

# RECLAIMING OUR NEIGHBORHOODS COALITION

## SUSTAINABILITY PLAN

March 2020



### SPONSOR

Healthier Wisconsin Endowment, Medical College of Wisconsin

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*Sustainability encompasses both financial stability (the ability to generate resources to meet the needs of the present without compromising the future) and programmatic sustainability (the ability to develop, mature, and cycle out program to be responsive to constituencies over time).*

*Jeanne Bell, Nonprofit Quarterly, 2019*

### INTRODUCTION

Through its Healthier Wisconsin Endowment, the Medical College of Wisconsin awarded a grant of \$10,000 over 12 months to Local Initiative Support Corporation (LISC) Milwaukee as fiscal agent for the Reclaiming Our Neighborhoods Coalition. Reclaiming Our Neighborhoods proposed to use the Change Incubator funds for a strategic planning process to produce “a sustainability plan that facilitates the growth of the group and maximizes the impact of the neighborhood housing surveys, thus improving housing conditions and health outcomes for Milwaukee residents.”

The Coalition’s steering committee issued a Request for Proposals to identify technical assistance providers, interviewed respondents, and subsequently contracted with Lloyd Consulting, Inc. Lloyd suggested a 12-month approach that would:

- Produce an action plan for the coalition’s growth and sustainability;
- Ground the process in the values, knowledge, and experience of the members;
- Account for the differences as well as similarities among the group’s members;
- Specify and develop agreement about short- and long-term goals and priorities;
- Describe the desired capacities and organizational structure needed for growth; and
- Propose a plan for securing technical and financial resources.

This document is the sustainability plan for Reclaiming Our Neighborhoods. It is based on information and ideas gathered through document review and observation; interviews with group members, funders, and city department staff; and meetings with advisory agencies, intermediaries, and technology services providers.<sup>1</sup> It is also the product of a 12-month iterative process. Grounded in SOAR analysis and co-facilitated by Dawn Hutchinson-Weiss and Susan Lloyd, the planning process consisted of two half-day retreats to set and affirm direction, topic-specific discussions at eight members' meetings, and six decision-making meetings with steering committee members.<sup>2</sup>

As described in the sections that follow, Reclaiming Our Neighborhoods members used the capacity building and planning process to articulate the Coalition's vision, mission, and values. They also reached decisions about the purpose and priorities of Reclaiming Our Neighborhoods, its organizational structure and operations, and growth and sustainability. This sustainability plan is organized in sections as follows:

1. Reclaiming Our Neighborhoods
2. Programmatic Sustainability
3. Organizational Sustainability

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<sup>1</sup> In this and other instances, "member" refers to individuals who regularly participate the Reclaiming Our Neighborhood Coalition. Its use is not meant to suggest that Coalition is or plans to become a fee-based membership organization.

<sup>2</sup> SOAR analysis, a more effective alternative to Strengths, Weaknesses, Opportunities, and Threats is an asset-based approach that focuses on Strengths, Opportunities, Aspirations, and Results (Stavros and Hinrichs, 2019). Comments in quotations indicate verbatim remarks from planning discussions. Trained in facilitative leadership, Dawn Hutchinson-Weiss consults with community organizations on mission advancement, fund development, and communications through Goodflow Enterprises. Susan Lloyd, PhD, consults with foundations and nonprofit organizations on program design, strategy development, and evaluation. Strategic planning documents are available on request.

## 1. RECLAIMING OUR NEIGHBORHOODS

As is the case in many American cities today, the demand for affordable housing in Milwaukee far outstrips the supply. The demand for housing that is both affordable and in good repair is even greater. Low- and moderate-income communities that have been subjected to redlining, harmed by urban renewal policies, exploited by subprime lenders, and undervalued by appraisal algorithms are the neighborhoods pockmarked with vacant lots and properties in disrepair. They are also the communities at the heart of Reclaiming Our Neighborhoods.

From its inception, the Coalition has assessed the exteriors of residential properties in four under-resourced communities in order to help low- and moderate-income homeowners gain access to resources that can help them correct code violations and otherwise maintain their properties; hold absentee landlords accountable for the condition of their properties; and triage nuisance properties that, left unaddressed, would affect other housing and compromise the quality of community life.

Through their relationships with neighbors and their work in communities, Reclaiming Our Neighborhoods founders know that intervening to maintain properties has multiple benefits, benefits that have been well-documented in academic and policy studies. For many households, homeownership is the single greatest contributor to economic stability and access to opportunity. Keeping properties in good repair sustains the value of the asset, makes the transfer of wealth from one generation to the next a possibility and, in many cases, reduces stress and otherwise enhances health and well-being.

Reclaiming Our Neighborhoods formed in 2013, when the Metropolitan Milwaukee Fair Housing Council won a lawsuit against Wells Fargo bank, which was found guilty of redlining. The Fair Housing Council regranted settlement funds to remedial efforts, one of which was the expansion of the housing survey work that the Sherman Park Community Association had done for years. With funding from the settlement and technical assistance from intermediary organizations, Sherman Park Community Association recruited and trained three other community-based organizations—Washington Park Partners, Clarke Square Neighborhood Initiative, and Riverworks Development Corporation—to survey housing conditions in their communities. These organizations formed Reclaiming Our Neighborhoods, and their representatives continue to serve on the Coalition’s steering committee today.

Since then, Reclaiming Our Neighborhoods has expanded its reach beyond local organizations in low- and moderate-income communities to include, among others, representatives of public agencies, intermediary organizations, advocacy groups, academic institutions, and elected officials. It has also begun to establish a record of accomplishment.

- In 2014 Reclaiming Our Neighborhoods helped create Milwaukee’s Compliance Loan Program. Managed by the Milwaukee Department of Neighborhood Services, the Compliance Loan Program provides rehab assistance to owner-occupants that have open code violations, but lack the funds to make necessary repairs. If left unaddressed, open code violations can lead to the accumulation of fines and increase the risk that a property would be subjected to tax foreclosure—a situation with negative implications for both the homeowner and the municipality. Since the inception of the Compliance Loan Program, Reclaiming Our Neighborhoods has partnered with city government to finance 125 housing repair projects, an investment of more than \$1.6 million in Milwaukee neighborhoods.
- In 2015, with the passage of legislation dealing with “zombie” properties, Legal Action of Wisconsin and the City Attorney’s Office became more active with Reclaiming Our Neighborhoods. They and others realized that, because of the housing survey, Coalition leaders were and remain especially well-position to identify houses where stalled foreclosure proceedings led owners (or mortgagors) to vacate properties and the properties fell into disrepair.
- In 2017, the Compliance Loan Program won the Wisconsin Policy Forum’s Innovative Approach to Problem Solving Award.
- In 2018, LISC Milwaukee provided a grant for Reclaiming Our Neighborhoods to contract with Data You Can Use to develop and test improvements to the housing survey carried out by its members. For each of the four neighborhoods, Data You Can Use pulled a random sample of 100 residential properties from a single census tract entirely within the neighborhood’s boundaries. Trained volunteers, most of them Coalition members, carried out the pilot, using a detailed survey instrument to assess the level of repair needed to the exteriors of properties in the sample. With the pilot, Reclaiming Our Neighborhoods sought to create a consistent sample across the neighborhoods and enhance the objectivity of volunteers’ assessments of properties. In 2018 as well, Coalition members presented a workshop at the Reclaiming Vacant Properties national conference, sharing the knowledge they had gained with other people from cities facing similar issues.

- In 2019, at the MANDIs, the Milwaukee Awards for Neighborhood Development Innovation sponsored by LISC Milwaukee, the Reclaiming Our Neighborhoods Coalition received the Northwestern Mutual Collaboration Award and \$20,000 in funds in recognition of its cross-sector, cross-community work to address some of the challenges faced by Milwaukee homeowners.

Today, Reclaiming Our Neighborhoods aspires to continue serving as a crucial source of information about housing affordability and quality; improve and expand the use of its housing survey instrument and methodology; and, in partnership with others, advance housing policy reforms. It also seeks to raise the funds needed to carry out the Coalition's activities, now and into the future.

## 2. PROGRAMMATIC SUSTAINABILITY

To arrive at a mission statement, the steering committee and the larger group of Coalition members engaged in several rounds of facilitated discussion, using earlier individual interviews findings conducted with a cross-section of members as the starting point. The same process enabled the group to articulate a vision and set of values to inspire and drive their efforts. Together, the statements of vision, mission, and values create a framework for understanding what brings the members together on a monthly basis. They also reflect what Reclaiming Our Neighborhoods participants—no matter their sector or institutional setting—find distinctly useful and important about the Coalition and what they want to undertake in the months and years ahead.

| RECLAIMING OUR NEIGHBORHOODS COALITION |  |
|--|--|
| <b>MISSION</b>                         | <i>Reclaiming Our Neighborhoods is a coalition of neighborhood organizations and allies that improves the quality of housing in Milwaukee through data-informed, resident-engaged strategies and actions.</i>  |
| <b>VISION</b>                          | <i>Equitable, healthy neighborhoods of choice and opportunity for all residents.</i>   |
| <b>VALUES</b>                          | <p><b>Resident Leadership</b><br/><i>Resident leadership is the hallmark of healthy communities. Our practice cultivates informed and connected residents capable of addressing challenges in their neighborhoods.</i></p> <p><b>Collaboration</b><br/><i>We are stronger together. We work with government, nonprofit, and private sector resources, connections, and methods to achieve our goals.</i></p> <p><b>Data</b><br/><i>Data is the foundation for our efficacy. We use data to inform our strategy and practice.</i></p> <p><b>Diversity</b><br/><i>Complex issues require comprehensive contributions. As we bring together diverse voices, resources, and experience we gain strength and resilience.</i></p> <p><b>Housing</b><br/><i>Housing is the foundation of safe and healthy families and communities. Our unity comes from a shared belief that quality housing improves neighborhoods.</i></p> |

Consistent with this framework, Reclaiming Our Neighborhoods lifted up two priorities: enhancing and expanding the use of the housing survey; and, in partnership with like-minded organizations, advocating policy initiatives to improve the quality and affordability of housing in Milwaukee. The steering committee subsequently outlined steps that Reclaiming Our Neighborhoods will take to act on these priorities over the next three to five years.

### Priority 1: Enhance and expand the use of the housing survey [and establish a housing data users group]

To improve the survey and create a shared dataset on housing quality across Milwaukee's neighborhoods, Reclaiming Our Neighborhoods will convene a housing data users group to focus on standardizing the survey instrument and methodology. The users group will involve representatives of the community organizations that initially formed Reclaiming Our Neighborhoods, as well as other organizations who are or would like to carry out housing surveys.

The Coalition will contract Data You Can Use, a data intermediary and local partner to the National Neighborhood Indicators Partnership, to provide expert technical assistance to the users group. While an agreement has yet to be developed, the steering committee expects to fund Data You Can Use to:

- Assist the users group as they establish guidelines for developing a shared dataset;
- Advise on ways of assuring the consistency of data across neighborhoods, while preserving local autonomy over aspects that can differ; and
- Deliver training and technical assistance to housing survey implementers.

The steering committee will encourage other neighborhood groups—those already implementing housing surveys and others interested in doing survey work—to participate in the Coalition's monthly meetings and in the housing users group. One of the questions that emerged in the planning process was the question of “whether to go deep, or to go wide,” shorthand for seemingly conflicting desire to improve the survey instrument and methodology and to expand the use of the housing survey by other neighborhood groups. To some extent, the question has already been answered—other groups are already conducting housing surveys. In the end, with the guidance of Data You Can Use, the housing users group could emerge as a community of practice for individuals and organizations working with housing data.

The steering committee also discussed and reached decisions about technical issues related to creating a shared dataset. Reclaiming Our Neighborhoods will continue to use Loveland



Technologies LandGrid, the platform already in use by some neighborhood groups, city departments and local business improvement districts. LISC Milwaukee holds the contract with Loveland Technologies, and will continue to act as the liaison to the software provider. Along the way, several conversations with LISC and Loveland provided answers to important questions. In addition to clearing up some misconceptions, the conversations clarified that:

- Data entered on the Loveland Technologies LandGrid platform are the property of the organizations that supply the data;
- Sharing neighborhood-specific data requires the expressed permission of the organization that supplies the data;
- Sharing of data that can be linked to a survey respondent or to a small number of respondents is prohibited;
- Survey data can and will be linked to city and other sources of data; and
- Should the need or desire arise, the data are readily transferable to a different software provider and that Loveland Technologies will take reasonable steps to facilitate the transfer.

In considering what it would take to improve and expand the housing survey, Reclaiming Our Neighborhoods also acknowledged that the survey is but a means to an end. The members recognize that a shared dataset that enables comparisons and analyses over time could be used for several purposes: to better understand what is happening (or not happening) in the city's neighborhoods; allocate resources based on evidence of actual conditions; evaluate the impact of different activities and interventions; and inform a range of public and private efforts intended to improve housing affordability and quality. A shared dataset would also inform the Coalition's work on its second priority.

## Priority 2: Increase the coalition's influence by creating and activating an advocacy platform [and establish an advocacy task force]

Reclaiming Our Neighborhoods members see the Coalition as one entity among many in Milwaukee concerned about poor housing conditions, the impact on people and place, and the constraints they impose on prosperity. They also see an opportunity to contribute to policy efforts aligned with the group's interests and values, bringing both data and cross-sector perspectives to bear. In interviews and discussions throughout the planning process, the members expressed the desire to apply their knowledge and data to address the effects of poor housing on people's health, economic security, and transfer of wealth.

Evidence of need and interest notwithstanding, Reclaiming Our Neighborhoods does not have the capacity to lead advocacy initiatives, nor does it wish to create the kind of organization that would, at least in the short term. Instead, the Coalition wants to form partnerships with and support like-minded organizations—some of them Coalition members already—that are



### 3. ORGANIZATIONAL SUSTAINABILITY

Unlike many strategic planning processes for emerging organizations, strategic planning with the Reclaiming Our Neighborhoods Coalition did not result in a decision to establish a separate 501(c)3 organization. Instead, in individual interviews and group discussions, members cautioned against “too much organization.” They worried that formalizing the Coalition would threaten what they value most about it—the free exchange of useful information across sectors, based on trusting relationships developed over time. They appreciate the content of the work, the colleagues with whom they interact, and the camaraderie that characterizes their meetings. Of their monthly gatherings, they say, “It feels like family, feels like a group of people who really do care, genuinely care.”

The consensus position, confirmed several times over the course of planning, was to continue to operate as a relatively unstructured affinity group, as a “coalition of neighborhood organizations and allies” bound by a common vision and set of values. Discussants expressed this preference in several ways. Some talked in practical “if-it-ain’t-broke, don’t-fix-it” terms, noting that the Coalition’s monthly meetings are a neutral venue where nonprofits obtain timely information about city policies and programs, and city departments gain access to the on-the-street knowledge and outreach networks of community groups. The opportunity to learn about and understand “how things really work” was mentioned by nearly all interviewees as a primary reason for their participating in Reclaiming Our Neighborhoods.

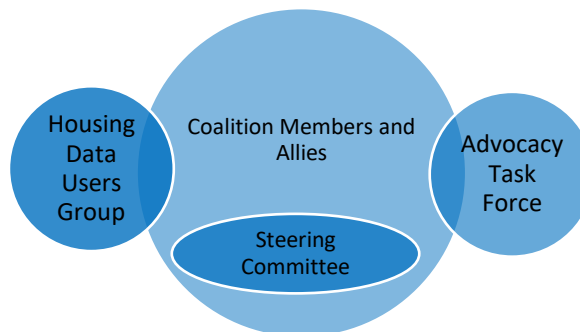
By organizing as an affinity group, Reclaiming Our Neighborhoods will retain its culture of collaboration and continue to attract a distinctive mix of “housers.” Coalition members are staff and residents associated with neighborhood agencies that actively support housing quality; other community-based nonprofits; representatives of policy and community development financial intermediaries; managers of city departments involved in housing and neighborhood issues; and, occasionally, foundation staff and elected officials. Together, they focus their discussions on triaging issues related to housing conditions brought forward by neighborhood groups; informing neighborhood groups of resources and opportunities; and strengthening relations and aligning resources between neighborhoods, city departments and, sometimes, place-based funders.

While interviewees and discussants expressed some reluctance about organizational change, they also acknowledge the benefits of formalizing some Coalition functions, if only to increase the group’s influence and make better use of housing data. They affirmed the ideal structure, depicted and described in the next sections, as one that facilitates the incremental growth they want, yet poses as little risk as possible to the group’s “feel.”

Beginning in 2020, the Reclaiming Our Neighborhoods Coalition will be coordinated by a formally recognized steering committee. In turn, the steering committee will be staffed by a part-time coordinator contracted to support the committee and, through the committee, the Coalition’s work.

Efforts to make progress on the Coalition’s two priorities will be planned and implemented by working groups, initially a housing users group and an advocacy task force. The groups’ efforts will be supported by the contracted coordinator and managed by the steering committee. Because the structure formalizes operating processes that are already in use and thus familiar, it accommodates both the aspiration for growth and the desire for stasis.

## ORGANIZATIONAL STRUCTURE



### Steering Committee

The steering committee will be comprised of one member of each of the “founding neighborhoods” and LISC Milwaukee. In the event of a vacancy, a successor will be nominated by the relevant community organization, to be confirmed by the remaining steering committee members. As fiscal sponsor and liaison to the current software provider, LISC Milwaukee will also be represented on the steering committee, with its representative serving in an ex-officio capacity. Steering committee members will endeavor to make decisions by consensus. In the event of that agreement cannot be reached, the preferences of the majority of steering committee members will prevail. Members will hold themselves and others accountable to the mission, vision, and values of the Reclaiming Our Neighborhoods Coalition, and to the Coalition’s members, advocacy partners, allies, and funders.

Steering committee members will be responsible for accomplishing a mix of programmatic and organizational objectives, including: developing and adopting metrics for organizational development; raising funds and other resources; approving program, users group, and advocacy task force plans; assuring the legitimacy of data; forming partnerships or contractual relationships; developing and monitoring an annual operating budget; selecting and evaluating an individual to fill the position of coordinator; approving special projects and special-project budgets; authorizing the use of funds; and representing the organization’s interests.

## Working Groups

As detailed earlier, Reclaiming Our Neighborhoods has zeroed in on two priorities to advance in the near term: improving and expanding the use of the housing survey and increasing its influence through partnerships to support advocacy positions and initiatives. The Coalition will form two working groups to advance its priorities: a housing data users group and an advocacy task force. The housing data users group will build a community of practice, share best practices, align resources, and develop strategies. The advocacy task force will form partnerships through which to advance policy and regulatory change. Once formed, each group will determine a course of action, develop and implement an action plan, and identify and monitor progress against performance metrics. The housing users group is expected to form and begin work in the second quarter of 2020. The advocacy task force will likely form later in 2020.

## Fiscal Sponsor

As is the case now, Reclaiming Our Neighborhoods will establish a fiscal sponsor arrangement with a nonprofit organization. LISC Milwaukee currently serves in this capacity. Because the arrangement has worked well, the steering committee plans to continue with LISC Milwaukee as fiscal sponsor and, when needed, will negotiate a memorandum of agreement to confirm the details. The anticipated MOU will specify the division of labor and responsibility for accounting, financial reporting, grants administration, and contracting with vendors or service providers. The Coalition will pay a fee, not to exceed 12 percent of the Coalition's annual revenue then being administered, to the fiscal sponsor.

## Coordinator

The recruitment of a part-time coordinator has been identified as the first order of business for the steering committee. LISC Milwaukee or some other nonprofit organization will serve as the employer or contractor of record, the steering committee will produce the job description, recruit and select the coordinator, negotiate the stipend, supervise and support the individual, and manage the relationship and contractual arrangement. Funds being held in reserve will be used for that purpose, and to contract with Data You Can Use to assist with the startup and work of the housing users group.

## Finances

The planning process looked at programmatic sustainability, as described in the previous sections. It also looked at financial sustainability, considering both the uses and sources of funds. The Coalition adopted a case for support that, with some tailoring to the recipient, will

be used to apply for funding. The steering committee will create a year-one fundraising plan, relying on the case and prospect research that identified more than 20 possible funders, their areas of interest, deadlines, and preferred approaches.

Reclaiming Our Neighborhoods Coalition will grow gradually to an annualized operating budget of \$250,000. The Coalition initially considered a budget of \$750,000 over three years. In later deliberations, the steering committee members came to favor an incremental approach to growth, in terms of both program and budget. They agreed to a 2020 operating budget of \$70,000; a 2021 budget of \$145,000, and a 2022 budget of \$250,000. They also outlined the major categories of expense, as follows:

| RECLAIMING OUR NEIGHBORHOODS COALITION          |                 |                  |                  |
|---|-----------------|------------------|------------------|
| Operating Budget Projections, 2020 through 2022 |                 |                  |                  |
|   | 2020            | 2021             | 2022             |
| Coordinator stipend                             | 10,000          | 20,000           | 50,000           |
| Survey stipends                                 | 40,000          | 100,000          | 150,000          |
| Data partner                                    | 15,000          | 15,000           | 15,000           |
| Advocacy  |                 |                  | 20,000           |
| Fiscal sponsor fee                              | 5,000           | 10,000           | 15,000           |
| <b>TOTAL</b>                                    | <b>\$70,000</b> | <b>\$145,000</b> | <b>\$250,000</b> |

This ramp-up approach, as the committee members refer to it, takes into account the Coalition’s programmatic ambitions. It also takes into account the limited availability of funding for housing and community development in Milwaukee. By requiring fewer resources at the outset, the approach will give Reclaiming Our Neighborhoods some running room to cultivate relationships with funders, public as well as private, and to explore other ways to add capacity, such as staffing through the AmeriCorps and Trinity Fellows programs.

In 2020, the steering committee members expect to raise \$50,000 for operations; they will also allocate \$20,000 held in reserve for two purposes: \$10,000 toward a contract with Data You Can Use and the balance for a coordinator’s stipend.<sup>4</sup> As needed, project-specific funds to support the efforts of the working groups will also be solicited.

In the next few months, the steering committee members will contract with Data You Can Use, hire a part-time coordinator, and develop a communications plan to support the release of the

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<sup>4</sup> Reclaiming Our Neighborhoods was granted \$20,000 by Northwestern Mutual Foundation as the winner of the 2019 MANDI award for collaboration. The group decided to complete the planning process before considering how to use the funds.

sustainability plan. They see the release as a singular opportunity to convey the Coalition's vision and priorities to wider audiences, including prospective funders. They will use the sustainability plan, the prospect research, and the case for support to reach potential funders, raise the visibility of Reclaiming Our Neighborhoods, and garner financial support for the Coalition's activities in 2020 and beyond.