



CDA Board

2026 Q2

June 23, 2026

I. Election of David Bowen to CDA Board (10 min)

II. Executive Director Update (10 min)

III. Fundraising Policy (10 min)

IV. 2025 Audit (20 min)

V. Governance Conversation (1 hour)

VI. Consent Agenda (5 min)

A. Approval of March 24, 2026 Minutes

B. Approval of Q2 2026 Financial Statements

VII. Adjourn



- Executive Director, Wisconsin Voices
- Policy Council representative
- Former County Supervisor, State Representative, Lobbyist for ARPA

David Bowen is elected to the CDA Board for a term of two years, commencing June 23, 2026 and ending June 22, 2028.

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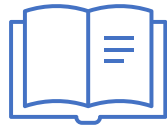
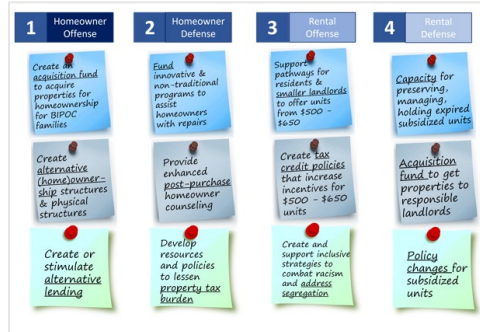
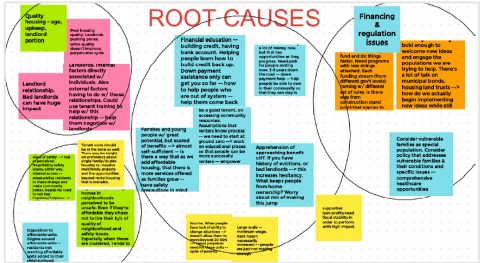
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Collective Objectives



Grow homebuyer counseling & down payment assistance (DPA)



Acquisition Fund to combat predatory acquisition



Vacant Lots to 1st Generation Homes



Alternative lending based on rental history and 40 – 60% DTI



Policy to protect families vulnerable to displacement.



Annual Objectives & Key Results

	2022	2023	2024	2025	2026
Grow Down Payment Assistance & Homebuyer Counseling by 10%/Year	Build System to track	Set Baseline: 765	863/841	986/926	1,018
Vacant Lots to Entry Level Homes: develop a sustainable system of 100 new homes per year	Baseline: 20	42/40	59/60	78/80	100/year
Acquisition Fund: develop a sustainable system to acquire 100 homes per year	Build and Fund new system	Set Baseline: 40	89/60	38/80	100/year
Alternative Lending: develop a sustainable system to lend to 200 families per year on the bench		Develop Business Plan	36	37	38
Policy to protect families vulnerable to displacement.			Collaborate on H.B.O.R	Develop Phase I H.B.O.R	Implement Phase I H.B.O.R.

COLLECTIVE AFFORDABLE HOUSING OKRS: 2026 Q1



	Grow DPA	Acquisition Fund	Entry Level Homes	Alternative Lending	Policy to protect vulnerable families
Long Term Goal	Grow Down Payment Assistance (DPA) & Homebuyer Counseling by 10% each year for 5 years	Acquire 100 single family homes and duplexes every year that would otherwise be investor owned and sell to homeowners	Construct 100 entry level homes on vacant lots every year	Create a local lending pool that lends to first time homebuyers based on rental history	Continued evaluation of displacement threats and the development and implementation of policy to protect families vulnerable to displacement.
Q2 OKR Update	<ul style="list-style-type: none"> ✓ 2026 Place Based DPA Requests ✓ 2nd Round of Capital One Grant 	<ul style="list-style-type: none"> <input type="checkbox"/> Complete Northside Initiative I sale to Acts 	<ul style="list-style-type: none"> ✓ Submit Amani TID Application ✓ Location of 2027 TID <input type="checkbox"/> Model pipeline for \$20K - \$30K <input type="checkbox"/> Lender for Amani TID 	<ul style="list-style-type: none"> <input type="checkbox"/> Establish Lender's Council 	<ul style="list-style-type: none"> ✓ Policy Council Launched ✓ Policy Website updated <input type="checkbox"/> City and County legislation introduced <input type="checkbox"/> Hire Lobbyist <input type="checkbox"/> Reporting Process
Proposed Q3 OKR	<ul style="list-style-type: none"> <input type="checkbox"/> Protection of DPA in City budget <input type="checkbox"/> Additional place-based requests <input type="checkbox"/> Award of Capital One Grant 	<ul style="list-style-type: none"> <input type="checkbox"/> Complete Northside Initiative I sale to Acts 	<ul style="list-style-type: none"> <input type="checkbox"/> Amani TID Approved <input type="checkbox"/> Launch of MLW TID Project Team <input type="checkbox"/> Lender for Amani TID <input type="checkbox"/> Model pipeline for \$20K - \$30K 	<ul style="list-style-type: none"> <input type="checkbox"/> Launch joint MMAC Initiative 	<ul style="list-style-type: none"> <input type="checkbox"/> City and County legislation introduced <input type="checkbox"/> Hire Lobbyist <input type="checkbox"/> Reporting Process



	Communications	Resident Collaboration	Org. Structure & Financial	Legal	Data
Long Term Goal	Excellent communication with residents, practitioners and funders	Continuous Resident Collaboration	An organizational structure and budget that positions CDA to maximize collective action in housing.	Excellent legal support to guide complicated policy analysis.	Excellent data to guide strategy
Q2 OKR UPDATE	<ul style="list-style-type: none"> ✓ Bus Tours ✓ Story Telling session ✓ Finalize and Promote Impact statement <input type="checkbox"/> Update Foundational messaging 	<ul style="list-style-type: none"> ✓ RACH Orientation/Retreat ✓ Launch 2027 TID engagement ✓ Advance Section 8 to homeownership work 	<ul style="list-style-type: none"> ✓ 2025 Audit Complete ✓ Advance Governance work <input type="checkbox"/> Advance Orientation work ✓ Launch Close one Open one campaign 	<ul style="list-style-type: none"> ✓ Draft Membership Transfer Agreements 	<ul style="list-style-type: none"> <input type="checkbox"/> Beta #2 Displacement Data ✓ GIS Instructional Session ✓ Amani Maps ✓ HBCA Data collection
Proposed Q3 OKR	<ul style="list-style-type: none"> <input type="checkbox"/> Annual Conference <input type="checkbox"/> Update Foundational messaging 	<ul style="list-style-type: none"> <input type="checkbox"/> Launch of 2027 MLW Project Team 	<ul style="list-style-type: none"> <input type="checkbox"/> Launch MMAC Collab <input type="checkbox"/> Launch Public Investors Council <input type="checkbox"/> Governance Retreat <input type="checkbox"/> Advance Orientation work 		<ul style="list-style-type: none"> <input type="checkbox"/> Beta #2 Displacement Data

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The Board adopts the Fundraising portions of the Board Commitment template.

Community Development Alliance Individual Board Member Commitment Plan

Board Member Name: _____

The vision of CDA is to advance racial equity, by providing a quality affordable home for every Milwaukeean. This vision has inspired me to join the CDA Board and make the following commitments:

I. Participating in CDA Events

- ✓ I will attend and participate in CDA Board Meetings
- ✓ I will attend CDA All-Allies Quarterly meetings, or review the recordings
- ✓ I will attend CDA's pre-conference seminar, or review the recordings
- ✓ I will attend CDA's Annual Conference
- ✓ I will attend other CDA events, approximately 1 per quarter, which in the past have included: Spring Bus Tour, Holiday Party, Mural Unveiling, etc.

II. Ambassador for CDA Efforts

[TBD]

III. Liaison with Ally Sector

[TBD]

IV. Personal Gift

The CDA Board is intentionally filled with a wide variety of allies who may have very different personal financial resources. Many grant applications require that CDA disclose its percentage of Board Giving, but do not require a dollar amount. Our goal is 100% board participation, therefore, all amounts are appreciated, even if it is \$1. As always, CDA will be great stewards of any amounts given.

✓ I will personally contribute \$ _____ on a monthly/annual (circle)

Contributions should be made through the donor portal at: [CDA | Donate](#)

www.housingplan.org/donate, or through a workplace campaign utilizing payroll deduction

V. Fundraising

- I will help steward relationships with **current or lapsed** donors through personalized letters, telephone calls, electronic messages, hosting a party or personal visits (circle all that apply)
- I will help cultivate relationships with **prospective donors identified by staff** through personalized letters, telephone calls, electronic messages, hosting a party or personal visits (circle all that apply)
- I will personally approach** prospects I have cultivated to ask for a gift.
- I will introduce** the Chief Alliance Executive and Philanthropy Director to people from my circles of influence so that those staff can ask for a gift.
- I have access to the following club, organization, spiritual group, employee group, fraternal association, professional association, trade union, or subscription list that I will work with CAE to make a presentation with the goal of asking for a gift:

- I have contacts with the following corporations and foundations that I will work with the CAE to get meetings with the goal of asking for a **financial gift**.

- I have contacts with the following corporations that I will work with the CAE to get meetings with the goal of asking for **in-kind goods or services**.

- I have the following skills or non-financial resources that I would like to contribute to CDA's efforts.

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- *The CDA Board accepts the audit presented at the 6/23/26 Board meeting and authorizes Chief Alliance Executive (CAE) and CDA Board Chair, Vice Chair/Treasurer to execute documents required to complete the audit and file appropriate tax returns and other documents.*

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CDA Board Governance

What We Heard: Phase 1 Findings

Stakeholder Interview Synthesis | June 23, 2026

Presented by Samantha Maldonado, Chaska Consulting

About This Process

11

Board Members
Interviewed

6

Core Themes
Identified

Between May 14–June 16, 2026, Chaska Consulting conducted confidential one-on-one governance assessment interviews with CDA board members representing all constituency groups: residents, funders, coalition representatives, and emerging developers. All scheduled interviews are now complete.

All interviews were treated as confidential. This presentation reflects synthesized themes — no individual is identified by name.

Resident Leaders/Advisory

Funders

Homeownership
Implementor

Policy/Advocacy

Investors

What We're Hearing

The overarching message across all interviews is consistent:

"CDA has a strong foundation and the right people, now it's time to build the structure that lets this board lead with intention."

✓ Real Strengths

Trust in Teig's expertise, collaborative culture, diverse representation, mission alignment

△ Clear Tension

Fast-paced decisions vs. the board's need for deliberation, preparation, and genuine governance ownership

→ Shared Vision

Every member wants the same outcome: more structure, clearer roles, and a board empowered to lead

Governance Structure & Role Clarity

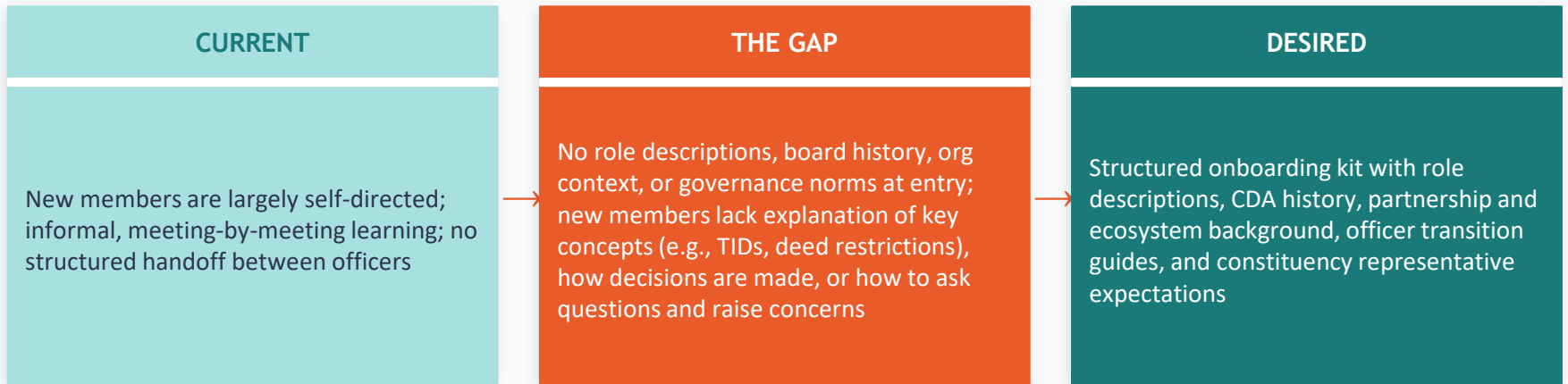
What We Heard

- ▶ The board lacks a clear governance structure with defined roles and responsibilities
- ▶ The line between board governance and Teig's operational role is blurry across all constituencies
- ▶ Board members often feel reactive — asked to approve rather than lead
- ▶ The board chair role lacks clear authority, support, or agenda-setting ownership
- ▶ Decision-making protocols (consensus vs. vote) are undefined

Opportunity

- ▶ Develop and adopt a Board Governance Framework with defined roles for all officer and constituency seats
- ▶ Create clear documentation distinguishing governance from operations
- ▶ Establish board-led agenda-setting and executive session protocols
- ▶ Adopt a decision-making policy (consensus vs. vote guidelines)
- ▶ Establish a Governance Committee to lead board development, onboarding, and decision-making structure

Onboarding, Orientation & Board Development



Voices Across Constituencies

Community leaders report feeling underprepared and sometimes intimidated by professional members. **Executive committee roles** had no officer transition guidance. **Coalition reps** are unclear on constituency expectations. Funders note that new members have no opportunity to build relationships with existing members before formal meetings begin. Long-tenured members recommend proactive board composition reviews to ensure expertise in legal, financial, and marketing areas as CDA grows. All constituencies see structured onboarding as a high-priority need.

Meeting Effectiveness & Decision-Making

Patterns Heard Consistently

- ▶ Quarterly cadence is too infrequent for the volume and complexity of the work
- ▶ Meetings are presentation-heavy with too little time for discussion or deliberation
- ▶ Materials often arrive too late for meaningful preparation
- ▶ Resolutions often arrive pre-written for approval; agendas are pre-planned with little board input, executive sessions are not standard practice
- ▶ Evening meetings (5–7pm) cause fatigue and reduced engagement
- ▶ High abstention rates signal discomfort or insufficient information, not necessarily agreement
- ▶ Members want a two-meeting deliberation model: introduce major items for discussion at one meeting, vote at the next

Two Incidents That Surfaced the Pattern

ED Evaluation Process

Brought to the board without a clear framework, timeline, or board-led protocol, felt rushed and unclear.

Employee Down Payment Proposal

An individual benefit request presented for rapid board approval without defined policy context raised concerns about process and precedent.

CAE Evaluation & Board Accountability

There is genuine, widespread trust in Teig's subject-matter expertise and commitment to CDA's mission. That trust is an asset, and a reason to get this right.

Current State

- No formal, board-led evaluation process in place
- Prior evaluations have been ad hoc
- Board has little ownership of the review process

The Dynamic

- Speed of execution = strength and friction point
- Board wants to support, not micromanage Teig
- New members have less context; trust is still building

What Members Want

- A structured, annual evaluation led by the board
- Mission-aligned criteria, not just operational metrics
- 360-degree input: board, staff, collaborators

The Ask From Members

- Formalize a board-led evaluation calendar
- Provide contextual benchmarks (peer orgs)
- Multi-stakeholder evaluation process, not just internal surveys or net promoter scores

Constituent Voice & Community Engagement

What's Working

- ✓ Resident council seats are a meaningful structural commitment
- ✓ Strategic Action Sessions with lived-experience community members
- ✓ Public posting of meeting materials shows commitment to transparency
- ✓ Coalition representation ensures multiple sectors at the table
- ✓ Stipends and equitable access to training opportunities recognized as positive

Where Growth Is Needed

- △ Resident council input is perceived to sometimes validate decisions already made, rather than to shape them; authentic representation requires structural independence.
- △ Ongoing resident leader onboarding to ensure fresh community voices are integrated into the board.
- △ No structured debrief process for major initiatives (e.g., Amani TID, ECE homes) demonstrating feedback is not documented or incorporated into future planning
- △ Partner organizations feel CDA takes credit for collective achievements without adequate recognition, creating reluctance to engage candidly
- △ Community beyond north side (Latino, Indigenous, LGBTQ+, seniors) needs more intentional inclusion
- △ Capacity barriers: Complex materials, meeting times, and multiple jobs may limit participation.

Board Culture, Communication & Mission Voice

Culture Strengths

- Collaborative and generally trusting climate
- Members are passionate and well-qualified; candid perspectives exist but surface offline rather than in formal board meetings
- Shared passion for housing mission and community impact
- Diversity of professional backgrounds seen as strength

Communication Gaps

- Board lacks shared language and messaging for CDA externally
- Partner org contributions are underrecognized in CDA communications
- Information flow between the board and constituencies is inconsistent
- Institutional history is undocumented, creating 'memory' gaps

Culture Challenges

- Funder/power dynamics create unspoken pressure for some members
- Limited bonding outside meetings reduces depth of trust
- High turnover in board chair creates continuity gaps
- Board members often seek direction from the CAE rather than asserting governance authority; talents and perspectives of members are underutilized
- Newer members may hesitate to dissent due to the weight of decisions impacting thousands of community members, requiring intentional development support

Opportunities

- Develop communication toolkit for board members as ambassadors
- Build in structured bonding/relationship time (retreats, mixers)
- Establish succession planning and leadership pipeline
- Document CDA's organizational history for continuity and onboarding

Recommended Priorities for Implementation

1

Board Governance Framework

Near-Term

- Governance & operations role clarity document
- **Decision-making protocol (consensus vs. vote)***
- Board chair authority and agenda-setting process
- Establish Governance Committee for board development and decision-making
- Executive session practice established

*Board/staff co-created

** TBD

2

Structured Onboarding Program

Near-Term

- Onboarding kit: CDA history, roles, expectations
- **Officer transition guide**
- **Constituency rep expectations by seat type***
- Board composition and member bios accessible
- Proactive expertise gap assessment (legal, financial, marketing)

3

Meeting Structure Reform

Mid-Term

- Expand to 5–6 meetings/year; pilot two-meeting deliberation model (discuss/vote cycle)
- Materials distributed 2 weeks in advance
- Agenda redesigned: fewer presentations, more discussion (e.g. budget/initiatives, etc.)
- Morning or daytime meeting options explored

4

CAE and Board Evaluation Process

Mid-Term

- CAE:
- Board-led annual evaluation calendar
 - Peer-org benchmarks included**
 - 360 review process piloted**
 - **Mission-aligned evaluation criteria developed**
- Board:
- Annual board self-assessment
 - Design, Administer, Analyze, Report, Action

5

Constituent Voice Infrastructure

Ongoing

- Formalize feedback loop between board and resident groups for authentic community input and buy-in
- **Clarify council/constituency seat expectations and deliverables**
- Improve accessibility and organization of board and organizational materials
- Expand community representation beyond current model



What We're Asking of This Board Today

01

Affirm the findings

Do these themes resonate? Are there perspectives or nuances we should name more clearly or adjust?

02

Confirm the priorities

Are these the right first moves? Which one or two feel most urgent to act on before the end of 2026?

03

Identify your champions

Who on this board will own each priority area? Governance improvements require board members as drivers, not just recipients.

04

Commit to a next session

Phase 2 will move from findings to frameworks, finalizing governance documents, evaluation tools, and the onboarding kit.

The Foundation Is Here.

Now Let's Build the Structure to Match.

Every person interviewed believes in CDA's mission. Every person wants this board to lead with greater clarity and confidence. The themes in this report are not criticisms, they are the board's own roadmap, in its own words.

Samantha Maldonado | Chaska Consulting

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- *The Board approves the consent agenda items.*

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