



North & East Lubbock
Community Development Corporation
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**Board of
Directors**

November 4, 2016 (final revision date)

Cosby Morton
Chairperson

Cheryl Brock
Executive Director of Budget
P.O. Box 2000
Lubbock, TX 79457

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Valorie Duvall
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Ms. Brock:

Rosalind Priestley
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The following, NELCDC Quarter 4, year-end report is comprised of:

Monique Coleman
Executive Director

- **Performance Measures Report.** All Quarter 1 – Quarter 4 performance measure outcomes are described in a chart or written format.
- **Financial Reports.** The financial reports included are:
 - The NELCDC Profit & Loss (P&L) Statement (July 2016 – September 2016) with the Budget far right for a budget vs. actual review; and
 - The NELCDC Balance Sheet (July 2016 – September 2016).

Sheryl Baker

Mary Beckham

Gilbert Flores

Sonny Garza

Vernita Holmes

Subodh Patel

Robert Ramirez

Note: the NELCDC's FY 15-16 budget request of \$363,547 was approved by the Lubbock City Council on July 28, 2016. Half of the total budget was deposited into the NELCDC's city grant fund account on August 1. The second half of the funds will be disbursed and deposited on September 1. Since the transaction took place in the 4th quarter of this fiscal year, the deposits are reflected on the balance sheet.

Matt Stephens

Please let me know if you have questions or concerns or if additional information is needed.

Vacancy

Vacancy

Vacancy

Regards,

Monique Coleman, MPA, MCRP
Executive Director
North & East Lubbock CDC

**Advisory
Members**

W. David Haynes

Greg Jones

David Langston

Mario Ybarra

PERFORMANCE MEASURES REPORT

Volunteer Administration Program

Goal: 8 New Ambassadors

The NELCDC's new volunteer program, which touts new ambassadors has increased the NELCDC's outreach efforts. **The NELCDC gained 21 new ambassadors** in the FY 15-16 fiscal year! These ambassadors assisted the NELCDC with community cleanups and financial literacy outreach. These 21 ambassadors do not include the six Texas Tech MPA students who served as hospitality volunteers for the 2016 Community Champions Awards Luncheon (pictured below). Note, the young lady on the far left is the NELCDC's administrative intern who is also an MPA-JD student at Texas Tech. Also note the many volunteers who served the community for the Adopt-a-Spot program volunteers via Habitat for Humanity, an Adopt-a-Spot program partner.



Referral Partner's Program

Goal: 5 New Referral Partners

The NELCDC's referral partners program is barely one-year old (September 2016). Last year, the NELCDC gained the support of Prime West, Texas Tech Credit Union, and First United Bank who helped facilitate financial literacy workshops. This fall, with new staff the program was reinvigorated and between a few successful monthly luncheons the following **six (6) entities became new referral partners!** These partners help the NELCDC educate clients and become referrals when clients are mortgage-ready or act as referral for other education and guidance:

1. First Capital Bank of Texas
2. Freedom Mortgage
3. First United Mortgage
4. Peoples Bank
5. City Bank
6. Legal Shield

Note, Prosperity Bank became a partner in October 2016 so they are not included in this fiscal year's performance measure. Please also note notable partners who have not officially executed a referral partner's agreement but are critical partners in the work we do to serve the community: BBVA Compass Bank (awarded the NELCDC a \$7,500 financial literacy grant in 11/2016 and another \$10,000 in 10/2016); Wells Fargo and Bank of America allowed NELCDC to host a referral partners luncheon at their bank at no cost; Legal Aid of Northwest Texas has become a partner for foreclosure prevention referrals for many clients who call the NELCDC for assistance; and of course LUNA and Habitat for Humanity have been invaluable partners in outreach and overall community revitalization efforts. All of the NELCDC's success would not be as impactful without the partnerships we are so proud to boast! By the end of the fiscal year, the NELCDC has not implemented a clearing house or a CRA proposal packet, but these outcomes will get underway and will be completed in the next fiscal year. The NELCDC has begun to develop ways to expand this program to ensure there is a mutual benefit for the NELCDC and its partners. Watch the NELCDC website for new Referral Program Partner features!



HOME LOAN CENTER



Equal Housing Lender



Housing Counseling Program

Goal 1: Serve 40 clients/households – One-on-One Housing/Credit Counseling

Quarter	Cycle	New Clients	Quarter Total
Quarter 1	October 2015	2	8
	November 2015	2	
	December 2015	4	
Quarter 2	January 2016	2	6
	February 2016	2	
	March 2016	2	
Quarter 3	April 2016	1	2
	May 2016	0	
	June 2016	1	
Quarter 4	July 2016	0	13
	August 2016	9	
	September 2016	4	
Qtr. 1-4 Totals		29	

The NELCDC missed its target of adding 40 new households to its pipeline by 11 new households.

Goal 2: Serve 25 clients/households – Remote One-on-One Housing/Credit Counseling

Quarter	Cycle	New Clients	Quarter Total
Quarter 1	October 2015	2	6
	November 2015	1	
	December 2015	3	
Quarter 2	January 2016	1	8
	February 2016	4	
	March 2016	2	
Quarter 3	April 2016	2	7
	May 2016	3	
	June 2016	2	
Quarter 4	July 2016	5	7
	August 2016	1	
	September 2016	1	
Qtr. 1-4 Totals		28	

The NELCDC exceeded its target of serving 25 households remotely by 3 households.

Goal 3: Serve 75 clients/households – Group Education/Homebuyer Workshops

Quarter	Cycle	Number of Clients Attended	Number of Client Graduates
Quarter 1	Cycle 11 (Oct. 15)	7 attended	1 graduated
	Cycle 12 (Nov. 15)	7 attended	2 graduated
	Cycle 13 (Dec. 15)	9 attended	3 graduated
Quarter 2	Cycle 1 (Jan. 16)	3 attended	3 graduated
	Cycle 2 (Feb. 16)	5 attended	4 graduated
	Cycle 3 (Mar. 16)	2 attended	2 graduated
Quarter 3	Cycle 4 (Apr. 16)	Cancelled	No outcome
	Cycle 5 (May 16)	Cancelled	No outcome
	Cycle 6 (June 16)	5 attended	1 graduated
Quarter 4	Cycle 7 (July 16)	10 attended	4 graduated
	Cycle 8 (August 16)	11 attended	8 graduated
	Cycle 9 (Sept. 16)	6 attended	6 graduated
Qtr. 1-4 Totals		68	34

The NELCDC missed its target of serving 75 households via the monthly homebuyer education workshops by 7 households. As was stated in the quarter 1-quarter 3 report, the NELCDC hired new staff in April and May 2016, which had a significant impact on the fourth quarter monthly workshop performance.

Administrative Performance Measures

Please note the following items will be reported in more detail in the year-end report. However, some brief updates are provided below:

- Board development efforts and outcomes
 - There are no additional updates in board development.
- Professional development
 - An outline of all courses taken by staff, as well as a demonstration of all resources leveraged via the corporation's non-profit status will be outlined in the annual report. It is most important to note the following:
 - All staff members have been able to take various housing and credit counseling training webinar courses, which typically cost \$79 per staff member, at no cost between July 2016 – September 2016 via Neighbor Works.
 - The administrative assistant and executive director took advantage of place-based training in Houston, TX. Two certifications were received, which typically range from \$1300-\$1600 in tuition. The classes were offered for \$100 and \$75. The shared hotel, registration, per diem, and travel is reflected in the \$2084 shown on the profit and loss statement in August 2016 (this was the total for two employees).
- Network Services
 - This has not been implemented to-date.
- Down-payment and closing cost assistance
 - These funds have not been used to-date because a home sale has not been completed to-date.

- Mahon Villas
 - There are no additional updates from the Q1-Q3 consolidated report. However, it is likely a more comprehensive explanation regarding the outcome of the Villa del Norte property may be conveyed in the completed NELCDC FY 15-16 annual report.
- East Lubbock Community Alliance
 - There are no additional updates from the Q1-Q3 consolidated report. However, pictures and descriptive information will be provided in the NELCDC's FY 15-16 annual report, which will highlight the NELCDC's participation and support of the Alliance.

Adopt-a-Spot Program

Goal: 8-10 Households Impacted

Overall, five houses will be impacted in the Dunbar-Manhattan Heights neighborhood. This was the pilot project area for this new program, which began in October 2015. The updates on houses 3, 4, and 5 are documented below.

1. House 3 – Repairs are still underway. Contractors have been consulted because a new window at the rear of the home was not slated but is desperately needed for this home. A portion of the carport must be rebuilt, and the fascia and soffit in various areas needs to be repaired. The NELCDC hired an inspector to complete an inspection of the work to be completed and a work estimates from contractors is underway. The work on this home is much more extensive; therefore, the labor will be conducted by a professional. This project is also slated to be completed by the end of December.
2. House 4 – (9) windows were installed but framing is still pending. Priming and painting was also requested and will be provided following window installation.
3. House 5 – (9) windows have been purchased. Materials needed to complete window framing was also completed. This house is slated to be completed by the end of December.

A total of \$6,885.57 of the \$8,500 budget has been spent in the Dunbar-Manhattan Heights neighborhood. This is largely do to in-kind contributions via volunteer labor as well as some discounted material purchases. Since the NELCDC has received funding for this program over two fiscal years, but a new project has not been implemented in this fiscal year, the NELCDC will not request any additional funding for this program. Plans have begun for new projects to commence in new neighborhoods and the funds from previous funding years (marked as reserves) will be used to complete at least two projects before additional funding is requested for this new program.

Adopt-a-Spot Program Video – Please Click to View

More Transformations Underway...



Other Projects and Initiatives (Performance Measures)

Resource Development – Goal – 6 Grants; 1 Gift Acceptance Policy

The Executive Director submitted or is planning to submit the following grant applications:

Grant Submitted	Awarded	Amount
HUD-Choice Neighborhoods Planning Grant	No	\$0
HUD-Housing Counseling Grant	No	\$0
Scharbauer Foundation Grant	No	\$0
Wells Fargo Charitable Foundation Grant	No	\$0
BBVA Compass Charitable Foundation Grant	Yes	\$7,500
CDBG Foreclosure and Demolition Grant	No	\$0
CDBG Public-Private Partnership Infrastructure Grant	Yes	\$108,500
LEDA Grant (connected with Public Private Partnership)	Yes	\$69,651
Chapter 380 Economic Devt. Grant–City of Lubbock	Yes	\$363,547

The NELCDC received a \$7,500 grant from BBVA Compass Bank for the 15-16 fiscal year and an additional \$10,000 on October 1, 2016. The NELCDC also submitted an application to United Way of Lubbock but the application was not funded. The NELCDC will continue to pursue becoming a United Way community partner.

Fundraising – Goal: 1 Event

The North & East Lubbock CDC successfully held its 11th annual Community Champion Awards Luncheon where community pioneers were honored for their service to the community. The luncheon raised \$25,840 for the North & East Lubbock CDC. 20 back packs were provided at the Texas Tech Back-to-School function and 30 back packs were provided at the VOICES back-to-school event at Mae Simmons. More than 90 parents who stopped by the NELCDC's booth at both events signed up as "interested" in financial literacy or becoming an NELCDC ambassador!

Regis Park Development Project

There are no new updates at this time on this project. NELCDC anticipates there may be activity to report in December 2016 or January 2017.

King's Dominion

The NELCDC sold two of the seven lots mentioned in the Q1-Q3 consolidated report. Three other lots are being discussed; the NELCDC will begin construction this fall on a new single-family home. More plans for King's Dominion build-out are underway and will be presented in a report once confirmed. The NELCDC, as required by its grant management agreement with the City of Lubbock is also working to purchase (assemble) land for development in north and east Lubbock. More updates will be provided in the annual report and upcoming FY 16-17 quarterly reports.

FINANCIAL REPORTS