Community Development Alliance
Constituency Representative Expectations by Seat Type

Draft Revised to Address Constituency Seat Expectations and CDA Governance Framework
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Purpose and Governance Framework

CDA constituency representatives hold a dual responsibility. Each representative is a full member of the CDA Board of Directors and is therefore responsible for the fiduciary duties, preparation, participation, judgment, confidentiality, and collective decision-making expected of a board director. At the same time, each representative brings the perspective of a defined constituency into CDA governance and serves as a two-way connection between the Board and that constituency.

CDA's Governance bylaws states that the organization is governed by a Board of Directors with two representatives from each of six areas: Resident Advisory Council, Neighborhood Groups, Policy Organizations, Implementors, Operational Funders, and Housing Funders. The governance structure is intended to bring diverse Milwaukee perspectives together around CDA's mission of advancing racial equity by providing a quality, affordable home for every Milwaukeean, with the Board working to prioritize equitable homeownership for Black and Latino families.

The expectations below translate that governance structure into a consistent framework for constituency-designated seats while preserving the distinct contribution of each constituency.

The Six Constituency Seat Types

Seat Type	Constituency Represented
1. Resident Advisory Council	Milwaukee County residents participating through the Resident Advisory Council (RACH).
2. Neighborhood Groups	Neighborhood-based organizations, coalitions, and resident-serving groups connected to Milwaukee communities. (RON)
3. Policy Organizations	Organizations and leaders engaged in public policy, systems change, advocacy, research, and policy implementation.
4. Implementors	Organizations and partners that implement housing, homeownership, counseling, development, vacant-lot, or related strategies.
5. Operational Funders	Funders that support CDA's organizational operations, capacity, infrastructure, and/or broader community-development work.
6. Housing Funders	Funders whose resources directly support housing, homeownership, development, financing, or related housing strategies.

Guiding Principle

- · The constituency model is strongest when information and influence move in both directions: residents, organizations, professionals, funders, and other constituencies bring knowledge and

perspectives into the Board room, while the Board communicates decisions, priorities, and opportunities back to those constituencies.

- · The objective is a Board culture grounded in shared power, mutual respect, candid dialogue, transparency where appropriate, and collective responsibility—where no constituency is diminished because of its perceived rank, and no constituency is excluded because it lacks institutional or financial power.

Shared Expectations for Every Constituency Representative

- Fulfill all fiduciary and governance responsibilities of a CDA Board Director, regardless of constituency designation.
- Prepare for and participate consistently in Board meetings, committees, strategic discussions, and other responsibilities assigned to Board members.
- Bring informed constituency perspective to Board deliberations without treating the seat as a mandate to advance a private, organizational, or individual interest contrary to CDA's duties to the organization as a whole.
- Serve as a two-way liaison: listen to the constituency, surface relevant perspectives and concerns, and communicate finalized CDA decisions and relevant information back to the constituency.
- Support CDA's mission, racial-equity commitment, and focus on equitable homeownership while recognizing that Board decisions are collective decisions.
- Maintain appropriate confidentiality. Personnel matters, compensation, private individual information, pending or potential litigation, legal exposure, preliminary Board deliberations, draft positions, and active partnership/funding negotiations remain confidential unless the Board or authorized leadership determines otherwise. Finalized decisions and relevant strategic directions should be communicated back to the constituency.
- Identify conflicts of interest and follow CDA's applicable conflict-of-interest, recusal, confidentiality, and governance requirements. A constituency representative's role does not eliminate fiduciary duties to CDA as a whole.
- Help strengthen collaboration among CDA, residents, neighborhood organizations, policy partners, implementors, and funders.

1. Resident Advisory Council Representatives

Constituency: Residents represented through the Resident Advisory Council.

1. Purpose of the Seat

Ensure resident experience and resident-informed priorities are present in CDA decision-making, particularly where decisions affect housing opportunity, affordability, homeownership, neighborhood conditions, and community welfare.

2. Selection and Accountability

The representative should remain connected to the Resident Advisory Council and report back through appropriate resident-engagement channels. The representative's legitimacy comes from sustained resident engagement rather than simply individual experience.

3. Confidentiality vs. Communication

Keep Board-confidential matters confidential. Communicate finalized decisions, resident-relevant initiatives, and approved information back to residents in accessible language and formats.

4. Expectations and Responsibilities

- Regularly participate in RACH/resident engagement opportunities.
- Bring resident experiences, priorities, concerns, and emerging housing issues to Board discussions.
- Translate finalized Board decisions and CDA initiatives for residents.
- Encourage resident participation in CDA programs, committees, feedback opportunities, and leadership.
- Help CDA understand how policies and strategies are experienced at the resident level.

5. Boundaries and Conflicts

Advocate for resident perspective while exercising independent Board judgment and fiduciary responsibility. Personal or constituency interests should not be presented as binding instructions to the Board.

6. Term and Succession

Follow CDA's governing documents and Board-approved process for term length, renewal, appointment, and succession. If resident participation structures materially change, the Board should revisit how the seat is defined.

7. Seat-Holder Summary

This seat is different because it brings resident voice and lived community experience into governance while creating a direct pathway for residents to understand and respond to CDA's work.

2. Neighborhood Group Representatives

Constituency: Neighborhood groups, resident-serving organizations, and community coalitions connected to Milwaukee neighborhoods.

1. Purpose of the Seat

Ensure neighborhood-level conditions, priorities, resident concerns, and community-based knowledge inform CDA strategy and Board decisions.

2. Selection and Accountability

Maintain active relationships with the neighborhood organizations or coalition(s) the seat represents and create reasonable opportunities to gather and report community perspectives. The representative should be able to explain how constituency input is being surfaced without claiming that every individual or organization holds one identical view.

3. Confidentiality vs. Communication

Protect confidential Board information. Share finalized decisions, relevant CDA priorities, and approved information with neighborhood partners, using meetings, briefings, written summaries, or other appropriate channels.

4. Expectations and Responsibilities

- Maintain meaningful engagement with neighborhood groups and coalitions.
- Bring neighborhood trends, housing barriers, resident priorities, and community-based knowledge to the Board.
- Identify opportunities for CDA to collaborate with neighborhood organizations.
- Help connect CDA strategies to residents and community institutions.
- Share approved community data and evidence that can strengthen decision-making.

- Support community-informed advocacy and engagement consistent with CDA's mission.

5. Boundaries and Conflicts

Balance neighborhood priorities with CDA's organization-wide fiduciary responsibilities. Disclose potential conflicts when a Board matter directly affects the representative's organization or a partner organization.

6. Term and Succession

Follow CDA's governing documents and Board-approved appointment and renewal processes; revisit the constituency definition if neighborhood coalitions or representation structures materially change.

7. Seat-Holder Summary

This seat is different because it connects CDA governance to neighborhood-level realities, relationships, and community capacity.

3. Policy Organization Representatives

Constituency: Organizations and leaders engaged in policy, systems change, research, advocacy, and public-policy implementation relevant to housing and equitable homeownership.

1. Purpose of the Seat

Bring policy knowledge, systems-level perspective, and an understanding of the policy environment affecting CDA's mission and the communities it serves.

2. Selection and Accountability

Maintain an active connection to the policy constituency and communicate relevant CDA developments through appropriate organizational or coalition channels. The representative should distinguish personal analysis from an organization's formally adopted position.

3. Confidentiality vs. Communication

Keep confidential Board deliberations, legal matters, private information, and pending policy/partnership discussions confidential. Once a policy direction or Board decision is finalized, communicate the approved position accurately and without implying authority beyond the Board's decision.

4. Expectations and Responsibilities

- Monitor and bring relevant policy developments and systems-level trends to the Board.
- Help identify policy barriers and opportunities affecting affordable homeownership and racial equity.
- Connect CDA to appropriate policy, research, advocacy, and systems partners.
- Translate technical policy issues into information useful for Board deliberation.
- Support informed, lawful, community-aligned advocacy consistent with CDA's approved priorities.

5. Boundaries and Conflicts

Do not use the Board seat to commit CDA to an external policy position, coalition, or advocacy action without appropriate Board authorization. Follow conflict-of-interest and recusal requirements when applicable.

6. Term and Succession

Follow CDA's governing documents and Board-approved process; reassess the seat if the policy constituency or its relationship to CDA materially changes.

7. Seat-Holder Summary

This seat is different because it brings systems and policy expertise into governance while maintaining a clear distinction between constituency advocacy and the Board's collective authority.

4. Implementor Representatives

Constituency: Organizations and partners that implement housing, counseling, development, vacant-lot, homebuyer, or related CDA strategies.

1. Purpose of the Seat

Ensure that Board decisions are informed by practical implementation experience, service delivery realities, capacity constraints, and lessons from work with residents and housing systems.

2. Selection and Accountability

Maintain active engagement with the relevant implementor community and communicate appropriate CDA information back to implementation partners. The representative should bring implementation insight without representing the interests of one organization as the entire implementor constituency.

3. Confidentiality vs. Communication

Keep confidential active negotiations, personnel matters, legal issues, private client information, and preliminary Board deliberations confidential. Communicate finalized strategy, program direction, and implementation expectations when authorized and appropriate.

4. Expectations and Responsibilities

- Bring implementation experience, operational lessons, and barriers to Board deliberations.
- Identify opportunities to improve coordination among CDA and implementation partners.
- Help assess whether strategies can be implemented effectively and equitably.
- Share approved data and lessons from implementation that can improve CDA decision-making.
- Support alignment between Board strategy and implementation partners while respecting organizational independence.

5. Boundaries and Conflicts

Do not use the seat to secure preferential treatment, contracts, funding, referrals, or other benefits for the representative's organization. Disclose conflicts and recuse when required.

6. Term and Succession

Follow CDA's governing documents and Board-approved process; revisit the seat if CDA's implementation model or partner ecosystem materially changes.

7. Seat-Holder Summary

This seat is different because it grounds governance in the practical realities of turning housing and homeownership strategies into services, projects, and outcomes.

5. Operational Funder Representatives

Constituency: Funders supporting CDA's organizational operations, capacity, infrastructure, and broader community-development work.

1. Purpose of the Seat

Bring the perspective of organizations that invest in CDA's organizational capacity and long-term sustainability, while helping the Board understand funder expectations and stewardship considerations.

2. Selection and Accountability

Maintain a connection to the operational-funder constituency and communicate appropriate CDA information back to that constituency. The representative remains a CDA Director and does not act as a funding officer for the constituency.

3. Confidentiality vs. Communication

Keep confidential funding negotiations, prospective commitments, donor/funder information, Board deliberations, personnel matters, and other protected information confidential. Share finalized organizational priorities and approved information through appropriate channels.

4. Expectations and Responsibilities

- Bring knowledge of operational sustainability, capacity-building, and philanthropic/investment trends.
- Help identify opportunities for collaboration and diversified support.
- Ask questions that strengthen accountability, stewardship, and organizational sustainability.
- Support clear communication of CDA's mission, strategy, and approved outcomes to appropriate funder audiences.
- Help identify resources or partnerships without making commitments on CDA's behalf.

5. Boundaries and Conflicts

Funding relationships must not override fiduciary duty to CDA. Avoid preferential treatment, undisclosed conflicts, or using confidential Board information for a funder's private advantage.

6. Term and Succession

Follow CDA's governing documents and Board-approved appointment and renewal process; revisit the seat if the operational-funder constituency changes materially.

7. Seat-Holder Summary

This seat is different because it contributes a funder perspective on organizational sustainability while remaining accountable to CDA's mission and governance duties.

6. Housing Funder Representatives

Constituency: Funders whose resources support housing, homeownership, development, financing, or related housing strategies.

1. Purpose of the Seat

Bring housing-investment, financing, and resource-allocation perspective to decisions affecting CDA's housing and homeownership strategies.

2. Selection and Accountability

Maintain appropriate engagement with the housing-funder constituency and communicate finalized CDA priorities and relevant information back to that constituency. The representative should distinguish constituency perspective from any one funder's interests.

3. Confidentiality vs. Communication

Keep confidential pending funding negotiations, prospective commitments, proprietary information, private individual information, and preliminary Board deliberations confidential. Communicate finalized strategies and approved funding priorities appropriately.

4. Expectations and Responsibilities

- Bring knowledge of housing finance, investment, capital resources, and funding trends.
- Help identify opportunities to align resources with CDA's approved housing and homeownership strategies.
- Ask questions that strengthen financial sustainability, accountability, and equitable impact.
- Connect CDA to appropriate housing-finance and philanthropic resources when authorized.
- Support transparent, mission-aligned stewardship of housing resources.

5. Boundaries and Conflicts

Do not use the seat to obtain preferential access to CDA funding decisions, confidential information, projects, or counterparties. Disclose conflicts and recuse when required.

6. Term and Succession

Follow CDA's governing documents and Board-approved appointment and renewal process; revisit the seat if the housing-funder constituency or CDA's financing model materially changes.

7. Seat-Holder Summary

This seat is different because it brings housing-resource and financing expertise into governance while preserving CDA's independent fiduciary responsibility.

Cross-Cutting Rule: What Goes Back to the Constituency?

- Generally confidential: personnel matters; compensation; individual performance; pending or potential litigation and legal exposure; private information about donors, staff, clients, or constituents; preliminary Board deliberations or draft positions; and active partnership, merger, or funding negotiations.
- Generally shareable after finalization: Board decisions affecting the constituency; approved strategic directions or policy changes the constituency will be asked to support or implement; and general organizational updates relevant to the constituency.
- Default principle: confidential until appropriately finalized and authorized for communication. When uncertain, the representative should seek guidance from the Board Chair, appropriate committee/leadership, or designated CDA staff before sharing.

Creating a Safe and Level Space for All Constituencies

- CDA's constituency model should intentionally recognize and address the power dynamics that can exist among residents, funders, elected or public officials, nonprofit leaders, professionals, institutions, and other stakeholders. Titles, positions, access to resources, professional credentials, organizational authority, or funding relationships should not determine whose voice carries the most weight in Board discussions.
- The Board should strive to create a **safe, respectful, and level space in which every constituency can participate as an equal partner in the conversation.** This means intentionally reducing perceived rank and hierarchy at the Board table and creating conditions where residents and community members can speak candidly, ask questions, disagree respectfully, and contribute their

lived experience without feeling intimidated by individuals with greater institutional, professional, political, or financial power.

- The goal is not to eliminate the expertise or authority that Board members bring to the table, but to ensure that **expertise does not become hierarchy and resources do not become power over others.** Professional expertise, funding capacity, elected or organizational position, and lived experience should all be treated as valuable forms of knowledge that contribute to collective decision-making.
- · Board members should practice active listening, curiosity, respect, and shared accountability. When differences in power or access are apparent, the Board should intentionally create space for voices that may otherwise be less likely to speak. The desired outcome is a culture where people can say, "I may see this differently," without fear of dismissal, retaliation, or loss of standing.

Constituency Seat Commitment

A constituency-designated CDA Board seat is both a governance responsibility and a relationship responsibility. The seat-holder is expected to participate as a full Board Director while ensuring that a defined constituency's knowledge, experience, concerns, and opportunities are represented in the room. The seat-holder should listen outward, deliberate responsibly at the Board table, protect confidential information, communicate finalized decisions back to the constituency, and help build collaboration across residents, neighborhoods, policy organizations, implementors, and funders. In this way, constituency representation strengthens—rather than separates from—CDA's collective responsibility to advance racial equity and equitable homeownership.

Source and Drafting Basis

Primary governance source: Community Development Alliance, Governance page, housingplan.org/governance. The page identifies six constituency areas and states that the Board includes two representatives from each: Resident Advisory Council, Neighborhood Groups, Policy Organizations, Implementors, Operational Funders, and Housing Funders.

Constituency-seat framework: "Defining Constituency Board Seat Expectations," Phase 2 Action Item — First Draft Worksheet. The worksheet organizes seat expectations around seven areas: purpose; selection and accountability; confidentiality vs. communication; expectations and responsibilities; boundaries and conflicts; term and succession; and synthesis.

This draft preserves the seven-part framework from the worksheet and applies it across all six CDA constituency seat types. Where the provided sources do not specify a term length, nomination procedure, recusal rule, or formal reporting frequency, this draft intentionally refers to CDA's governing documents and Board-approved processes rather than inventing a requirement.