

JOSH STEIN
Governor
D. REID WILSON
Secretary
SHADI ESKAF
Director



Memo

To: Community Development Block Grant – Infrastructure Grant Recipients and Grant Administrators

From: Eric G. Karis, Program Manager, CDBG-Infrastructure Unit, Division of Water Infrastructure, North Carolina Department of Environmental Quality ^{DS}
EK

Date: December 11, 2025

Subject: Calendar Year 2025 CDBG-I Annual Performance Review (APR)

This is your notice that it is time to report accomplishments achieved with Community Development Block Grant (CDBG)) funds to HUD per regulations at 24 CFR Part §570.491 and §91.520, through an Annual Performance Report (APR).

Reports are required for all grants (to include planning grants) that are active at any time in Calendar Year 2025, and closeout documents have not been received by the Division by December 31, 2025.

To streamline reporting and data tracking, the 2025 APR Excel workbook includes the following compliance reporting forms:

- MWBE HUD Form 2516,
- Fair Housing Report,
- Language Access Plan Report,
- Section 3 Reporting form, and
- Section 504 Report.

Submission and Deadline

One complete original signed hard copy of this APR and an electronic copy of the Excel Workbook must be submitted to the NCDEQ/Division of Water Infrastructure (Division).

A completed APR filing is one in which all the required submission (hardcopy and emailed) documents are received, and all data provided is accurate and the document is signed by the Authorized Representative on the application resolution or an updated resolution on file with the Division.



North Carolina Department of Environmental Quality | Division of Water Infrastructure
512 N. Salisbury Street | 1633 Mail Service Center | Raleigh, North Carolina 27699-1633
919.707.9160

An Equal Opportunity / Affirmative Action Employer
Equal Housing Opportunity



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Mail your original signed APR to the Division and email the 2025 APR Excel Workbook file to your Grants Representative. Please name the electronic file: **“2025 APR Report – Grantee Name and Grant Number.”** Make sure your email subject line has **“2025 APR Report – Grant Name and Grant Number”** for tracking. **Only attach one 2025 APR to an email for filing.**

The original signed APR and the electronic file must be received by **5:00 p.m. on Friday January 23, 2025**. All originally signed APRs must be mailed or sent by overnight service. Walk-ins are not allowed.

Hardcopy Mailing Address options:

<u>OPTION A: PREFERRED METHOD*</u>	<u>OPTION B:</u>
<p>Street / Physical Building Address (UPS, FedEx or Similar Delivery Service)</p> <p>Division of Water Infrastructure C/O CDBG-I Unit 512 N. Salisbury Street Archdale Building (8th Floor) Raleigh, NC 27604</p>	<p>Mail Service Center (United States Postal Service (USPS) Delivery Option - Only)</p> <p>Division of Water Infrastructure C/O CDBG-I Unit 1633 Mail Service Center Raleigh, NC 27699-1633</p>

**We recommend using a delivery service to our physical address to avoid lost packages (Option A).*

PENALTY FOR NOT MEETING SUBMISSION DEADLINE

If the Division does not receive your documents (hardcopy and the electronic APR Excel Workbook file) by **the deadline, all your grant funds will be frozen until the report is received.**

In addition, the timeliness of the submission of this required report will be taken into consideration when determining future funding. If funds are frozen, you are still required to conform to your performance-based grant contract milestones.

NOTIFICATION

An approval email notification will be sent once your complete APR is approved.

We will no longer confirm or provide year-end financial calendar to grantees. It is the responsibility of each grantee to track and maintain accurate financial recordkeeping.

CONTACTS

If you are unsure about your grant status or have questions about APR, call your respective Grants Representative:

- Stephanie Morris at (919) 707-9196 or Stephanie.morris@deq.nc.gov (East/Piedmont Region)
- Nikita Moye at (919) 707-9058 or Nikita.Moye@deq.nc.gov (West/Piedmont Region)

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Should you have questions about a specific compliance Tab of the APR workbook contact:

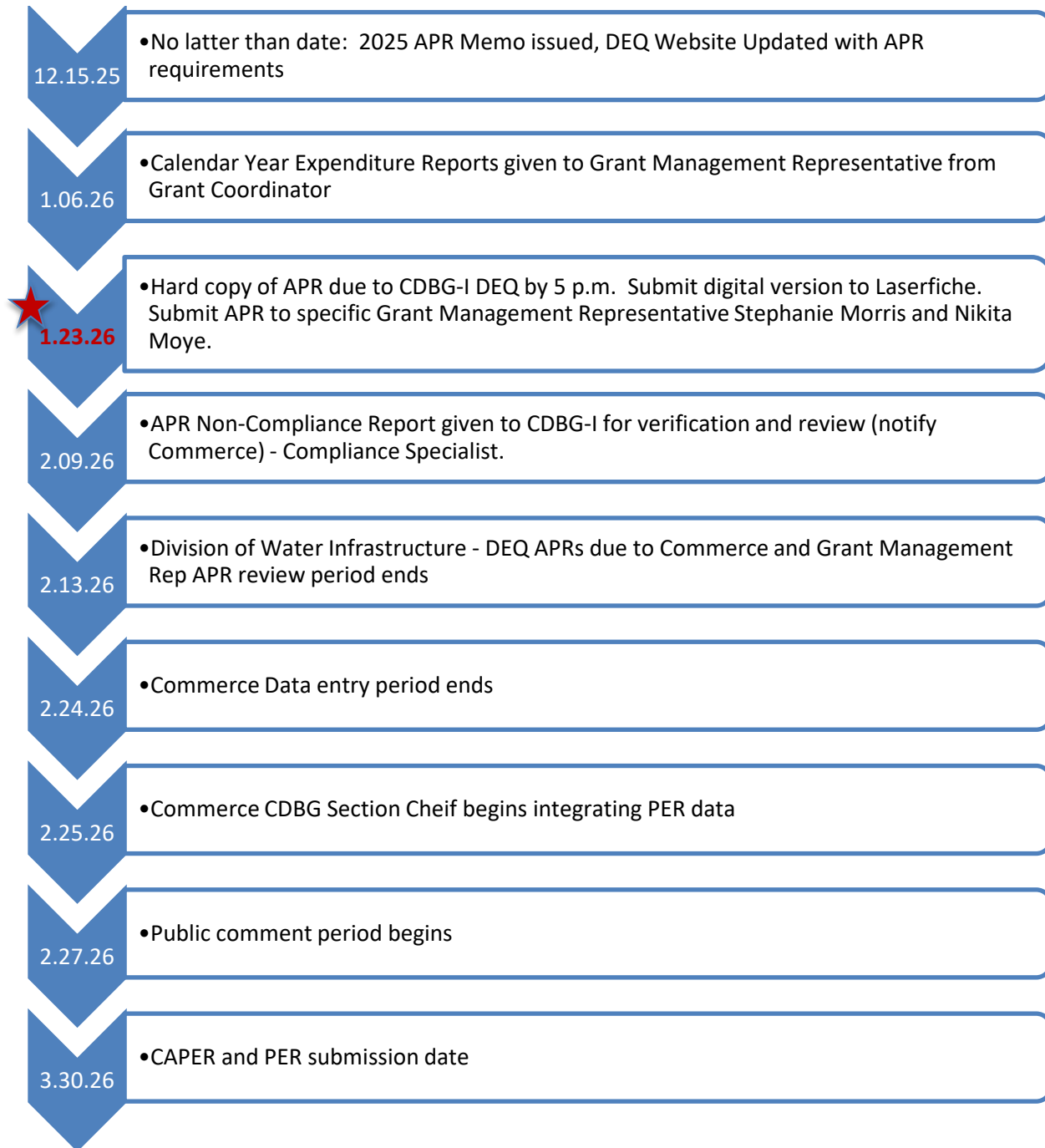
- Emily Bacon at (919) 707-9242 or Emily.Bacon@deq.nc.gov

Attachments:

1. Timeline of 2025 Annual Performance Review Submission
2. Annual Performance Review Instructions
3. North Carolina Department of Environmental Quality 2025 Annual Performance Report (13 Tab Excel Workbook)

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Attachment 1: Timeline of 2025 Annual Performance Review (APR):



CAPER: Consolidated Annual Performance and Evaluation Report
PER: Performance and Evaluation Report

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Attachment 2: Annual Performance Report (APR) Instructions

DUE DATE

Documents to Division of Water Infrastructure (Division) by 5:00 p.m. on Friday, January 23, 2025.

NOTE: fields that are redacted in black are fields that are not reported on. Do not provide information in these areas. See Figure 1 of example of redacted fields from Indicators Forms Instruction Tab:


		2025 Annual Performance Report Activity Indicators Form	
Grantee Name:	0	Check (X) C-1:	
Grant Number:	0		
Project Name:	0		
Activity Name, Number and Code: Select from Dropdown list to the right			
(Funds other than CDBG fund as part of activity.) No Rounding, please use decimals.		\$	-
(Proposed is for entire grant activity. Actual is only for the year 2025.)			
Housing Program Indicators			
Housing Activities		Proposed (For Entire Grant)	Actual (2025)
Single Units - Rental			
Total number of rental units acquired			
Total number of rental units cleared			
Total number of rental units disposed			
Total number of rental households relocated			
Total number of rental units rehabilitated (Additional Housing Connections)			
Number of units brought from substandard to standard condition (NC Rehab Standards)			
Number of units brought into compliance with the lead safe housing rule (24 CFR part 31)			
Number of units occupied by elderly (62 years of age or above)			
Single Units - Owner		Proposed (For Entire Grant)	Actual (2025)
Total number of owner units acquired			
Total number of owner units cleared			
Total number of owner units disposed			
Total number of owner households relocated			
Total number of owner occupied units rehabilitated (Additional Housing Connections)			
Number of units brought from substandard to standard condition (NC Rehab Standards)			
Number of units brought into compliance with the lead safe housing rule (24 CFR part 31)			
Number of units occupied by elderly (62 years of age or above)			

Figure 1: Example of redacted fields to not be filled out.

COVER PAGE INSTRUCTIONS

The Cover Page (signatory page) must have the original signature of the Authorized Representative (application resolution or updated resolution on file with Division). If the local government has multiple grants, there must be a separate document completed for each applicable grant.

Do not complete the box at the bottom that states “NCDEQ-DIVISION OF WATER INFRASTRUCTURE OFFICE USE ONLY” and “NC COMMERCE - RURAL DEVELOPMENT OFFICE USE ONLY”.

Reports are required for all grants that are active at any time in 2025 and closeout documents have not been received by the Division by **December 31, 2025**. All planning grants must complete an APR.

To streamline reporting and data tracking, the 2025 APR Excel workbook includes the following compliance reporting forms:

- MWBE HUD Form 2516,
- Fair Housing Report,
- Language Access Plan Report,
- Section 3 Reporting form, and

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- Section 504 Report.

MAIN SUMMARY FORM INSTRUCTIONS

Complete the Main Summary Form by placing a check mark by the grant activities. Please be aware that housing connections should be classified under Rehabilitation, Private.

In the boxes to the right, type the amounts budgeted for the entire grant and the requisitions paid between **01/01/2025** and **12/31/2025** in the correct field. If you do not have a budget activity for Planning and/or Administrator, leave these fields blank.

In the Section 3 Reporting box, please indicate with a check mark whether your grant activities are subject to Section 3. See Section 3 tab for more details.

ACTIVITY INDICATOR FORM AND OTHER INDICATORS FORM INSTRUCTIONS

The Activity Indicator Form uses performance measures indicators. The Other Indicators Form is for the Accomplishments and Beneficiaries information and resembles the Accomplishments and Beneficiaries Form used in past APRs. There is one Activity Indicator Form template and one Other Indicators Form template. **Use the templates to produce the two required completed forms for each activity in your grant, except for Administration and Planning.**

For the CDBG-I program, there are two activity indicators on the:

1. Housing Program, and
2. Non-Economic Development Public Infrastructure Program.

Provide both Proposed (P) (for the entire grant) and Actual (A) only data for each set of indicators for the activity. If a section does not apply, LEAVE BLANK AND DO NOT COMPLETE and use the COMMENTS BOX for additional information.

Please note that the Housing Activities under the Housing Program Indicators and the separate infrastructure activities under Non-Economic Development Public Infrastructure Program have been broken out as familiar budget line items to provide additional IDIS information (i.e. rental units rehabilitated or owner occupied units rehabilitated, water or sewer). If any of your approved project activities fall within any of these sections, complete an *Activity Indicator Form* and *Other Indicators Form* for each activity. Under the Housing Program Section or the Non-Economic Public Infrastructure Section, provide both forms for each activity as appropriate (i.e. housing connections/rehabilitation

For example, if you have new water house connections, for both owner-occupied and rental houses, and water improvements, you will need to complete an *Activity Indicator Form* and an *Other Indicator Form* for each of these activities: (1) rehabilitation and (2) water.

and/or water improvements).

Please remember that an Infrastructure housing connection (hook-up) is a housing activity (rehabilitation, private), not an infrastructure activity.

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Please note that under **Race Code** information, the indicators are placed in two different categories: Renter and Owner. Fill out the information accordingly. Also, please select households or people to verify the type of information given (this should match the IDIS data previously provided). *Note: If you are designating the number of households, how many households are in each unit and how many people per household, use the comments box that is placed at the end of the Other Indicators Form. If you are reporting rehabilitation totals, these are reported by housing units not people. You may report the number of people per housing unit in the Comment box, but the requirement is for the number of housing units.*

For water housing connections (rehabilitation, private) the income level and race code must be reported per household, and water improvements must be reported per person, you will need to complete an Activity Indicator Form and an Other Indicator Form for each of these activities.

USING THE APR TEMPLATES

Excel Workbook:

You may create a new worksheet for each new other indicator and activity indicator form as you go, or you may prefer to create all the new worksheets for your additional indicator forms in your project prior to copying the templates to the new worksheets. You may want to open the Indicator worksheet so the new worksheets will be to the left of it. To save a template to a new worksheet, you must first create the worksheet and rename the worksheet tab to that of the activity.

IMPORTANT: Do not save a completed worksheet to the template tabs.

Creating a New Worksheet Tab

1. **Right** Click on the tab at the bottom of the Excel page that you want to make a copy of.
2. Select **“Move or Copy”**
3. Check the box **“Create a Copy”**
4. Select which Tab you want the new worksheet to be in front of (left of).
5. Hit **OK**.
6. Right Click that new tab you just created and select **“Rename”**. Enter that new name.

SUBMITTING YOUR APR TO THE DIVISION (MAILED AND EMAILED) AND DEADLINE

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