

Report of 2005

Community Development Summit

The Challenge of Rethinking Resources

June 3, 2005

Italian Community Center

Milwaukee, Wisconsin

Compiled by the:

Urban Economic Development

Association of Wisconsin, Inc.

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EXECUTIVE SUMMARY

The fifth annual Community Development Summit was held on June 3, 2005. The theme was “The Challenge of Rethinking Resources”. Over 20 organizations participated in planning and financing this year’s event.

The first Community Development Summit was arranged as a response to the *Weinheimer Report* that recommended an annual gathering of all sectors to discuss current issues in the field of community and economic development. The Summit’s Planning Committee appreciates the organizations and individuals involved in the past five years for making this wonderful annual gathering possible.

SPONSORSHIPS

A total of 19 organizations provided generous financial support to this event. The principle sponsors of this Summit were: University of Wisconsin-Milwaukee (UWM), Helen Bader Foundation, Wisconsin Housing and Economic Development Authority (WHEDA), Mortgage Guaranty Insurance Corporation, Milwaukee Economic Development Corporation (MEDC), Chase Bank, US Bank, Chicago Federal Home Loan Bank, We Energies, and Wells Fargo. The supporting sponsors include Wegner LLP, Greater Milwaukee Foundation, Park Bank, Local Initiatives Support Corporation (LISC) of Milwaukee, North Shore Bank, M&I Marshall & Ilsley Corporation, TCF Bank, Greater Milwaukee Association of Realtors, and the Federal Reserve Bank of Chicago.

PLANNING COMMITTEE

The Planning Committee included: the Urban Economic Development Association of Wisconsin, Inc. (UEDA), Greater Milwaukee Foundation, Midtown Neighborhood Association, Wells Fargo, Park Bank, WBD Finance Corporation, US

Bank, UWM School of Continuing Education, Riverworks Development Corporation, Acorn Housing Corporation, Avenues West, US Dept. of Housing and Urban Development (HUD), Waukesha County Community Development, LISC, UW-Extension Service, Small Business Administration, UWM Center for Economic Development, Wisconsin Department of Commerce, and Community Development Management Partnerships.

ATTENDANCE

Over 175 individuals attended the fifth annual Summit, and many more joined us throughout the day. A total of 30 speakers represented in six different panel discussions at the Summit.

SUMMIT EVENTS

The Master of Ceremonies for the Opening Plenary was Robert Berlan, who is the Director of Community Planning and Development for HUD. In his brief address, he emphasized the importance of collaborations in the fields of community and economic development.

The Opening Plenary, “Common People...Doing Uncommon Things”, was highlighted by the keynote speaker, Mr. Al Black, Jr., President and CEO of On-Target Supplies & Logistics. Mr. Black advocates an absolute commitment to the faith, family, friends, and the free-enterprise system. In his speech, Mr. Black addressed the relevance of business and entrepreneurship with non-profit sectors and encouraged professionals to rethink resources and make collaborations for community development.

After the Opening Plenary, six panel sessions were held to allow small group discussions on three tracks including business, nonprofit, and housing. For the Business

Track, two sessions were successfully arranged; *Marketplace Alliances* and *TIF Tactics*. For the Nonprofit Track, two sessions commenced: *New Directions in Nonprofit Strategies* and *Discuss, Discern, and Decide: The Making of Successful Collaborations!* For the Housing Track, the two sessions held were, *Mutual Awareness, Mutual Respect: Workforce, Wages, and Affordable Housing*, and *Housing Trust Funds; Milwaukee's New Economic Generator?* The Moderators for this year's Summit volunteered to help navigate the discussions for each session.

At the Luncheon, the Planning Committee decided to celebrate the fifth anniversary of the Summit and address some extraordinary outcomes of the Summit over the past five years. Robert Berlan recited a 'main success' from each year including: Business Assistance Caucus of Milwaukee (BACOM), Milwaukee's Renewal Community Initiative, Milwaukee Community Development Intervention Team, United Neighborhood Centers of Milwaukee, Milwaukee Partnership for Community Development, and Nonprofit Management Standards.

Following Mr. Berlan's address was an awards presentation hosted by Lilith Fowler, UEDA's Board Chair. Tina Kelly-Beckett from Miller Brewing received an award for her service to UEDA's board, and contributions to community development in past five years. Five organizations were acclaimed for their consistent support to the Summit design and funding. These organizations were: LISC, Midtown Neighborhood Association, Helen Bader Foundation, University of Wisconsin Center for Economic Development, and the Greater Milwaukee Foundation. In addition, three individuals were recognized for their contributions to NOHIM and SBA lending through their work with

banks: Pam Anderson from US Bank, Gwen Dansby from US Bank, and Cathi Janchan from Wells Fargo Bank.

BUSINESS TRACK

Session 1: Marketplace Alliances

In the first session of the business track, a panel titled *Marketplace Alliances* examined the variety of business relationships that advanced entrepreneurial activity. Discussions focused on common factors that drove economic growth throughout Wisconsin. Sammis White from UWM School of Continuing Education introduced the paper entitled as “Tale of Two Cities,” and compared the similarities and differences of community development in Green Bay and Milwaukee. Doug Gjerde from the Small Business Development Center in Green Bay discussed the “under one roof” strategy and the alliances in Green Bay. Nate Cunniff from M&I Bank described the M & I business strategy used to leverage SBA products and integrate community based groups in the lending process. Marcia Theusch, from MEDC, described MEDC and its relationship to the City of Milwaukee’s Department of Community Development and bank partners. Bill Mitchell from Waukesha County Economic Development Corporation provided advice for seeing things from the business prospective.

Fourteen of the attendees of this panel completed a survey on it. A majority (92.8%) believed the session allowed them to participate in a constructive dialogue on the future of community development in Milwaukee. Some comments were as followed:

- “Not enough time for questions.”
- “Very good discussion.”
- “Doug Gjerde had good examples of alliances.”

- “Bill Mitchell was very informative-great advice for seeing things from the business prospective.”

Session 2: TIF Tactics

The speakers for this panel reflected on current and future uses of TIF and the ideas incorporating broad-based community benefits as an additional incentive. Patrick Drinan from the City of Brookfield gave an overview of TIF and discussed the choice to offer TIF in Brookfield. Ryan Horton from Wisconsin Public Policy Forum discussed the use of TIF in Milwaukee’s seven county areas. Joel Brennen from Redevelopment Authority of the City of Milwaukee addressed the policies at City Hall on shaping recent TIF choices and strategies. Matthew Mayrl from Center on Wisconsin Strategy (COWS) talked about how they (COWS) expected TIF to evolve and suggested how to improve the mixed use of TIF in Wisconsin. Jackie Leavy from Neighborhood Capital Budget Group Chicago provided her perspective on the responsible use of TIFs and the dangerous abuses of it if it’s not policed.

After the session, 23 of the attendees completed the evaluation form. It was well recognized that this session was very informative although it ran out of time. Excerpts from some comments are as follow:

- “This was an excellent and thought-provoking panel.”
- “Pretty comprehensive information, and diverse viewpoints.”
- “All well prepared. Nice having a pro/con look at TIF.”
- “Very important issue. Would love to learn more.”
- “Not enough time for each speaker as well as Q& A. Really needed more discussion time against the panel.”

SESSIONS IN NONPROFIT TRACK

Session 3: New Directions in Nonprofit Strategies

The panelists discussed the feasibility of forming a state association and local needs and concerns. Heidi L. Fisher from the University of Wisconsin's Eau Claire Foundation presented some base line information. Jose Vasquez, the UW-Extension Diversity Initiatives Specialist, discussed UW's extension services and reflected on his personal experience with small organizations and diverse populations as an executive director of a neighborhood-based group. John Palmer-Smith from the UW-Milwaukee Helen Bader Institute for Nonprofit Management highlighted how the academic center had broadened research and public policy.

The responses from the attendees of this panel were overwhelmingly positive: 91% of respondents believed the workshop educated them on various partnerships and collaborations that foster economic growth in the City of Milwaukee; a majority of respondents (54.5%) thought this workshop allowed a constructive dialogue on the future of community development in Milwaukee. Some comment excerpts are as followed:

- “To be successful, this project needs to be more publicized, sooner than often to gauge and achieve acceptance.”
- “Considering retooling what already exists rather than starting new one—maybe not good /better use of scarce resources, better use by existing one.”
- “It was a little disappointing to hear about the standards of excellence/BGT practices idea as if they were new, after all the work a group of us have already put into this concept a year or so ago.”

- “I like the way that Jose Vasquez stressed the need for a broad nonprofit sector. Great reflection on experiences with small organizations and diverse populations and insights.”

Session 4: Discuss, Discern, and Decide: The Making of Successful Collaborations!

This session was a discussion about resources available to help nonprofit organizations develop a successful collaborative strategy. Steve Holt from Holt & Associates Solutions put the panel in the context of the United Way activity. He discussed his role in the United Way project and some findings in the *Finding the Right Fit* booklet. Lannie Wasserman from United Way and Tony Laszewski from TCF Bank focused on specific ideas illustrated in the *Finding the Right Fit* booklet.

The responses from attendants were very positive, with 87.5% believing that this workshop allowed a constructive dialogue and educated them on various partnerships and collaborations that foster economic growth in the City of Milwaukee. Some comments were quoted as followed:

- “Excellent session.”
- “Excellent resource!”
- “Great lecturing.”
- “Great workshop. The nonprofit collaboration and mergers document is a wonderful resource. Nonprofits need a workshop on collaboration at the local level.”

SESSIONS IN THE HOUSING TRACK

Session 5: Mutual Awareness , Mutual Respect: Workforce, Wages, and Affordable

Housing

This session discussed housing strategies in the booming communities that are seeing increased disconnection of a workforce from their residential community. Jeff Browne from the Public Policy Forum presented affordable housing located in the seven county regions and widening gap between housing affordability and workforce wages. Rocky Marcoux from the City of Milwaukee Department of City Development discussed his reflections and expressed a passionate enthusiasm on developing housing strategies for a workforce with a decreasing wage base. Robin Snyderman, Housing Director for the Metropolitan Planning Council-Chicago, presented the Chicago experience and employer-assisted programs that have evolved in her area. Diane Schobert from WHEDA followed with the work that WHEDA was currently engaged in. She provided the perspectives on what was working and what had great potential in this field.

All of the attendees for this panel agreed that they were allowed to participate in a constructive dialogue. 82% of them believed that the workshop had educated them on various partnerships and collaborations that foster economic growth in the City of Milwaukee. Some comments were as follows:

- “ Every speaker was great! The information provided was extremely helpful.”
- “ As always, Jeff Browne was insightful.”
- “Robin Snyderman good example of a variety of words we can consider.”
- “Rocky Marcoux- gotta love enthusiasm!”

Session 6: as “Housing Trust Fund: Milwaukee’s new Economic Generator?”

This session presented how housing Trust Funds were increasingly being used to add to CDBG, HOME, bank loans, and other sources to build rehabilitate, and retain affordable, accessible housing. Bill Perkins from Wisconsin Partnership for Housing Development presented an out-of-town perspective on the history and development of housing trust funds. Mike Ruzicka from the Greater Milwaukee Association of Realtors provided the larger picture of effects on realtors and housing markets they rely upon. Bethany Sanchez from Metropolitan Milwaukee Fair Housing Council discussed what was proposed in Milwaukee.

Attendees agreed that this was a very informative panel, which was reflected from their comments on this session:

- “Panel was very helpful—information and suggestions.”
- “Excellent information and handouts.”
- “Mike Ruzicka’s presentation was nice, informative—but very brief.”
- “Bill Perkins was a very good speaker, made interesting points about history of trust funds as well.”
- “Bethany Sanchez was very knowledgeable, pointed out information about housing trust funds I did not know about before.”

EVALUATIONS

A survey of 44 Summit participants revealed that the Community Development Summit has been a significant annual event for community development professionals in the Metropolitan Milwaukee area. A total of 97.7% of participants believe the Summit is

a valuable service for community development professionals, and 72.7% of participants look forward to the Summit every year.

Participants shared the following concerns on local issues: 84.1% of them believe the Summit should remain focused on the seven counties nearest to and including Milwaukee. The survey demonstrates participants' expectation for the Summit to include more topics in housing (68.1% positive), business development (63.6% positive), and commercial revitalization and real estate (72.7% positive). 42.2% of participants expect to hear more about HUD/CDBG compliance and regulatory issues, especially when significant changes take place. Participants also expressed their opinions about the productiveness of the Summit. The majority of participants (77.2%) agreed or strongly agreed that half of a day for the Summit is appropriate, and the Summit should expand to include more technical training (63.6%). As to the panel format, 59.1% of participants expect to have more than three speakers in the panel, however, many comment that three speakers in one format is good as long as the speakers' backgrounds are diverse.

In general, participants believed that the panels were informative and the speakers had an impressive presentation. It was appreciated that different perspectives were presented in the panels. Participants expected to have more time for questions and answers and discussion with panelists. Overall, it is widely recognized that the panel sessions allowed professionals to participate in constructive dialogue on various partnerships and collaborations on the future of community development in Milwaukee.