

Attendees:

- Keri Williams (*WSHFC*)
- Tevin Medley (*The Athena Group*)
- Rhiannon Colaci (*The Athena Group*)
- Bilan Aden (*ACHD*)
- Troy Drawz (*Imagine Housing*)
- Loren Tierney (*HDC*)
- JoAnna Martin

Agenda:

- Revisit Community Agreements
- Check-ins
- Review what we have learned
- Our “why” and CBO engagement recap
- Your feedback

Meeting Notes:

- Community Agreements:
 - Listen with curiosity and willingness to learn.
 - Do what you need to show up fully.
 - Resist the desire to interrupt.
 - Speak from your own story and use “I” statements.
 - Avoid speaking for another individual or group.
 - Be open to the wisdom in each person’s story.
 - Not everything will be comfortable to discuss.
 - Include African Languages
 - Anything to add?
- HDC Announcements:
 - Quarterly member meeting Sept 20th- Race equity goals
 - Approval for advocacy agenda and populating the calendar with “Lunch and Learn’s”
- Athena shared presentation slides: “WSHFC and HDC CBO Affinity Group Presentation August 2024” (PDF’s and link references below)
- Input from the group on presentation slides by slide title:

○ **Slide: “Our “why” and Engagement Recap”**

Group input/feedback-

- WSHFC looks back on the past year and policy minor/clean-up revisions this last summer, there was a request from colleagues regarding feedback on specific points in the policy from CBO’s. WSHFC acknowledged that this engagement over the last year has been focused on the “Why”, to establish trust and relationships among the attendees. Lots of listening and learning why CBO’s exist and who they’re serving. This led to continuation of this engagement to now get to specifics of the policy with these CBO’s. This point in the project, and presentation on 9/12, is another reset to now start that process.

○ **Slide: “CBO Recommendations, Ideas and Opportunities- 1. Definitions of Communities Harmed by Housing Disparities, and Community Based Organizations”**

Group input/feedback-

- Member Question - “Consider establishing a CBO advisory board to support the evaluation process” is it regarding when someone has applied for funding? And evaluation criteria on whether or not a CBO is a CBO? How this application and package being presented is truly representing community? Is that what is meant by evaluation?
 - WSHFC – The understanding is that, yes. First year that policy was implemented, there was written materials submitted as evidence of CBO relationship to community but found it was cut and pasted and in some cases that CBO didn’t know they were being cited. That is why this process was moved to an interview form instead.
- Members contributed an appreciation for the idea of a CBO Advisory board. Being a part of this process for a long time, there is an awareness of “who is who”, community work and organizing requires relationship building so having this board will be very helpful.
- Suggestion for compensation for CBO Advisory Board

○ **Slide: “CBO Recommendations, Ideas, and Opportunities- 2. Incentives for Developers to Partner with CBO’s”**

Group input/feedback-

- WSHFC contributed that they’ve developed a document that is called “Promising Practices for Partnerships” which was developed by using an analysis of all the partnerships WSHFC has seen so far such as:
 - Contents of their MOU’s
 - Contents of descriptions of how they practice Community Engagement
 - Extrapolated from that; examples of exemplary projects that have been approved. Will be presented to a few volunteers to get feedback.

- **Slide: “CBO Recommendations, Ideas and Opportunities- 3. Engagement of Communities Harmed by Housing Disparities”**
Group input/feedback-
 - WSHFC- There's been a note made on WSHFC' end regarding timing of the application point in time and not wanting to incentivize/require engaging with community and then the funding isn't provided. Could cause unintentional harm to communities.
 - The points in question are: At the point of application-
 - 1. What engagements should you have already done?
 - 2. How does WSHFC evaluate what you plan to do if there is no evidence of how you've done the engagement yet?
 - How does WSHFC ethically and morally incentivize if there is no assurance there will be a project or not.
 - Member echoes/sympathizes this issue regarding the timing of applications and funding of project and incentivizing developers for engagement with community but then the project isn't funded.
 - WSHFC - reason for employing policy around CBO's vs Communities was the idea that developers could go to CBO as the community experts. The CBO has the community's best interest in mind as far as housing locations, amenities needed, etc.

- **Slide: “CBO Recommendations, Ideas and Opportunities 4. Decision-making Power for CBO's”**
Group input/feedback-
 - Member expressed an appreciation for this slide: Will developer meet with CBO once a month? How specific can we get?
 - Developing a template could come out of this further discussion or potentially ask CBO's if they have their own templates to draw samples and co-create a template that can be used across the board

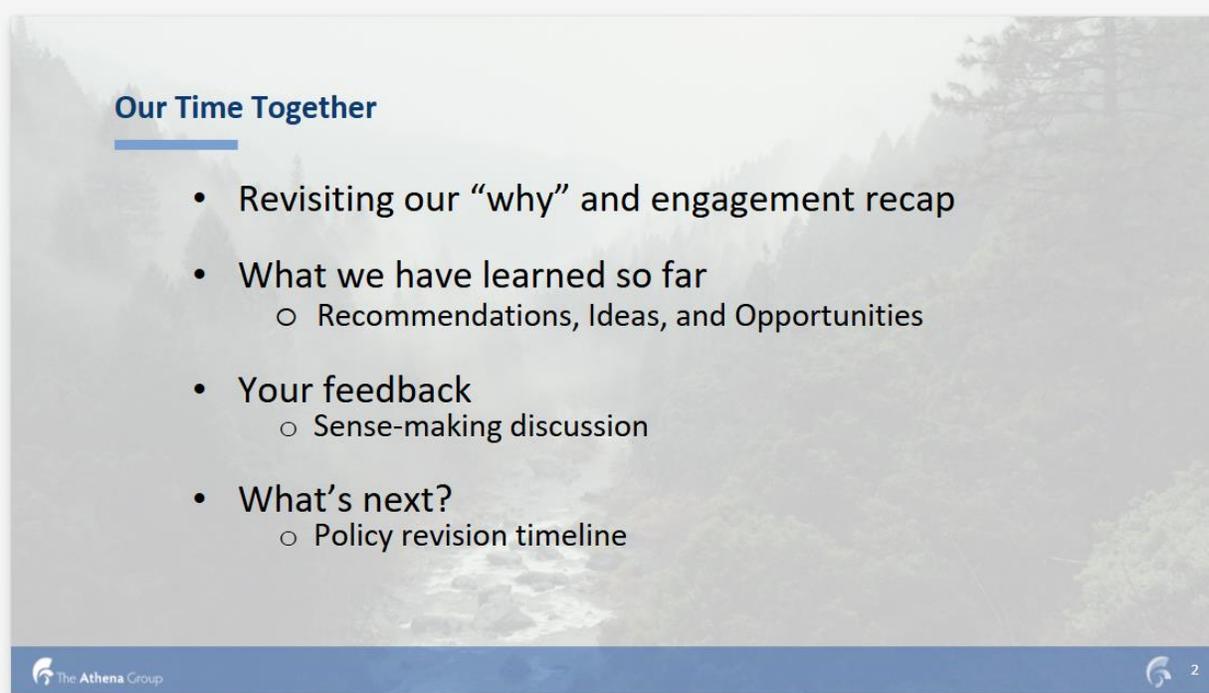
- **Slide: “CBO Recommendations, Ideas and Opportunities 5. Racial Equity in the Development Team”**
Group input/feedback-
 - WSHFC- “Implement systems to track and report...” Need to establish what racial equity goals are.
 - What things are measured to prove success?
 - What are the changes we are hoping to see? Especially for residence of color.
 - Policy was intended to have two goals with policy changes:
 - 1. Increase capacity and generate wealth for BIPOC organizations
 - 2. Improve the experience of living in affordable housing for BIPOC residents
 - Maybe we add a bullet to figure out metrics and establishing these equity goals
 - Member shared a story about CBO vs partner developer offers and the gap in information and needing a way to hold developers accountable so CBO's don't feel stuck accepting an offer from a developer.

- Outsider role idea: “Peer-to-Peer Mentoring” so that folks with experience can help those that are in their first negotiation with a partner developer
 - A suggestion to find a way to highlight partnerships that are stellar to show an example of a healthy partnership between developers and CBO’s, to celebrate them
- Maybe a task for the intended CBO Advisory Board is owning the ability to authenticate the racial identities of a BIPOC organization wanting to be a part of this process
- **Slide: “CBO Recommendations, Ideas and Opportunities 6. Capacity Building for CBO’s”**
Group input/feedback-
 - WSHFC plans to publish a new web page next week that has some of the info mentioned. Maybe the Advisory Group or a Subcommittee can help revise this webpage and the resources on it
 - WSHFC Announcement: Housing Washington Session on Wed Sept 25th- specifically regarding capacity building and developer/CBO partnerships
 - Member shares appreciation for the input and feedback
 - Member question- “Best Start for Kids” has funding set aside for experts to help with building capacity in areas such as HR, Finance, etc. There are consulting matchmaking process to receive help. Is there a mirror of this system for CBO and Developer consulting, does this resource exist?
 - WSHFC- No, not in the commission. It is an individual action. Maybe there is an approach for this in the form of grants or public funders hire a development consultant and keep them on retainer and assign them to work with CBO’s as needed at no cost to CBO.
- **Slide: “Additional Feedback”**
Group input/feedback-
 - WSHFC curiosity about first bulletin “...have access to relevant information throughout the project lifecycle”: what is the definition of relevant information? Let’s define this.
 - Member question on punitive measures:
 - Has developer fee come up in this talk about punitive measures if out of compliance? Maybe a step-up plan of measures, for example, one infraction is one measure, two infractions, so on so forth.
 - Member observation: regarding the commissions point scoring, points allotted later seems to turn into a requirement vs a point awarded. Maybe this tactic could be used in other places of the policy that was initially an incentive but then turns into a requirement.

Meeting Links:

Presentation Slide Deck: WSHFC and HDC CBO Affinity Group Presentation August 2024.pptx

Slide References:



Our “why” and Engagement Recap

The CBO Affinity Group was established to address long-standing disparities in affordable housing and to amplify the voices of historically marginalized communities. Engagement with Community-Based Organizations (CBOs) is driven by the following strategies:

- **Promote Racial Justice and Equity:** Ensure that affordable housing development is led by and serves Communities of Color, particularly those historically disenfranchised. This aligns with the WSHFC mission to rectify past injustices and create opportunities for equitable community development.
- **Empower CBOs in Decision-Making:** Strengthen the capacity of CBOs by providing them with decision-making power in housing development projects, thereby enabling them to advocate for their communities.
- **Facilitate Meaningful Community Engagement:** Engage communities harmed by housing disparities in the development process to ensure that housing projects meet their needs and reflect their values. This involves creating a platform where the community’s voice is the driving force behind development decisions.
- **Align Resources and Build Capacity:** Collaborate with public funders, philanthropic organizations, and financial institutions to align resources and provide technical assistance that supports CBOs in successfully utilizing programs like the Bond/4% Tax Credits. This is essential for fostering long-term sustainability and impact.

Our “why” and Engagement Recap

This journey with CBOs began in earnest in 2023, following a comprehensive policy reset in 2022 aimed at overcoming historical barriers in affordable housing. Key milestones in our engagement process include:

- **2022:** The policy reset focused on promoting projects “By and For Community,” guaranteeing a period of stability with no major changes for two years. This laid the groundwork for deeper engagement with CBOs starting in 2023.
- **2023:** The first formal CBO engagement meetings were held, marking the start of a structured dialogue with over 30 CBOs. These meetings, facilitated by The Athena Group, were crucial for defining key terms, such as “Communities Harmed by Housing Disparities” and what is a “Community-Based Organization,” and for identifying priority topics.
- **2024:** Engagement continued with a focus on refining policies and aligning them with the feedback from CBOs. This included discussions on racial equity in development teams, capacity building for CBOs, and the establishment of a clear and equitable process for CBOs to influence housing policies.
- **2025 and Beyond:** The insights gained from this engagement are informing major policy revisions scheduled for 2025, with the ultimate goal of ensuring that affordable housing projects not only serve but are shaped by the communities they are intended to benefit.

What have we learned so far? Characteristics of CBOs

<p>Community-Driven Mission</p> <ul style="list-style-type: none"> • CBOs are rooted in addressing specific local challenges like housing, health disparities, and racial inequities. • <i>We center the needs of children...actively addressing racial inequity.</i> 	<p>Advocacy and Representation</p> <ul style="list-style-type: none"> • CBOs amplify the voices of marginalized communities in decision-making. • <i>Our CBOs have intense power addressing inequities—their influence needs to be reflected in higher powers' decision-making.</i> 	<p>Focus on Equity and Social Justice</p> <ul style="list-style-type: none"> • CBOs are committed to addressing systemic injustices, especially racial equity. • <i>It is much deeper than what is offered by non-CBOs' definition.</i>
<p>Externally Supported Goals</p> <ul style="list-style-type: none"> • CBOs may have important partnerships demonstrating support for their work. • <i>...we have a national organization to provide us with technical assistance to help us with developer agreements.</i> 	<p>Long-Term Impact</p> <ul style="list-style-type: none"> • CBOs focus on sustainable, long-term community change and economic stability. • <i>A data metric should be about who financially benefits? How many move into homeownership?</i> 	<p>Collaborative and Inclusive</p> <ul style="list-style-type: none"> • CBOs have interest in, and value collaboration, peer mentoring, and capacity building. • <i>Peer mentoring group to provide advice. Folks who could be compensated for time to serve as a sounding board.</i>

CBO Recommendations, Ideas, and Opportunities

- The following recommendations, suggestions, and ideas have been gathered from a comprehensive series of meetings, discussions, and reports involving CBOs, developers, and other key stakeholders/careholders.
- These insights were shared during various engagements throughout 2023 and 2024, including CBO Spotlights, Share-Outs, and more formal reviews such as the JavaCapstone Final Report and the WSHFC Bond Policy Review.
- These collective inputs reflect the ongoing collaboration and commitment to creating equitable, community-driven development solutions. The following 44 points represent the diverse and impactful ideas that have emerged from this collaborative process mapped across WSHFC key topic areas.

CBO Recommendations, Ideas, and Opportunities

1. Definitions of Communities Harmed by Housing Disparities, and Community Based Organizations

- The definition of communities harmed by housing disparities should include a historical context that recognizes the long-term impacts of discriminatory policies and practices.
- The process should be inclusive, considering various factors such as race, ethnicity, income levels, and other social determinants of health that contribute to housing disparities.
- Streamline the process for qualifying as a CBO to reduce administrative burdens and better reflect the organization’s impact and community engagement.
- Instead of rigid criteria, allow CBOs to self-identify by providing narratives that describe their mission, goals, and the community they serve.
- The definition of a CBO should emphasize lived experience and community representation over formal criteria, recognizing organizations’ deep connections to the communities they serve.
- Consider establishing a CBO advisory board to support the evaluation process.

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CBO Recommendations, Ideas, and Opportunities

2. Incentives for Developers to Partner with CBOs

- Review and adjust the points system used in funding applications to better reflect the contributions of CBOs. This adjustment should ensure that developers who partner with CBOs gain meaningful advantages, particularly when the CBOs are deeply involved in the project's design and implementation.
- Establish a pool of development consultants that can be deployed to assist CBOs. These consultants, funded by organizations like WSHFC, could offer expertise to CBOs, making them more attractive partners for developers who may lack experience working with CBOs.
- Provide pre-development support to developers who commit to partnering with CBOs. This support could include funding for feasibility studies, community engagement activities, or capacity building for the CBO involved.
- Develop and disseminate clear guidelines and best practices for developers on how to effectively partner with CBOs. These guidelines should cover aspects like equitable negotiation practices, shared decision-making, and aligning project goals with community needs.

CBO Recommendations, Ideas, and Opportunities

2. Incentives for Developers to Partner with CBOs

- Make meaningful engagement with CBOs a criterion for receiving funding. Developers who demonstrate genuine collaboration with CBOs, such as involving them in decision-making and project design, should be prioritized for funding.
- Incentivize developers to offer post-project support to CBOs, such as ongoing technical assistance, training, or financial contributions. This ensures that CBOs can continue to build capacity and sustain their operations beyond the completion of a project.

CBO Recommendations, Ideas, and Opportunities

3. Engagement of Communities Harmed by Housing Disparities

- Developers should ensure that community engagement is meaningful and not just a checkbox activity. This involves engaging communities harmed by housing disparities early in the process and maintaining ongoing communication throughout the development cycle.
- Developers should be incentivized to engage CBOs to lead community engagement efforts, as CBOs are better positioned to understand and address the unique needs of the communities they serve.
- Implement a scoring system based on the level of engagement conducted by a CBO and/or developer partner. Higher scores should be awarded for more in-depth and inclusive engagement activities.
- Require developers to document their community engagement efforts, including the methods used and the feedback received from the community. This documentation should be reviewed and assessed as part of the application process.
- Ensure that communities harmed by housing disparities are actively involved in decision-making processes, not just in consultation. This includes having community members or CBO representatives on project boards or committees.

CBO Recommendations, Ideas, and Opportunities

4. Decision-making Power for CBOs

- Ensure that CBOs are represented on decision-making bodies such as project boards or committees. This representation is crucial for ensuring that decisions are informed by those who understand the community's needs.
- Develop policies that mandate shared decision-making power between developers and CBOs, particularly in projects that impact historically marginalized communities. This ensures that CBOs have an equal say in the direction and execution of the project.
- Use Memoranda of Understanding (MOUs) to formalize the decision-making roles of CBOs in development projects. These agreements should clearly outline the responsibilities and authority of CBOs to prevent any ambiguity or marginalization during the project.
- Provide capacity-building resources and technical assistance to CBOs to enhance their ability to participate effectively in decision-making. This support can include training, mentorship, and access to legal and financial expertise.

CBO Recommendations, Ideas, and Opportunities

5. Racial Equity in the Development Team

- Apply a racial equity lens when selecting developers for projects, evaluating how well their team composition and project approach reflect and address racial equity goals.
- Offer incentives, such as additional points or funding advantages, to development teams that demonstrate a strong commitment to racial equity through their team composition and project approach.
- Require development teams to undergo training on racial equity and inclusion as part of their qualification process. This ensures that all team members are equipped to understand and address racial disparities in housing.
- Implement systems to track and report on racial equity outcomes in development projects. This includes monitoring the racial composition of development teams and assessing the impact of projects on racial equity goals.
- Encourage and facilitate partnerships between BIPOC developers and CBOs to strengthen community ties and ensure that projects are led by those who have a deep understanding of the communities being serve.

CBO Recommendations, Ideas, and Opportunities

5. Racial Equity in the Development Team

- Increase access to funding for BIPOC developers to level the playing field and support more equitable participation in development projects. This could include targeted grants, low-interest loans, or other financial supports.
- Establish accountability mechanisms to ensure that development teams follow through on their racial equity commitments. This could include regular reporting, third-party audits, or penalties for non-compliance.

CBO Recommendations, Ideas, and Opportunities

6. Capacity Building for CBOs

- Offer ongoing technical assistance to CBOs to help them navigate complex development processes. This support could include legal advice, financial planning, and project management training.
- Create peer mentoring programs where experienced CBOs can offer guidance and share best practices with newer or less experienced organizations. This mentorship could be formalized and compensated to ensure sustained engagement.
- Provide or advocate for grants specifically aimed at building the capacity of CBOs, enabling them to participate more effectively in development projects. These grants could cover areas such as staff training, technology upgrades, and strategic planning.
- Create training programs tailored to the specific needs of CBOs. These programs should cover essential skills such as community engagement, financial management, and understanding housing policies and regulations.

CBO Recommendations, Ideas, and Opportunities

6. Capacity Building for CBOs

- Establish a centralized resource hub that CBOs can access for tools, templates, guides, and other resources necessary for effective project management and partnership development.
- Foster stronger collaboration between CBOs and developers by offering workshops, joint training sessions, and networking opportunities. This collaboration can help CBOs build the necessary relationships and skills to succeed in partnerships.
- Implement metrics to measure the effectiveness of capacity-building initiatives and adjust them based on feedback from CBOs. This evaluation will ensure that the support provided is meeting the actual needs of CBOs.

Additional Feedback

- Implement transparent and accountable processes in development projects, especially when involving public funds. Ensure that all stakeholders, including CBOs and community members, have access to relevant information throughout the project lifecycle.
- Develop and enforce clear compliance requirements for developers working with CBOs to ensure they meet their commitments and deliver the promised community benefits.
- Implement post-occupancy surveys to gather feedback from residents and CBOs after a project is completed. This feedback can be used to assess the project's impact and identify areas for improvement in future developments.
- Strengthen the relationships between CBOs and public funders by facilitating regular communication and collaboration. This can help align funding opportunities with the specific needs and goals of CBOs.
- Create a toolkit that provides CBOs and developers with resources and best practices for forming effective partnerships. This toolkit could include templates for agreements, guidelines for collaboration, and case studies of successful partnerships.

Additional Feedback

- Encourage flexibility in project planning to accommodate the unique needs and constraints of CBOs and the communities they serve. This might include flexible timelines, adaptable project scopes, and the ability to pivot based on community feedback.
- Acknowledge and actively address power imbalances between developers and CBOs in project partnerships. This could involve creating more equitable negotiation processes and ensuring that CBOs have the support needed to advocate for their communities effectively.
- Develop and implement equity-focused metrics to evaluate the success of development projects. These metrics should assess how well projects address racial and economic disparities and contribute to long-term community well-being.
- Investigate and implement innovative financing mechanisms, such as revolving loan funds or community investment funds, to support CBO-led development projects. These mechanisms can provide CBOs with more flexible and accessible funding options.