

Proposal to City of Racine, Wisconsin Preparation of a Five-Year Consolidated Plan and 2010 Annual Plan

A. Proposed Approach

Urban Strategies (US) in conjunction with **Community Planning and Development Advisors (CPDA)** will work with the City of Racine Department of City Development to identify, develop, schedule and implement activities necessary to complete a concise, but detailed HUD required Consolidated Plan and Annual Plan for Community Development Block Grant (CDBG), Emergency Shelter Grant (ESG) and HOME funding the period beginning January 1, 2010 through December 31, 2014. The Plans will include all required elements of the Con Plan and Annual Plan using the Consolidated Plan Management Plan tool (CPMP) as well as required strategies, goals and objectives, projects and activities, narratives, tables and recommendations for future considerations and actions. The City has completed its 2010 CDBG allocation process including citizen participation and project determinations and is currently completing this process for the ESG program. The Plans will include elements necessary for the determination of activities and funding for the 2010 HOME Program.

One of the most important parts of this process is consultation intended to reach out to all major players, including policy makers, service providers, housing specialists, funder groups, city and county departments and other essential stakeholders and practitioners within the community. We propose to work with Racine's Department of City Development (DCD) to review and analyze its current community development focus, funding, strategies, goals, objectives and priorities as part of this planning process. This process will include a web-based electronic survey for stakeholders, practitioners, and elected officials as well as members of the Community Development Committee (CDC) to ask for their input on identified needs, existing programs, gaps in the system, and proposed action steps and strategies. Additionally, two focus groups will be conducted for stakeholders, practitioners and elected officials including the CDC. The results of the survey, focus groups, additional interviews as well as an extensive review and analysis of existing documentation will be used to develop preliminary strategy statements and action steps to be presented to DCD for further review and discussion. Following reviews and revisions to these strategy and action recommendations, a complete Consolidated Plan and Annual Plan including Executive Summary, narratives and tables will be developed for submission to HUD for funding.

US-CPDA will be available to present its findings, recommendations and the proposed Con Plan/Annual Plan to the Community Development Committee, City Council and Mayor. Lastly, upon approval of these plans by HUD, **US-CPDA** will provide to the City of Racine a final report including recommendations for future actions to plan, analyze and develop HUD community development programs.

B. Recommended Work Task and estimated hours

Task	Allocation of Hours	Timeline
Meet with Director and Assistant Director of the Department of City Development (DCD) to review and refine work plan, and schedule on-going meetings for data gathering and research, identify stakeholders, practitioners, and other funders and to determine the final a scope of work.	8	\$ 1000
Consult with HUD regarding updates to Con Plan/Annual Plan requirements and needs for Racine	4	\$ 500
Design and provide to DCD a web based survey to be made available to public officials, members of the Community Development Committee, program practitioners and other stakeholders for input on needs, existing programs, gaps and proposed action steps, projects and strategies.	8	\$ 1000
Working with Assistant Director, notify and distribute web based electronic survey to public officials, CD Committee, stakeholders and practitioners. Two week turnaround for responses.	2	\$ 250
Gather relevant local data and assessments, including existing plans, census data, IDIS reports, prior CPMP submission and other documents.	8	\$ 1000
Prepare summary tables and charts regarding past spending and activities. Prepare a trend analysis of Racine's efforts in last decade. Will also include initial housing data and analysis.	10	\$ 1250
Facilitate meetings or focus groups with key stakeholders, service practitioners, housing specialists, other funder groups.	20	\$ 2500
Compile findings and suggestions from research and focus group(s). Conduct analysis of all data and input. Prepare summary of findings from data and existing assessments regarding needs, existing activities and services, and proposed goals, objectives and priorities in these areas: housing, homeless, non-homeless/special needs, and community development. Research and provide a housing market analysis as required by Con Plan regulations. Identify gaps in housing, support services and prevention services. Integrate with results of prior citizen participation actions and trends analysis.	40	\$ 5000
Draft and submit recommendations for Strategic Plan including goals, objectives and activities in chart format and submit to DCD for review and comments.	10	\$ 1250
Develop and provide to DCD specific recommendations for HOME activities and funding for 2010 and beyond.	10	\$ 1250

Develop draft Consolidated Plan and Annual Plan executive summary, narratives and tables. Will include data tables and draft narratives for Consolidated and Annual Plans.	20	\$ 2500
Present draft Plans to DCD for review, comments and determination of additional information necessary or revisions desired. Develop final Plans including updates or revisions to final narratives and tables based upon additional findings, data or comments.	20	\$ 2500
Present final Plans and recommendations for future actions and considerations to Community Development Committee, City Council and/or Mayor.	8	\$ 1000
Provide final Plans to Director in electronic CPMP format and hard copy. Follow up with final report for City staff including recommendations for future actions and activities in regard to planning and execution of CDBG, HOME, ESG, homeless and other community development.	6	\$ 750

C. Total Hours and Estimated Cost

174 hours X \$ 125.00 per hour = \$ 21, 750

D. Travel Costs Estimate

\$ 1,072

E. TOTAL ESTIMATED COST

\$ 22, 822

(The standard rate for U-CPDA is \$ 125.00 per hour)

F. Timetable

Begin: March 1, 2010. Complete: June 15, 2010.

G. Measureable Outcomes/Deliverables

- Data tables and draft narratives for HUD Consolidated plan including 1A, 1B, 1C, 2A, 2B, 2C, 3A, 3B and 3C or equivalents. Will include: Housing Needs assessment and housing market analysis; required homeless inventory, needs and strategies; racial, ethnic, low-income descriptions and disproportionate need analysis; Anti-Poverty Strategy; Barriers to Affordable Housing narrative; Institutional Structure, Coordination and Monitoring narratives and other elements if necessary.
- Analysis of Racine's plans, progress, and trends.

- Summary of observations and comments from participants in data gathering and meetings to comply with Citizen Participation and Consultation requirements.
- Final compilation report.

H. Qualifications

The Consolidated Plan and Annual Plan for Racine will be developed by Community Planning and Development Advisors LLC (CPDA) in partnership with Urban Strategies, Inc.

Community Planning and Development Advisors, LLC (CPDA) is a community development consulting firm with primary expertise in the administration and management of CDBG, HOME and other HUD programs. Its principals include a former HUD Community Development Division Director, Bob Berlan, Senior CDBG and HOME Program Representative, Marcia Bergeson, and a long time manager of one of the country's most recognized, successful and innovative community development programs, Madison, Wisconsin, Hickory Hurie. The three principals of CPDA are thoroughly knowledgeable and experienced in the administration of CDBG and other HUD housing and community development programs.

CPDA, in partnership with **Urban Strategies (US)**, recently completed Consolidated and Annual Plans for Waukesha County, Wisconsin, the City of Kenosha, Wisconsin, and the City of Aurora, Illinois. Additionally, **US-CPDA** provided assistance to the Cities of Appleton and Kenosha, Wisconsin, during the development of the Con Plans and Annual Plans. This included extensive consultation activities as well as analysis and recommendations for goals, objectives, strategies and activities. **US-CPDA** also recently completed an extensive review and analysis of the homeless programs and strategies of the Waukesha County, Wisconsin, homeless Continuum of Care. Currently, **CPDA** is providing technical assistance and assessments nationwide on the Neighborhood Stabilization Program (NSP) as a subcontractor for two of HUD's major national technical assistance providers.

Urban Strategies (US) is a full service strategic communications and enterprise development firm providing services to businesses and corporations, foundations and nonprofits and government agencies. It is recognized for its expertise in intergovernmental relations and nonprofit development and management as well as its ability to problem solve and provide ongoing technical assistance. **Urban Strategies** has been a Community Development Technical Assistance (CD-TA) provider for the U.S. Department of Housing and Urban Development (HUD) in Wisconsin for CHDO (Community Housing Development Organization) and HOME Investment Partnerships Programs. It has provided direct managing and consulting with CDBG and HOME-funded organizations over the last 10 years. The principals of Urban Strategies are Jim Milner and Karen Gotzler.

The principals of CPDA are Bob Berlan, Marcia Bergeson and Hickory Hurie.

- **Bob Berlan** was director of the Community Planning and Development Division of HUD's Milwaukee Office for ten years overseeing CDBG, HOME, Homeless and other programs from 1998 to 2008. His office was recognized for its program expertise and management, strong and positive relationships with clients including cities, counties, and the state, as well as non-profits. Prior to moving to Milwaukee 1998, Bob was Program Manager for affordable housing programs in the Chicago HUD office.
- **Marcia Bergeson** was a Senior CPD Representative in the Milwaukee Office for twenty years. She is considered an expert in CDBG, HOME and technical assistance. She was the office's CDBG and HOME Coordinator. She was also an expert in CPD's electronic management systems including IDIS (the Integrated Disbursement and Information System) and the new CPMP tool (Consolidated Plan Management Plan), which is an electronic submission system for the Consolidated Plan, Annual Plan and CAPER (Consolidated Annual Performance and Evaluation Report).
- **Hickory Hurie** recently retired from the City of Madison, WI, where he served as manager of community development programs for 28 years. Madison's CDBG and HOME programs are nationally recognized for their impact, progress and management. HUD often used Madison's programs as Best Practice examples for national recognition and training. He co-chaired a Department of Housing and Urban Development team that developed recommendations to establish an electronic-based comprehensive planning and reporting system for over 1,100 cities nationwide. He is a Certified City Planner having earned his AICP from the American Planning Association.

The principals of **Urban Strategies (US)** are Jim Milner and Karen Gotzler.

- **Jim Milner** has more than 30 years of experience in Communications and Workforce Strategies. Jim has an MBA with a focus on Human Resource Management and a BA/BS in Leadership, Organizational Development, and Communications. Certified as a Board Development Consultant with national BoardSource, and as a Community Action Professional, Jim is the President & CEO of Urban Strategies. Jim created a network of consultants who serve as coaches and technical assistance providers to for-profit and nonprofit corporations and government agencies. Jim's expertise includes: enterprise management planning, developing systems that support the implementation of internal and external Customer Relationship Management (CRM) strategies and Human Resource (HR) compliance. He was a senior manager for Social Development Commission for 6 years and worked for the Wisconsin Department of Workforce Development in the 1990s. Jim is a member and trainer for the Society for Human Resource Management, a member of the National Association of Black MBA's, Milwaukee's Downtown Rotary International Club and its Diversity Committee, and the

Alliance for Nonprofits.

- For over 30 years, **Karen Gotzler** has worked with business, government and nonprofit organizations and coalitions. Karen, Urban Strategies' COO, served on the Core Team for The Denali Initiative, a national social enterprise development project. She continues to teach at UWM School for Continuing Education and consult around the country on social enterprise and nonprofit income diversification. Karen is a certified Economic Development Finance Professional (EDFP) through National Development Council (NDC). In addition, she is a certified administrator for the Intercultural Development Inventory (IDI). While President and CEO of the Urban Economic Development Association of Wisconsin, Karen led a membership and provided technical assistance and program evaluation in affordable housing, commercial revitalization, neighborhood development and workforce concerns. As an Economic Development Consultant for the State of Wisconsin in the 1990's, she developed a revolving loan fund program for CBO's lending to small businesses. Karen also has extensive business ownership experience from the 1980's.

Urban Strategies staff participating:

- **Monica Wauck** serves as Research Manager at Urban Strategies. Monica targets data collection to add value to projects, using a broad array of primary and secondary sources; designs project approaches; and develop recommendations and strategic implementation plans for clients. At Urban Strategies, Monica has worked on data collection for the Waukesha County Consolidated Plan, performance management for workforce development agencies, and facility studies for a number of local nonprofits. Before joining Urban Strategies, Monica worked at two local planning and engineering firms, working on economic development, transportation, and comprehensive planning projects for communities all over Wisconsin. Monica holds a Masters in Urban Planning for the University of Wisconsin-Milwaukee and a Bachelors degree in History from Centre College.