.220 and 91.230.....	25
CR-45 - CDBG 91.520(c).....	26
CR-50 - HOME 24 CFR 91.520(d).....	27
CR-55 - HOPWA 91.520(e).....	29
CR-58 – Section 3.....	30
CR-60 - ESG 91.520(g) (ESG Recipients only) .....	32
CR-65 - Persons Assisted .....	35
CR-70 – ESG 91.520(g) - Assistance Provided and Outcomes.....	36

## CR-05 - Goals and Outcomes

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

### **91.520(a)**

This could be an overview that includes major initiatives and highlights that were proposed and executed throughout the program year.

The CAPER covers the period from July 1, 2023, to June 30, 2024, and describes the results and benefits produced by the City of Charlotte as projected by the City's FY2023-2024 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 FY2023, the City of Charlotte and its partners implemented several housing and community development activities in the Charlotte community. The following reflects a portion of the City's achievements in FY2023:

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

**129** households received down-payment assistance to purchase a home.

**4,460** 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%	100	0	0.00%
Improve existing affordable housing stock	Affordable Housing	CDBG: \$ / HOME: \$	Homeowner Housing Rehabilitated	Household Housing Unit	625	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%			
Increase neighborhood sustainability	Affordable Housing Non-Housing Community Development	CDBG: \$ / HOME: \$	Public service activities other than Low/Moderate Income Housing Benefit	Persons Assisted	1250	0	0.00%	50	223	446.00%
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	118	236.00%	50	0	0.00%

Increase neighborhood sustainability	Affordable Housing Non-Housing Community Development	CDBG: \$ / HOME: \$	Homeowner Housing Rehabilitated	Household Housing Unit	250	0	0.00%	8	226	2,825.00%
Increase neighborhood sustainability	Affordable Housing Non-Housing Community Development	CDBG: \$ / HOME: \$	Other	Other	200	0	0.00%			
Increase the supply of affordable rental housing	Affordable Housing	CDBG: \$1300000	Rental units constructed	Household Housing Unit	0	0		12	0	0.00%
Increase the supply of affordable rental housing	Affordable Housing	CDBG: \$1300000	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	41	4.10%	85	41	0.00%
Provide assistance to households in crisis	Affordable Housing Homeless	ESG: \$	Homeless Person Overnight Shelter	Persons Assisted	12500	5519	44.15%	2700	5519	0.00%
Provide assistance to households in crisis	Affordable Housing Homeless	ESG: \$	Homelessness Prevention	Persons Assisted	1000	38	3.80%	100	38	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	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	HOME: \$ / Local: \$	Homeowner Housing Added	Household Housing Unit	1625	0	0.00%	300	129	0.00%

Provide opportunities for homeownership	Affordable Housing	HOME: \$ / Local: \$	Direct Financial Assistance to Homebuyers	Households Assisted	0	0		125	11	8.80%
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	80		348	80	0.00%
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	114	22.80%	110	114	0.00%
Provide programs to support persons with HIV/AIDS	Affordable Housing Homeless Non-Homeless Special Needs	HOPWA: \$	Homelessness Prevention	Persons Assisted	300	233	77.67%	225	233	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	0	0.00%		33	
Provide temporary rental assistance		HOME: \$	Tenant-based rental assistance / Rapid Rehousing	Households Assisted	250	41	16.40%	60	29	0.00%

**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 FY2023 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.

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## 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)

Describe the clients assisted (including the racial and/or ethnicity of clients assisted with ESG)

	HESG
American Indian, Alaska Native, or Indigenous	55
Asian or Asian American	23
Black, African American, or African	4,067
Hispanic/Latina/e/o	269
Middle Eastern or North African	6
Native Hawaiian or Pacific Islander	8
White	779
Multiracial	390
Client doesn't know	0
Client prefers not to answer	12
Data not collected	0
<b>Total</b>	<b>5,609</b>

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

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

<b>Race:</b>		
	<b>CDBG</b>	<b>HOME</b>
<b>CDBG</b>		
White	46	27
Black or African American	530	124
Asian	1	0
American Indian or American Native	1	0
Native Hawaiian or Other Pacific Islander	0	0
<b>Total</b>	<b>588</b>	<b>151</b>
<b>Ethnicity:</b>		
Hispanic	40	4
Not Hispanic	576	148

## **Narrative**

Effective Oct 2023, Race and Ethnicity were captured as joint data elements for ESG in the Homeless Management System (HMIS), the requirement reporting system making it to report Race and Ethnicity in the same manner as CDBG, HOME, and HOPWA. See the uploaded ESG SAGE report for The Racial and Ethnic composition of persons assisted with ESG funds. The Racial and Ethnic composition of families assisted with HOPWA funds can be located in the HOPWA CAPER submitted separately.

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## 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	5,618,194	8,569,825
HOME	public - federal	3,463,178	3,871,125
HOPWA	public - federal	3,666,683	2,412,078
ESG	public - federal	494,529	623,646
Other	public - local		

**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 before disposal for possible use as affordable housing. Several City parcels have been used for affordable housing development.

<b>Fiscal Year Summary – HOME Match</b>	
1. Excess match from prior Federal fiscal year	2,811,222.88
2. Match contributed during current Federal fiscal year	0
3. Total match available for current Federal fiscal year (Line 1 plus Line 2)	2,811,222.88
4. Match liability for current Federal fiscal year	168,829.73
5. Excess match carried over to next Federal fiscal year (Line 3 minus Line 4)	2,642,393.15

**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	761,405	761,405	359,220	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	41
Number of Non-Homeless households to be provided affordable housing units	500	0
Number of Special-Needs households to be provided affordable housing units	329	114
<b>Total</b>	<b>3,729</b>	<b>155</b>

Table 8 – Number of Households

	One-Year Goal	Actual
Number of households supported through Rental Assistance	150	184
Number of households supported through The Production of New Units	325	0
Number of households supported through Rehab of Existing Units	175	0
Number of households supported through Acquisition of Existing Units	0	0
<b>Total</b>	<b>650</b>	<b>184</b>

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.**

<b>Number of Households Served</b>	<b>CDBG Actual</b>	<b>HOME Actual</b>
Extremely Low-income	407	31
Low-income	153	33
Moderate-income	56	88
<b>Total</b>	<b>616</b>	<b>152</b>

**Table 10 – Number of Households Served**

**Narrative Information**

The above data excludes information for 25 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**

Charlotte-Mecklenburg utilizes a Coordinated Entry process to engage all persons who are homeless or at risk of homelessness to assess housing needs and connect with available resources in the community. The City, County, and local funds also be used to expand Street Outreach activities to locate and engage unsheltered persons to connect with shelter options and and move directly into housing, if available.

### **Addressing the emergency shelter and transitional housing needs of homeless persons**

The City partners with three shelters providing services to homeless households. Roof Above 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 provide transitional housing with wrap around services. Multiple organizations offer short and medium-term financial assistance and/or supportive service through HOME, ESG, and locally-funded programs. Roof Above continues to 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. Efforts are being directed at Street Outreach activities to engage unsheltered individuals and local initiatives. The city will continue to fund support for shelters, street outreach, short-medium term financial 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 Entry process assesses all individuals who are homeless or at risk of homelessness 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. In addition to Coordination Entry staff, providers serving special populations can also complete assessments including Youth, Veterans, and Persons fleeing domestic violence, dating violence, sexual assault, and stalking. 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. Shelter providers utilize diversion programs targeting households who are experiencing homelessness for the first time. Through the Charlotte-Mecklenburg A Home For All Strategic Framework, the community is working to reorient service provision around people's progress on the housing continuum from homelessness and housing insecurity to housing stability including centralized information regarding available services and remaining supportive and present for people as they move along the housing continuum.

**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, 184 households accessed one or more City-funded short and medium term financial assistance programs. This intentional use of funding (both financial assistance and case management services) is one of the community's core strategies to housing stability. Street outreach, coordinated entry 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 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 180 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 6 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

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## **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 receives a Lead Hazard grant from the Office of Lead Hazard Control and Healthy Homes. To enhance community awareness of the risks associated with Lead-Based Paint, the City conducts outreach campaigns. Under the Lead Program, all housing rehabilitation projects built before

1978 are evaluated for lead-based paint. If lead is identified, it is either controlled or abated as necessary.

### **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.
- A Home For All Initiative, A community-wide effort to address homelessness and housing instability in Charlotte-Mecklenburg.

### **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(COC) 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 in the Charlotte Mecklenburg Continuum of Care (CoC), as well as, City staff serving 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, at risk of homelessness and special needs. City Staff is also serving in the A Way Home Initiative Pillar workgroups.

**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 discrimination when they are renting, buying, or securing financing for any housing. The prohibitions specifically cover discrimination because of race, color, religion, national origin, gender, familial 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**

## **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 on September 06, 2024 in the local English and Spanish newspapers requesting feedback on the CAPER document. To ensure access, A Draft version of the CAPER will made available September 09, 2024- September 23, 2024 available at City of Charlotte government offices and online at <https://www.charlottenc.gov/Streets-and-Neighborhoods/Housing>.

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**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 2023-2024 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.**

DRAFT

## 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.

Project Name	Developer	Fund Type	# of Units	Date Inspected	Result
Arbor Glen III	Crosland Southeast	HOME	23	5/18/2024	Pending
Bradford Apartments	2132 McClintock Rd LLC	HOME	44	12/18/2023	Compliant
Cheery Garden Apartments	Mosaic Development Group	HOME	42	Last inspection 3/15/2023	Compliant
Fairmarket Square Apartments	Horizon Development		60	2/4/2024	Pending
Friendship Garden	Friendship Baptist Church	HOME	12	12/17/2023	Compliant
Grant Station	Regional Housing Partnership	HOME	12	4/13/2024	Compliant
Honeycreek Senior Apartments	Centrum-Honeycreek Limited Partnership	HOME	78	2/3/2024	Compliant
LaSalle at Lincoln Heights	LaSalle at Lincoln Heights Seniors	HOME	60	12/21/2023	Compliant
LaSalle Street Duplexes	Chinwalla Holding LLC	HOME	8	5/14/2024	Compliant
McNeel Apartments	DreamKey Partners, INC	HOME	48	5/18/2024	Compliant
Montgomery Gardens	Horizon Development	HOME	76	2/17/2024	Non-Compliant
Nia Point	Horizon Development	HOME	81	6/8/2024	Pending
Springfield Gardens	Horizon Development	HOME	86	2/3/2024	Pending
St. Andrews Homes	St. Andrews Homes Limited Partnership	HOME	34	11/30/2024	Compliant
The Stevenson @ Brightwalk	DreamKey Partners, INC	HOME	130	4/6/2024	Compliant
Tyvola Crossing II	DreamKey Partners, INC	HOME	20	7/6/2024	Compliant
Wilmore Apartments	Wilmore Community Association	HOME	4		Affordability Expired

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 led to letters being sent to property owners, addressing the need for minor repairs and non-compliance due to failure to submit required documentation.. 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, 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 are 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 \$761,404.50 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 \$274million 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.

<b>Number of Households Served Through:</b>	<b>One-year Goal</b>	<b>Actual</b>
Short-term rent, mortgage, and utility assistance to prevent homelessness of the individual or family	250	233
Tenant-based rental assistance	120	114
Units provided in permanent housing facilities developed, leased, or operated with HOPWA funds	17	33
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

N/A

### CR-58 – Section 3

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

<b>Total Labor Hours</b>	<b>CDBG</b>	<b>HOME</b>	<b>ESG</b>	<b>HOPWA</b>	<b>HTF</b>
Total Number of Activities	4	0	0	0	0
Total Labor Hours	0				
Total Section 3 Worker Hours					
Total Targeted Section 3 Worker Hours					

**Table 12 – Total Labor Hours**

<b>Qualitative Efforts - Number of Activities by Program</b>	<b>CDBG</b>	<b>HOME</b>	<b>ESG</b>	<b>HOPWA</b>	<b>HTF</b>
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.					
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.	2				
Held one or more job fairs.					
Provided or connected residents with supportive services that can provide direct services or referrals.	2				
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.	2				
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.					

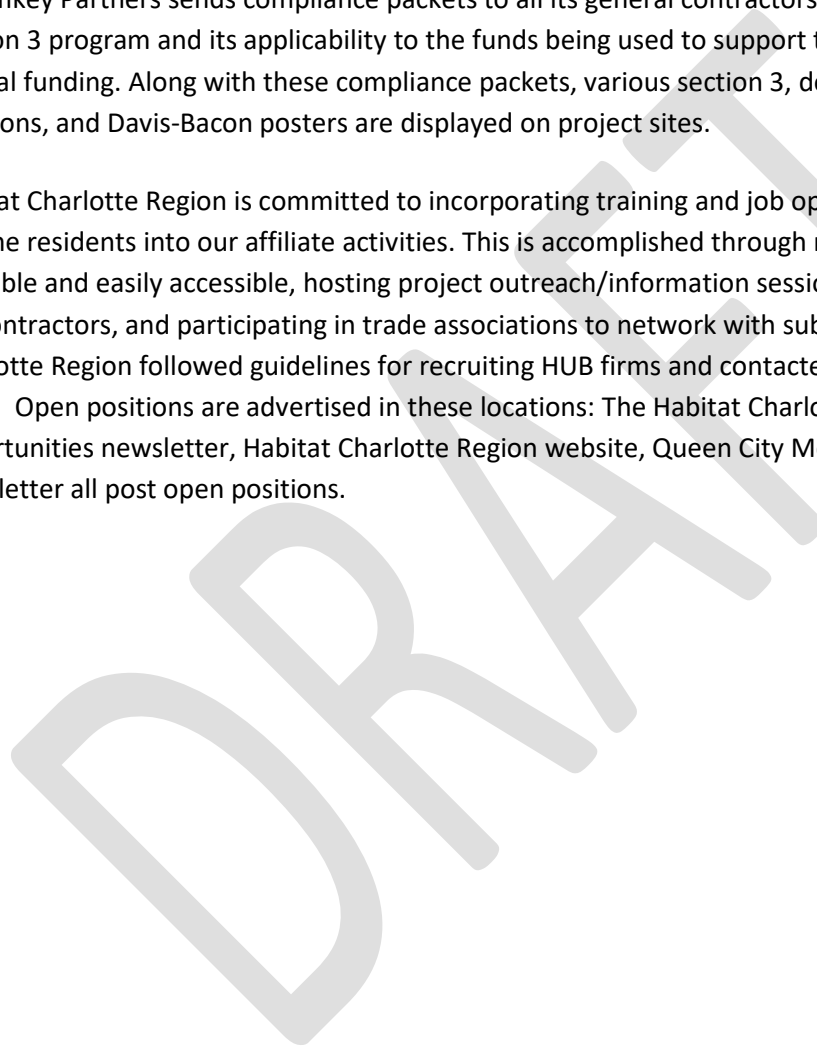
Outreach, engagement, or referrals with the state one-stop system, as designed in Section 121(e)(2) of the Workforce Innovation and Opportunity Act.					
Other.	2				

**Table 13 – Qualitative Efforts - Number of Activities by Program**

**Narrative**

Dreamkey Partners sends 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 include federal funding. Along with these compliance packets, various section 3, debarred search results, wage decisions, and Davis-Bacon posters are displayed on project sites.

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, hosting project outreach/information sessions to network with potential subcontractors, and participating in trade associations to network with subcontractors. Habitat Charlotte Region followed guidelines for recruiting HUB firms and contacted specific firms to invite them to bid. 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**

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

**ESG Contact Name**

<b>Prefix</b>	Mr
<b>First Name</b>	Marcus
<b>Middle Name</b>	D
<b>Last Name</b>	Jones
<b>Suffix</b>	
<b>Title</b>	City Manager

**ESG Contact Address**

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

**ESG Secondary Contact**

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



## 2. Reporting Period—All Recipients Complete

**Program Year Start Date** 07/01/2023  
**Program Year End Date** 06/30/2024

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

**Subrecipient or Contractor Name:** COMMUNITY LINK

**City:** Charlotte

**State:** NC

**Zip Code:** 28202, 3031

**DUNS Number:** 162945059

**UEI:**

**Is subrecipient a victim services provider:** N

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** 108404

**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:** 100059

**Subrecipient or Contractor Name:** Safe Alliance

**City:** Charlotte

**State:** NC

**Zip Code:** 28202, 3095

**DUNS Number:** 113346134

**UEI:**

**Is subrecipient a victim services provider:** N

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** 45853

**Subrecipient or Contractor Name:** Relatives

**City:** Charlotte

**State:** NC

**Zip Code:** 28202, 2223

**DUNS Number:** 097361141

**UEI:**

**Is subrecipient a victim services provider:** N

**Subrecipient Organization Type:** Other Non-Profit Organization

**ESG Subgrant or Contract Award Amount:** 59254

**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:** 16364

**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:** 131652

**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:** 12942

**CR-65 - Persons Assisted**

**See Sage Report**

DRAFT

## CR-70 – ESG 91.520(g) - Assistance Provided and Outcomes

### 8. Shelter Utilization

Number of New Units - Rehabbed	0
Number of New Units - Conversion	0
Total Number of bed-nights available	970
Total Number of bed-nights provided	358,402
Capacity Utilization	87.67%

Table 14 – Shelter Capacity

### 9. Project Outcomes Data measured under the performance standards developed in consultation with the CoC(s)

The City consults with the Charlotte-Mecklenburg CoC to utilize performance standards for project outcomes data. This data is used during our funding review process to determine funding each year. Data outcomes reviewed include but are not limited to, the number of shelter beds available, bed utilizations, HMIS data quality, length of stay in the shelter, and exit destinations.