

Northwest Side Community Development Corporation



2017 - 2019 Strategic Implementation Plan

Dear NWSCDC Board & Staff:

Please remember, your *2016 Strategic Implementation Plan* is an organic document. Therefore, we suggestion you integrate this plan into your organization through your regularly scheduled meetings. You might start by monitoring your progress on a monthly and/or quarterly basis which consists of reviewing, discussing and providing updates on your strategic implementation plan.

Also, to continue our partnership we will provide you with an opportunity for us to monitor your progress and help support your success and sustainability, by returning to facilitate follow-up sessions at your convenience. Finally, please find below the *definitions* of some key components which will guide you through this strategic implementation plan:

Assessment Date: To keep you on track in accomplishing your organizational goals, place this date on your meeting agenda for updates/progress discussions for each goal.

Estimated Budget: This is the estimated dollar amount it might take to accomplish your organizational goal.

Strategic Implementer(s): This is the person(s) responsible for implementing and completing the strategies outlined for that particular goal.

NWSCDC's Board and/or Program/Service Area: Informs you on the targeted board focus or and/or key programs/service area/focus that particular goal is intended for.

Strategic Tasks: Through your stated identified task(s) you will be able to noticeably experience your achievements.

Deliverables: Details the results of the measurable outcome, it might describe a tangible or intangible objective produced as a result of accomplishing your strategic task(s) that is intended to be delivered to a specific target (either internal or external).

Collective Impact: As a result of accomplishing your goal, state the collective impact you would like to have within the community (this might and can related to local, state and/or national) which should involve the active engagement of key stakeholders.

Comments Section: Your plan is an organic document, therefore, please write any comments in this section, as well as, the recording the date you completed each goal.

Vision:

The NWSCDC will lead the transformation of the Northwest Side of Milwaukee into a preferred destination for businesses and residents

Mission:

We exist on the Northwest Side to create jobs, build partnerships and strengthen communities

Core Values:

Integrity

Consistency of Purpose

Community

Bringing together financial, business and residential communities

Leadership

Leveraging Partnership

Catalyst

Agent for Economic and Community Change

NWSCDC's History:

The Northwest Side Community Development Corporation (NWSCDC) has served the economic development needs of Milwaukee's low-income communities since being founded in 1983. The NWSCDC has assisted with neighborhood strategic planning to improve safety, land use planning and development on the Northwest Side to spur retail growth, and numerous business and workforce development programs.

Throughout our 34-year history, the NWSCDC has innovated and adapted to changes in the community and economic development landscape. The innovation, along with the continuity of management and a strong board of directors, has allowed the NWSCDC to thrive in the face of adversity. In the late 1990s, the NWSCDC board and management developed and began to implement a new business model for community economic development. The new model emphasizes leveraging partnerships and collaborating in business creation and real estate transactions. With this new model, the NWSCDC has pioneered efforts to partner with large businesses such as DRS Power and Controls Technologies and Jonco Industries.

As a result of the new collaborative strategy, the NWSCDC has lent over \$6 million to several major catalytic projects on the Northwest Side since 2000. These projects, which have created over 500 jobs, include the following:

- Helping to finance the second phase development at Midtown Center
- Assisting with financing of two Lena's and one Kohl's grocery store
- Creating the Milwaukee Technology Incubator Center within DRS Power Controls and Technologies
- Creating a third, smaller retail development plan with Lena's at Midtown Center
- Financing the start-up of Nature Tech, a green technology employer focused on sustainable products
- Helping to finance the expansion of Diamond Precision into Milwaukee
- Assisting with financing the purchase of Century City Tower, the former Eaton Corporation headquarters

The NWSCDC's most recent real estate project is Villard Square, an \$11 Million, mixed-use development that combines a Milwaukee Public Library branch with 47 units of mixed-income housing for "grand families" – family units where grandparents are serving as the primary caregivers for their grandchildren. Villard Square is a multi-faceted success story that encapsulates the mission of the NWSCDC.

NWSCDC's Strategic Narrative:

We have pioneered many innovations in the City of Milwaukee, and the state of Wisconsin. For example, the Villard Library, have changed Milwaukee Public Library policy. We have encouraged other community development entities to be bold, unafraid, and not back away from a community development challenge because it is hard, or hasn't been done before.

Partnerships and alliances have been at the core of our CDC's strategy. Convincing larger partners to play a role that can be risky and not inherently in their core missions, is at the center of what we do. A youthful outlook, and ability to adapt to changing times and new models is our hallmark.

Program/Service Areas:

CDFI: We are a US Treasury certified, non bank lender. We lend federal funds and patient Capitol funds to catalytic and strategically significant businesses such as DRS and Lena's.

Community Development & Neighborhood Strategic Plan (NSP): We have three city contracted areas where we engage residents in traditional organizing activities, such as block watch and anti-crime.

Storm Water Management: We are contracted by MMSD to engage residents in activities regarding retention basins in the 30th St Corridor.

Land Use: We are working on a variety of initiatives including Garden Homes, Century a City 2, Ned's Pizza.

Housing: We have purchased seven homes in Little Canada, and will purchase, renovate and sell fifteen homes in Century City Triangle.

**NWSCDC's
Strategic Implementation Plan
3 -Year Goals Overview**

Goal 1: Strengthen Community Programs

Goal 2: Improve Organizational Infrastructure

Goal 3: Promote Fiscal Health

**Goal 4: Develop and Implement Succession Plan to Ensure Future
Sustainability of Organization**

**Goal 5: Establish a Professional Development and Staff
Retention Plan**

**Organizational Goal #1:
Strengthen Community Programs**

Estimated Budget: Operational budget \$5-7M; Development budget including LIHTC and NMTC \$15-20M

Strategic Implementer(s): Northwest Side CDC, MWERC, Gorman USA, Several CBOs, an Authority made up of the City, WHEDA and MMAC.

NWSCDC's Board and/or Program/Service Area: CDFI, Community Development & NSP, Storm Water Management, Land Use, Housing

Assessment Date: Annually

Strategic Tasks:

- Community lending and investment:
 - Strengthen business/community lending:
 - Lend into six major businesses in community
 - Create a mechanism for small business
 - Establish loan guarantee programs with SBA, WHEDA, and additional credit enhancements
 - Establish Villard and ACT BIDs
 - Market and brand community lending program
- Housing:
 - Expand Housing Program:
 - Finish and sell properties in Little Canada
 - Support community efforts to rehab homes in the historic district
 - Wind down participation in single site and single home purchasing
 - Work with partner on potential LIHTC projects
- Community Development:
 - Have measurable results in NSP Areas 1,3,4
 - Develop metric for organizing outcomes
 - Partner with MMSD on outreach in Basin areas
 - Partner with City on Promise Zone communities
- Strategic Alliances:
 - Organize and create consolidated 501c3 to promote development in the Corridor
 - Work to build Century City/30th Street Strategy
 - Support alliance with MWERC
 - Work with MMSD to alleviate flooding

Deliverables:

Community Lending:

- Lending into projects/businesses on NWS and Corridor will leverage public/private resources and create at 500 new jobs.
- The CDC will work to create a vehicle for small business lending; i.e., WERC Bench Lab businesses, BID businesses, small businesses that are located in major commercial corridors and businesses located in EIC by providing financial counselling and other services.
- The CDC will work to provide credit enhancement tools for our lending services.
- Increased community awareness for lending program

Housing:

- Six properties sold in Little Canada
- At least 15 houses purchased, rehabbed, and sold in City Challenge neighborhoods
- Partnership with major developer in at least one or more LIHTC projects

Community Development:

- Tool developed by CDC Program Committee, board, staff and community partners to measure the impact of NSP and other outreach programs
- Fulfillment of contractual obligations in City, MMSD and other contracts received
- Expand services in NSP areas 1, 3, 4

Strategic Alliances:

- Maintained and strengthened relationship with MWERRC and its partners to continue to fill the EIC, incorporate organizational efficiencies, and build the cluster of EPC in the Corridor
- Increased development in the Corridor through partnerships with other community organizations
- The CDC will work with MWERC whenever possible to build Century City I and II.

Collective Impact:

- Induced trend, or momentum that is recognized by most people, social and economic indicators, and a perception that something good is happening.

Organizational Goal #2:
Improve Organizational Infrastructure
Estimated Budget: TBD

Strategic Implementer(s): (Executive) Director, Staff & Board

NWSCDC's Board and/or Program/Service Area: CDFI, Community Development & NSP, Storm Water Management, Land Use, Housing

Assessment Date: January 1, 2018

Strategic Tasks:

- Improve Policies and Procedures:
 - Assess current procedures with staff
 - Determine creation/adjustment of procedures and policies
 - Create policy/procedure handbook
 - Review/revise board training material; create if needed
 - Develop process to enhance board involvement & governance practices
- Conduct shadow training for all staff, designated backup (system and person) in case of staff absence
- Modernize Systems
 - Analyze and improve Staff Network Documentation System
 - Initial tech audit and review network security
 - Improve/create unified contact management system
 - Improve/create offsite access to internal documents
 - Conduct initial assessment of current/recent contacts (individuals and organizations)
- Create historical narrative of NWSCDC

Deliverables:

- Policies/Procedure Handbook
- Board Training Materials
- Integrated Networking System for day-to-day management
- Historic Narrative of NWSCDC, suitable for publication/distribution

Collective Impact:

Improved sustainability of organization – knowledge held by any staff member of organization is incorporated into knowledge management system and can be accessed whether that staff member is present or not.

**Organizational Goal #3:
Promote Fiscal Health
Estimated Budget: TBD**

Strategic Implementer(s): Howard & Board of Directors

NWSCDC's Board and/or Program/Service Area: CDFI, Community Development & NSP, Storm Water Management, Land Use, Housing

Assessment Date: Annually

Strategic Tasks:

- Update All Loan & Related Policies:
 - Update loan ratings to improve transparency around loan quality/risk
 - Update loan reserve calculations, guarantees, and collateral
 - Update loan approval policy to encourage diversification of risk and increase impact

- Improve Connection Between Fiscal Goals and CDFI/Programming Goals:
 - Seek input: How can the CDCs financial policies and resources better support the CDCs programmatic goals?
 - Coordinate the CDFI reserve calculations with our overall financials
 - Improve reporting that shows impact of use of financial resources for community

- Develop an Investment Strategy, Policy, and Reporting:
 - Define Minimum Operating Reserves
 - Report on Net Loan Capacity
 - Develop an Investment Strategy for both operating reserves and unused Loan Capacity, including Patient Capital
 - Address Sustainable and Ethical Investing

- Create Fund Development Plan

- Develop Board Borrowing Policy

Deliverables:

- Updated Loan & Related Policies
- Investment Strategy, Policy, and Reporting
- Fund Development/ Program Funding Roadmap

Collective Impact:

- Improved Cash flow through better investing
- More coordination between funding/programs; looking for funding for the programs we want, versus planning programs dependent on what funding we can get.
- A larger, more diverse and safer loan portfolio, with smaller loans and better guarantees, underwriting, and perfection.

Organizational Goal #4:
Develop and Implement Succession Plan to Ensure Future Sustainability of Organization

Estimated Budget: TBD

Strategic Implementer(s): Howard & Board of Directors

NWSCDC's Board and/or Program/Service Area: CDFI, Community Development & NSP, Storm Water Management, Land Use, Housing

Assessment Date: Annually

Strategic Tasks:

- Consider whether emergency succession plan should be updated
- Consider key readiness plan questions (resources: Transition Planning Toolkit – Federal Reserve Bank of Kansas and Building Leaderful Organizations, Succession Planning for Nonprofits – The Annie E Casey Foundation)
- Conduct annual performance review of the Executive Director
- Establish succession planning process
- Conduct an organizational self-assessment (e.g. key competencies in a leader)
- Review current job descriptions for key positions and any succession planning policies
- Document tasks of staff in key positions
- Ensure the job descriptions for all key positions are accurate and up to date
- Create career ladders with all staff and update them regularly
- Determine potential path for internal succession to key positions. Consider whether “interim ED” position could be filled internally and by whom if such necessity arose
- Determine approximate timeline for Executive Director retirement and create external recruitment plan moving backwards from estimated retirement date. External recruitment plan should include a working list of potential candidates to be targeted by the Executive Director and Board.
- Develop a strategic leadership development plan
- Include objective for leadership development in the next strategic plan

Deliverables:

- Accurate and up-to-date job descriptions for all key positions
- Personalized career ladders for all staff
- Professional development opportunities to aid internal succession (if required by internal promotion plan)
- Executive Director retirement timeline and detailed action plan

Collective Impact:

- CDC will be in strong position to fill vacancies in key positions with minimal impact to day to day functioning of the organization
- Board, funders and stakeholders will have confidence that upon Executive Director retirement, the CDC will remain relevant and strong
- Transition of Executive Director role upon Executive Directors' retirement will go smoothly

Organizational Goal #5:
**Establish a Professional Development and Staff
Retention Plan**
Estimated Budget: TBD

Strategic Implementer(s): Executive, Mid-level and Support Staff
NWSCDC's Board and/or Program/Service Area: CDFI, Community Development & NSP, Storm Water Management, Land Use, Housing

Assessment Date: January 15, 2017

Strategic Tasks:

- Develop a clear process for identifying *areas* of employee development aligned with NWSCDC strategic goals.
- Develop clear, measurable individual professional development goals tied to performance evaluations and needs based.
- Identify and develop an employee needs and recruitment profile for NWSCDC
- Develop and institute annual staff and Executive Director review procedures

Deliverables:

- A NWSCDC working strategic/measurable Professional Development Plan for all employees
- An employee needs plan that identifies skills and standards of performance for each job description

Collective Impact:

- Enhanced and improved employee skills create a more effective program/service delivery.
- An effective retention plan will ensure a smooth transition if/when staff turnover does occur. A retention plan will maintain existing relationships between NWSCDC and the community it serves, minimally impacting the trust built and work accomplished.

Comments Section

Goal 1:

Goal 2:

Goal 3:

Goal 4:

Goal 5:

*Facilitated, Prepared & Designed By:
Ylonda D. Glover, Ph.D. (ABD)
President & Chief Strategy Officer*



TRISUCCESS
MANAGEMENT INSTITUTE, INC

Training Research Innovation

“Redefining Success”

(P) 414.736.1042 (F) 866.882.4507

Yglover@tri-success.com

www.tri-success.com

Mailing Address:

606 East Juneau Avenue #510335

Milwaukee, WI 53203