



Rural Affordable Workforce Housing Initiative

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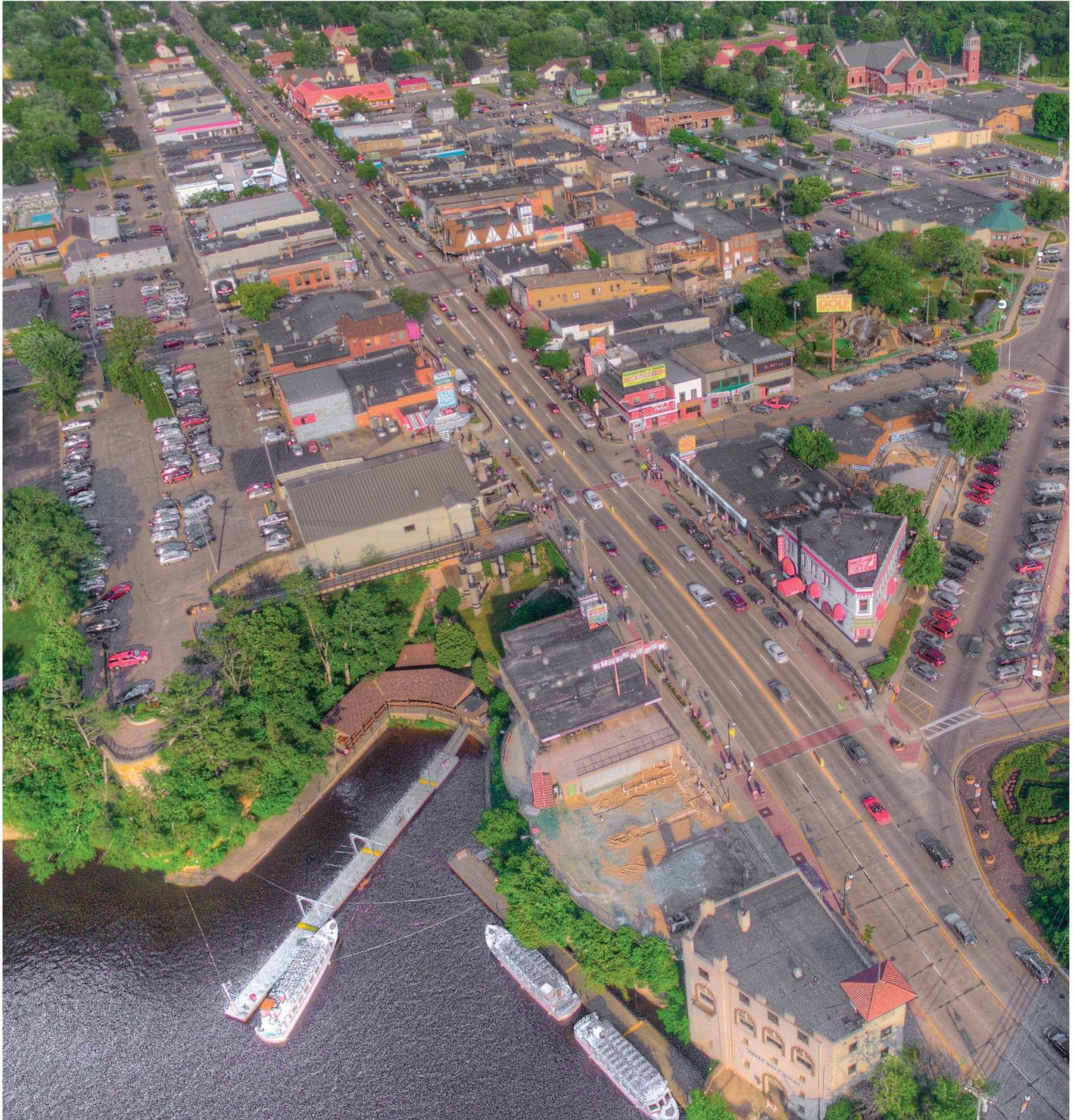
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WHEDA

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Throughout Wisconsin, rural communities are experiencing a shortage of affordable workforce housing. Finding solutions will be critical to the long-term health of manufacturers, agricultural producers, service providers and hospitality businesses such as those in Wisconsin Dells.

SUMMARY

If Wisconsin is to thrive, people need access to safe, affordable housing; businesses need skilled local workers; and communities need housing and businesses for a healthy tax base. To address these needs while setting the stage for long-term economic growth, the Wisconsin Housing and Economic Development Authority is launching a rural affordable workforce housing initiative.

“The participation of businesses, community leaders, housing providers, nonprofit groups and community members will be critical for success.”

The current shortage of rural affordable workforce housing can be traced to many factors. Participants at a series of statewide listening sessions organized by WHEDA have pointed to rising construction costs, limited developer interest due to the smaller scale of rural projects; aging housing stock; few affordable rental options; zoning; infrastructure challenges; and limited financing for new construction and renovation projects.

The \$10 million rural affordable workforce housing initiative, funded through WHEDA’s \$16.7 million 2019-20 Dividends for Wisconsin Plan and other funding sources, features a pilot effort to work with at least three rural communities as well as supplemental financing tools to overcome gaps in existing programs. Just as significant stakeholder input has informed the development of these efforts, the participation of businesses, community leaders, housing providers, nonprofit groups and community members will be critical for success.

WHEDA intends to implement the rural affordable workforce housing pilot and supplemental financing tools through:

- A pilot application process that generates participation representative of the diverse challenges facing Wisconsin’s rural communities;
- Outreach efforts that foster engagement among existing stakeholders and new collaborators;



- Identification of potential solutions to remove barriers to the development and rehabilitation of affordable workforce housing;
- Interdisciplinary partnerships that bring new resources and expand opportunities.
- The roll-out of a long-term rural affordable housing strategy with tactics that may be replicated for success in communities throughout Wisconsin; and
- Statewide use of supplemental financing tools resulting in construction of new affordable housing and rehabilitation of existing housing stock.

“It will take the commitment of many public, private and nonprofit partners working together to turn the tide on housing issues in rural communities statewide.”

While the rural affordable workforce housing pilot and supplemental financing tools were conceived prior to COVID-19, WHEDA’s innovative community engagement efforts during the pandemic provide options for engagement that can be tailored to local reopening plans. Beyond WHEDA’s investment in the adaptive process and technical solutions detailed in the plan that follows, it will take the commitment of many public, private and nonprofit partners working together to turn the tide on housing issues in rural communities statewide.



Communities need a mix of affordable single family and multifamily housing.



RURAL AFFORDABLE WORKFORCE HOUSING PILOT

By building a series of scalable solutions through a pilot process, WHEDA, the participating communities and all those engaged will create lasting and sustainable outcomes that address the rural affordable workforce housing challenge in our state. To accomplish this, WHEDA will employ methods that incorporate community engagement, partnerships and broad-based participation. While WHEDA staff members will bring expertise and knowledge in affordable housing and community development to the table, the experiences and perspectives of communities, partners and stakeholders will be critical for shared success.

A. Timeline

1. July 6, 2020 – statewide announcement of pilot plan and feedback opportunities on application process.
2. July 13, 2020 – WHEDA Webinar to introduce pilot concepts, gain feedback on the application process and discuss supplemental financing tools.
3. July 22, 2020 – application published.
4. Aug. 31, 2020 – applications due.
5. October 2020 – pilot community cohort announced / pilot process begins.

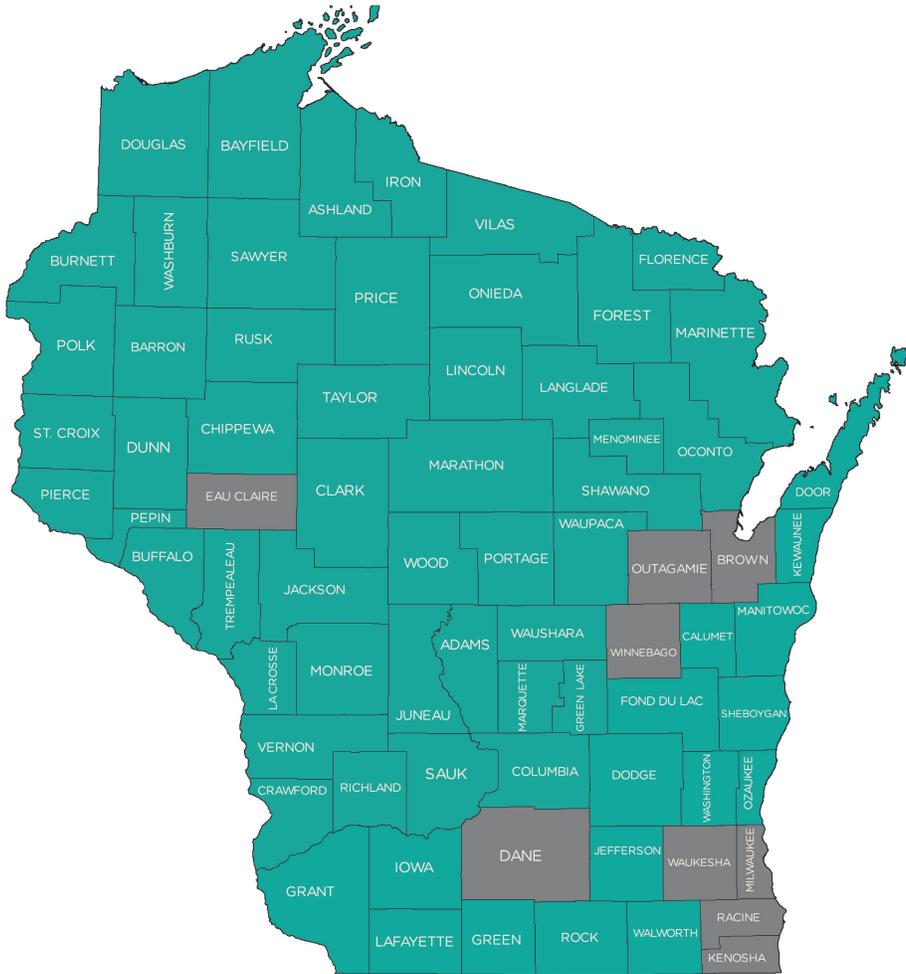
B. Application process and eligibility

At least three communities will be selected as participants in the rural affordable workforce housing pilot.

To be considered rural, a community must be within a

Many communities need affordable rental housing for working families.





**USDA Counties
More than 25% of
Population Rural by
USDA**

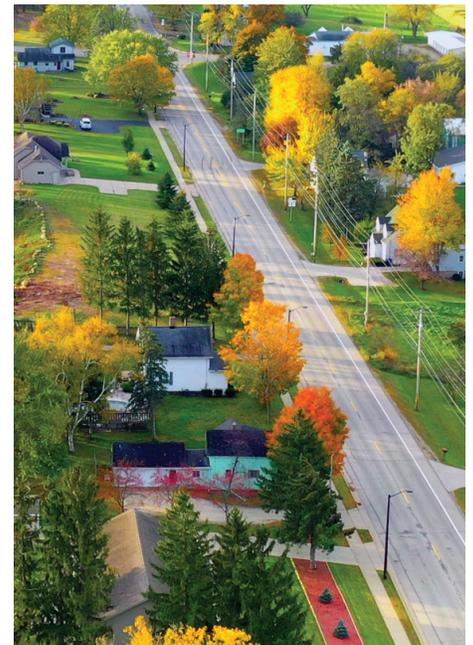


Left: Map of Wisconsin's counties. See **Appendix B** for larger map. Teal shaded counties are those considered a rural county under the Rural Workforce Housing Pilot. To be considered rural, communities must be within a county in which more than 25% of the county's residents reside in a rural area under standards established by the United States Department of Agriculture.

county in which more than 25 percent of the county's residents reside in a rural area under standards established by the United States Department of Agriculture.

Applicants are encouraged to apply with a diverse team of stakeholders that demonstrate geographic, demographic, public and private collaboration. Examples may include regional and city-county partnerships, businesses, nonprofits, technical colleges, stakeholder groups, community financial organizations and more.

The term "community" is loosely defined and partners may include counties, cities, towns, villages and regional development entities as well as a combination of these and others. It is the responsibility of the applicant to define the



A mix of housing strengthens rural communities.



New housing and rehabilitation efforts benefit Platteville businesses.

parameters and boundaries of the “community” per the unique experience with the workforce housing challenge.

The application will be published on WHEDA’s website and distributed per the outreach plan (Appendix A). WHEDA will host an information webinar to gather input and provide detailed information on the application process, background on the workforce housing issue and the intent of the pilot process.

A diverse selection committee of both internal and external stakeholders led by WHEDA will review the submitted applications and make final selections. Communities selected as finalists will be asked to participate in a virtual interview with representatives from the selection committee.

In addition to alignment with the scoring criteria (below), individual applications will also be evaluated and prioritized within the context of all applications submitted. WHEDA reserves the right to make final selections and develop a pilot community cohort that reflects the diversity of the workforce housing challenge across Wisconsin.

C. Criteria

A competitive scoring process will be used to select at least three pilot communities. Communities will be selected based on competitive criteria (See Appendix B for complete scoring criteria.) including:

- Demonstrated need for workforce housing and understanding of the local/regional “housing gap”;
- Existing momentum within the community related to the workforce housing issue;
- Commitment from local employers, local government entities, and others to ensure close collaboration throughout the pilot process and implementation;
- An assessment of need; and
- Presence of other community resources, land use



provisions, etc. that provide for leverage of invested or loaned funds by WHEDA or others.

D. Roles and responsibilities

While WHEDA will serve as the lead agent of the rural workforce housing initiative, partnership with local pilot communities is crucial to the success of the process. Accountabilities for the pilot communities will be outlined in the pilot application, reviewed during online meetings and outlined in documents submitted to applicants receiving pilot community designation.

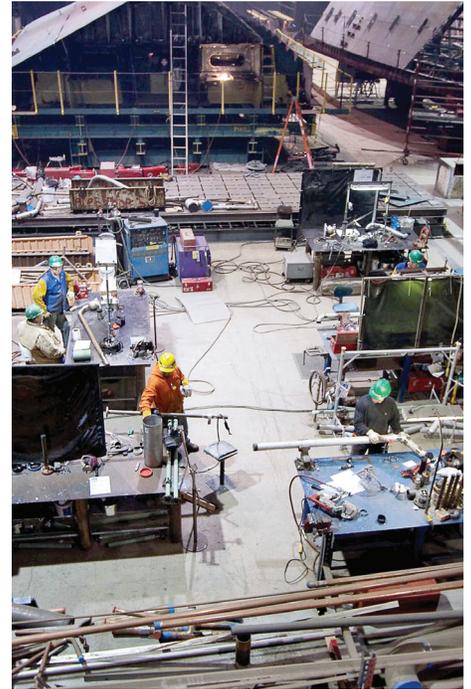
E. Pilot Process

The pilot design process will involve three phases: (1) exploring the dimensions of the local workforce challenge through research and community engagement; (2) applying what is learned to generate ideas and build working concepts with participants; and (3) selecting ideas that present the strongest business case and bringing them to implementation.

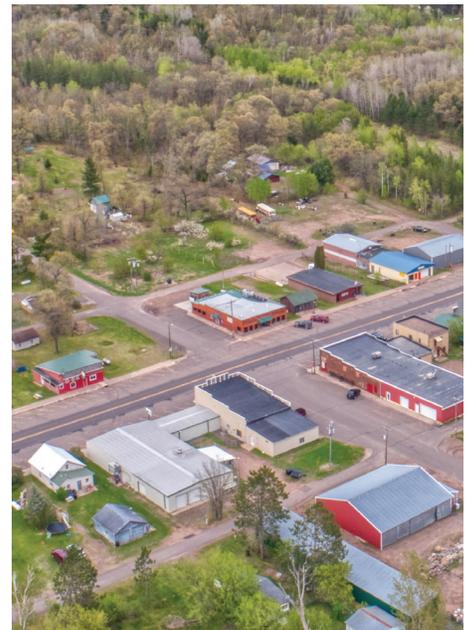
Each pilot phase is estimated to take roughly two months, depending on community timelines, priorities, resource availability and needs.

To make effective use of resources, WHEDA will stagger the start of the pilot process across all pilot communities.

The participatory process involves stakeholders in the research, design and implementation of solutions that address unique local needs and priorities. Further, by testing solutions at the local level with the involvement of community members, the process equips participants to share their knowledge with partners and peer organizations.



Manufacturers need a strong local workforce.



Challenges to rural housing include financing gaps.



SUPPLEMENTAL FINANCING TOOLS

While the rural affordable workforce housing pilot addresses housing challenges through adaptive processes, WHEDA intends to expand its efforts in supplemental financing tools for near-term results. Tools now under development include products and services that expand rural access to mortgage products, increase availability of single-family rehabilitation financing and improve the financial viability and competitiveness of rural multifamily projects.

Financing for these products is contained in WHEDA's amended 2019-20 Dividends for Wisconsin Plan. The Dividends for Wisconsin Plan is funded through WHEDA's operations and supports mission-based loans, grants and services.

Statewide supplemental financing tools supported by the Dividends for Wisconsin Plan and other reserves include:

1. Single family rehabilitation mortgage loan program expansion:
 - Through this initiative, WHEDA intends to expand and promote the single-family rehabilitation loan offered in rural areas through partnerships with local lending institutions. The product would be subject to WHEDA income and purchase price guidelines.
 - The home improvement loan program product would address single family home appraisal gaps in areas that would not otherwise support loan-to-value ratios traditionally required for existing rehabilitation loan products. WHEDA also intends to expand its reach and use in rural areas.

WHEDA financing tools support rural single family homeownership.



2. Rural multifamily program enhancements:

- Under this initiative, WHEDA's efforts to expand rural access to multifamily financing include establishment of a multifamily subordinated loan pool targeting 9% and 4% 2019 and 2020 housing tax credit projects in rural communities. This targeted loan pool will greatly enhance the financial viability of these projects under WHEDA's Qualified Allocation Plan.
- Other activities supported by the Dividends for Wisconsin Plan include single family closing cost assistance, increasing the number of affordable multifamily units statewide, supporting small businesses and funding the Foundation Grants program.



Scattered-site rental homes under construction on the Red Cliff Reservation were financed in part through WHEDA's housing tax credit program.

OUTREACH PLAN



Rehabilitation and preservation efforts add to a healthy housing mix.

Success of the rural affordable workforce housing pilot and supplemental financing tools depends on communicating the existence of these new opportunities and products. To accomplish this, WHEDA intends to implement an outreach and communications plan that is both comprehensive and flexible.

The plan identifies goals and objectives, target audiences, communication channels, key messages, tools, tactics and specific communication metrics to measure success. Consistent with the overall engagement strategy, the plan creates opportunities for partners to participate by sharing information through their own channels – affirming, echoing and elaborating on shared values regarding housing.

The plan calls for extensive engagement with local media outlets as well as use of social media, email, web, virtual engagement tools and printed collateral to enable success in the event of continued restrictions on large gatherings due to COVID-19.



Deby Dehn with WHEDA's Community Economic Development team speaks at a conference on workforce housing.

Initial communication efforts surrounding the approval of WHEDA's amended 2019-20 Dividends for Wisconsin Plan sparked significant engagement among WHEDA partners, customers and community members. Thus, the plan establishes channels to invite, manage and answer inquiries from all those with an interest in the pilot and supplemental financing tools. WHEDA intends to inform its partners and stakeholders of progress through regular updates. A full copy of the outreach and communications plan can be found in Appendix A.



MEASURABLE OUTCOMES AND DELIVERABLES

To support continuous improvement of products and services and inform future mission-driven strategies, WHEDA intends to develop metrics to evaluate the outcomes of the rural affordable workforce housing pilot and supplemental financing. These metrics will cover:

- Depth and breadth of engagement with partners;
- Extent of capacity building within the pilot communities;
- Reporting on applicability of solutions and development of a long-term WHEDA rural housing strategy informed by the pilot.
- Generation of housing units and dollars invested in each pilot community; and
- Generation of housing units and dollars invested in rural Wisconsin.



The shore of Lake Michigan has long attracted diverse manufacturing businesses; it also creates opportunities for housing redevelopment.

APPENDIX A

Strategic Communications and Outreach Plan: WHEDA’s Rural Affordable Workforce Housing Pilot and Supplemental Financing Tools

Purpose

The following strategic communications and outreach plan is intended to strengthen relationships, build trust and advance WHEDA’s ability to address Wisconsin’s shortage of rural affordable workforce housing.

Situation Summary

“Access to safe, affordable shelter is fundamental to the sustainability of our communities.”

The shortage of affordable workforce housing in rural Wisconsin poses far-reaching challenges. Access to safe, affordable shelter is fundamental to the sustainability of our communities because housing provides a foundation for public health, economic well-being and environmental stewardship. If Wisconsin is to thrive, rural communities require effective tools and support to develop affordable workforce housing.

The causes of the rural, affordable workforce housing shortage are many and vary by community, requiring both technical and adaptive solutions. While some problems can be solved through a combination of funding and technical program changes, addressing other challenges will necessitate adaptive changes in community priorities, policies and practices.

Participants at a series of statewide listening sessions organized by WHEDA have pointed to a number of factors contributing to the rural, affordable workforce housing shortage including rising construction costs; limited developer interest due to the smaller scale of rural projects; aging housing stock; few affordable rental options; zoning and infrastructure challenges; and limited



financing for new construction and renovation projects.

A rural affordable workforce housing initiative, funded through WHEDA's \$16.7 million 2019-20 Dividends for Wisconsin Plan and other funding sources, features a \$10 million pilot effort in at least three rural communities as well as supplemental financing tools to overcome gaps in existing programs. While the supplemental financing tools tackle technical gaps in existing programs, the rural, affordable workforce housing pilot establishes an adaptive framework to identify needs, evaluate choices and implement solutions.

To succeed, WHEDA's rural affordable workforce housing initiative requires the understanding, support and participation of many partners. The following strategic communications and outreach plan lays the foundation for the complex flows of information and messaging needed among multiple audiences to deliver results.

WHEDA's values statement identifies the open exchange of information as the foundation of its achievements and emphasizes the need for collaboration among partners. Consistent with these values, the communication plan seeks to foster engagement of WHEDA partners to leverage their ideas and communication capabilities for the benefit of all.

The following plan identifies goals and objectives; core messages; target audiences and preferred channels. It covers the deployment of communication tools and tactics with a rough timeline for the months ahead and metrics to document progress.

Goals and Objectives

The plan aims to achieve the following broad goals through the accompanying objectives.

“To succeed, WHEDA's affordable workforce housing initiative requires the understanding, support and participation of many partners.”

“The communications and outreach plan intends to strengthen relationships, build trust and activate WHEDA partners and stakeholders, improving the chances for success.”

- A. Increase understanding of and appreciation for WHEDA’s mission, vision, values and operations among key audiences;
 - 1. Through the messaging, tools, tactics and timeline outlined below, promote the rural affordable workforce housing initiative to achieve plan progress and to inform relevant audiences of WHEDA’s mission, vision, values and operations.

- B. Strengthen relationships, build trust and activate WHEDA partners and stakeholders, improving the chances for success as defined in the pilot;
 - 1. Through the messaging, tools, tactics and timeline outlined below, produce regular communications and engagement opportunities that provide transparency and create comfort with the pilot process.
 - 2. Through the messaging, tools, tactics and timeline outlined below, activate partners to implement solutions consistent with their own mission, vision and values that complement WHEDA’s work.
 - 3. Through the messaging, tools, tactics and timeline outlined below, provide opportunities for strategic partners to share and initiate communications in support of rural, affordable workforce housing solutions.
 - 4. Engage legislative stakeholders throughout the process to ensure the plan addresses key interests.
 - 5. Provide regular updates to WHEDA board members regarding progress on the affordable workforce housing pilot and supplemental financing tools.
 - 6. Provide regular updates to WHEDA staff regarding progress on the affordable workforce housing pilot and supplemental financing tools.



- C. Increase lender and consumer awareness of existing and new WHEDA products that serve rural communities
 - 1. Through the messaging, tools, tactics and timeline outlined below, build lender and consumer awareness of WHEDA products that serve rural communities.

- D. Develop and deliver metrics and reports that demonstrate successful engagement.
 - 1. Track communications and outreach efforts as well as the resulting performance through standard metrics including event attendance, social media engagement, news coverage and stakeholder participation for the duration of the rural affordable workforce housing pilot.

Target Audiences and Communication Channels

- A. Target audiences for the plan include:
 - Agricultural partners
 - Chambers of commerce
 - Community action program agencies
 - Community development authorities
 - Community development financial institutions
 - Commercial lenders
 - Developers (multifamily)
 - Developers (single family)
 - Economic development groups
 - Elected, cities
 - Elected, congressional
 - Elected, counties
 - Elected, legislature
 - Elected, towns
 - Elected, villages
 - Emerging business program updates
 - Federal Agency Partners (HUD; USDA; Commerce; FHA; Fannie Mae; Freddie Mac; FHFA)
 - Housing authorities and nonprofit housing groups

“The communications effort also will increase awareness of existing and new WHEDA products that serve rural communities.”

“The communications effort aims to connect with many potential partners and stakeholders.”

- Insurance organizations
- Lenders (multifamily)
- Lenders (single family)
- Multifamily development newsletter list
- Multifamily rent and income limits list
- Multifamily Section 8 hot topics list
- News media
- Property managers
- Public email list signups
- Real estate brokers (multifamily)
- Real estate agents (single family)
- Single family rates list
- Regional planning commissions (SEWRPC; Southwestern RPC; Bay Lake RPC; East Central RPC; North Central RPC; Northwest RPC; West Central RPC; Mississippi River RPC)
- Single family partners list
- State agency partners (DATCP; DNR; DOA; DOR; WEDC)
- Small business partners
- Tax credit compliance partners
- Trade association partners (Wisconsin Realtors Association; Wisconsin Counties Association; League of Wisconsin Municipalities; Wisconsin Towns Association; American Planning Association – Wisconsin Chapter; Wisconsin Bankers Association; Wisconsin Credit Union League; Wisconsin City/County Manager Association; Wisconsin Housing Alliance; Wisconsin Association of Housing Authorities; UW-System; UW-Madison; University of Wisconsin – Extension; 1000 Friends of Wisconsin; Wisconsin Manufacturers and Commerce; Great Lakes Inter-Tribal Council; Minority Chambers)
- Tribal contacts
- WHEDA staff members
- WHEDA board members
- WHEDA contractors and business partners
- WHEDA Foundation housing grant partners
- Workforce housing list (public)



B. Communication channels for the plan include:

1. Bulk email system

- a. A new bulk email system has been deployed to improve WHEDA's ability to reach target audiences with relevant information and track impact
- b. Email templates have been developed consistent with WHEDA's brand and focused content areas.

2. Website

- a. The website will feature a new home page slider.
- b. A new page on the workforce pilot will be deployed.
- c. A new Community and Economic Development page will be deployed.
- d. The website has been updated to feature signup options for the new bulk email system.
- e. SEO optimization efforts will include carefully chosen URLs and tags.
- f. Google analytics will be applied and measured throughout.

3. Community meetings and presentations

- a. The plan includes a webinar/online community meeting and public comment period prior to release of the application and scoring process.
- b. Additional meetings will occur as part of the pilot process.
- c. Affordable workforce housing messaging will be deployed at additional presentations by WHEDA staff members at groundbreaking events, grand opening ceremonies and appearances by WHEDA leadership.

4. News releases, interviews, newsletter articles and other long-form communication pieces

- a. News releases will be developed and deployed at strategic points to announce and track the pilot process as well as highlight the availability of

“A stronger online presence will support community engagement efforts.”

“The important role of the news media is considered in the plan, along with social media and potential advertising opportunities.”

- supplemental financing opportunities.
 - b. Designated WHEDA spokespeople will proactively seek media interviews and take advantage of tactical opportunities to share information with reporters, editors, photographers, graphic designers and bloggers.
 - c. Newsletter articles and blog posts will be created and distributed in coordination with partner organizations.
 - d. Op-eds will be created to highlight WHEDA’s thought leadership and proactive approach to rural affordable workforce housing issues.
5. Paid media opportunities
- a. WHEDA staff members will consider use of contract advertising opportunities to place ads highlighting the authority’s commitment to rural affordable workforce housing and specific product offerings.
 - b. WHEDA staff members will evaluate opportunities to contract with a media buyer to obtain paid placements highlighting supplemental financing opportunities and existing products that serve communities statewide.
6. Social media channels
- a. WHEDA staff members already have and will continue to post information regarding rural affordable workforce housing, the pilot and supplemental financing via Facebook, Twitter and LinkedIn.
 - b. WHEDA staff members are developing a dashboard using standard metrics to track progress in these channels.
7. Briefing materials
- a. Staff members have and will continue to develop briefing materials including talking points, testimony, media responses and one-pagers.



8. Partnership engagement efforts
 - a. To engage and activate partners, WHEDA staff members will send emails and conduct any necessary follow-up to secure partnership support in distributing rural affordable workforce housing information through partner channels.
 - b. To encourage shared solutions, WHEDA staff members will invite existing and non-traditional partners (such as health care systems, insurers and other employers) to attend meetings where rural affordable workforce housing issues will be discussed.

9. Invitation and event management channels
 - a. WHEDA staff members have integrated new invitation and event management capabilities made possible by a new content management system.

10. Video and photo opportunities
 - a. WHEDA staff members will consider contracting with a video production firm and photographers to document certain meetings and other aspects of the rural affordable workforce housing pilot process.

11. Publications
 - a. WHEDA staff members will produce brochures, one-pagers and other material ranging from pilot application forms to brochures on financing products.

12. Signage and displays
 - a. WHEDA staff members will produce signage and displays highlighting the commitment to rural affordable workforce housing for use at pilot community meetings, conferences and Business

“Briefing materials, potential events and marketing collateral will play a role in disseminating information.”

and Community Engagement events.

13. Personal contacts

- a. WHEDA staff members will continue to use personal channels to remain in touch with key stakeholders throughout the pilot process.

Key Messages

Following are key messages that will be deployed to target audiences through relevant channels, as identified above. Details regarding the deployment of these tools and tactics follow in section VI.

Key Message Matrix

Key Message 1: Wisconsin’s rural communities face unique challenges in addressing a shortage of affordable workforce housing.
Supporting Statement 1.1: Employers in rural Wisconsin continue to create jobs, yet in many cases these businesses face constraints in attracting workers. Employers and job seekers alike cite a lack of affordable workforce housing as a barrier to living and working in rural Wisconsin.
Supporting Statement 1.2: Participants at a series of statewide listening sessions organized by WHEDA have pointed to a variety of factors behind the shortage of affordable workforce housing. These include rising construction costs; limited developer interest due to the smaller scale of rural projects; aging housing stock; few affordable rental options; zoning and infrastructure challenges; and limited financing for new construction and renovation projects.

Supporting Statement 1.3: While some of these factors are new or have recently accelerated, others are longstanding and have contributed to an overall shortage of affordable workforce housing estimated by the Wisconsin Realtors Association to total some 20,000 units in the 20 largest counties from 2006 through 2017 alone.

Key Message 2: WHEDA is addressing the evolving challenges related to rural affordable workforce housing in powerful and innovative ways.

Supporting Statement 2.1: WHEDA collaborated with legislative leaders and partners to craft language creating the rural affordable workforce housing pilot and supplemental financing tools through the amended 2019-20 Dividends for Wisconsin Plan.

Supporting Statement 2.2: The proposal and a supporting document – the amended 2019-20 Dividends for Wisconsin Plan – introduce concepts that allow WHEDA to leverage its resources while encouraging potential partners to consider housing investments in rural communities.

Key Message 3: The pilot and supplemental financing tools provide flexible means to address the unique needs of Wisconsin’s rural communities.

Supporting Statement 3.1: The causes of the rural, affordable workforce housing shortage are many and vary by community, requiring a flexible, adaptive management approach as well as technical solutions.

Supporting Statement 3.2: The rural workforce housing pilot will select at least three communities for a participatory process with WHEDA and other partners to understand local needs, develop solutions and implement action by WHEDA and other stakeholders.

Supporting Statement 3.3: The supplemental financing tools to be introduced as part of the rural workforce housing initiative reverse or overcome scoring criteria that have traditionally placed rural projects at a competitive disadvantage.

Key Message 4: WHEDA’s 2019-20 Dividends for Wisconsin Plan represents a critical component of the rural, affordable workforce housing initiative.

Supporting Statement 4.1: The rural workforce housing pilot and supplemental financing are to be provided in part through an amended Dividends for Wisconsin Plan that also requires legislative action.

Supporting Statement 4.2: Funding for the Dividends for Wisconsin plan is generated from interest on WHEDA’s loans and investments; loan origination and servicing fees; tax credit allocation and monitoring fees; and housing management services. Established in 1972, WHEDA is a self-supporting public corporation that does not receive state tax dollars for its operations.

Key Message 5: Turning the tide on the rural affordable workforce housing issue requires many players.

Supporting Statement 5.1: During fiscal 2019, WHEDA provided \$217.4 million in financing to support construction of 2,003 affordable multifamily units and issued some \$30 million in tax credits to support construction of 3,829 multifamily units. While these numbers represent progress, demand continues to outstrip WHEDA’s financing capacity.

Supporting Statement 5.2: It will take the commitment of other public, private and nonprofit partners to turn the tide on affordable workforce housing issues in our rural communities.



Key Message 6: What is WHEDA?
Supporting Statement 6.1: WHEDA is an independent public corporation that works to expand affordable housing and economic opportunity.
Supporting Statement 6.2: WHEDA sells bonds and uses the proceeds to offer low-interest loans to qualified homebuyers and affordable housing developers. WHEDA also awards tax credits that close financial gaps for affordable housing developers.

Deploying Tools and Tactics

Activity	Purpose	Channel	Audiences	Execution/ Timing
1. Prior to action by Joint Committee on Finance				
1.1: Testimony and letters to legislative stakeholders	Enhance legislative awareness	Testimony, targeted emails	Legislature, partners	Public affairs/ Through June 16, 2020/Done
1.2: Bulk email deployment and list building	Establish comms infrastructure for broad engagement, measurement	Email	All	All teams/Before April 1/Done
1.3: Website content and page development		Web	All	Marcomm/
1.4: Establish public comment email	Establish comms infrastructure to encourage income inquiries	Outlook with Web link	All	Marcomm/ Before April 1/ Done
1.5: Social content	Build and educate audiences interested in the issue prior to bill signing	Facebook, Twitter, LinkedIn	All	Public Affairs/ Marcomm/ Prior to Joint Finance/Done
1.6: Legislative engagement	Share draft plans	Meetings	Key legislators	Plache, Public Affairs

1.7: Administration engagement	Share draft plans, discuss bill signing	Meetings	Administration contacts	Plache, Public Affairs
1.8: Board engagement	Provide updates	Emails, meetings	Board members	Team
1.9: Initial round of stakeholder engagement meeting locations and schedules set	Preparation for pilot announcement	Meetings	Internal	CED/Lab/Public Affairs
2. Joint Committee on Finance and WHEDA Board action on Dividends Plan				
2.1: Prepare and distribute news release on approval of amended Dividends for Wisconsin Plan and dedication of funds	Use broad distribution to inform and engage variety of audiences	News release	All	Public Affairs/Done
2.2: Prepare and post social content	Increase project profile, public appreciation for WHEDA's work	Facebook, Twitter, LinkedIn	All	Public Affairs/Marcomm/Done
2.3: Prepare and share partner newsletter content	Increase partner engagement and extend messaging reach	Partner media	Partner stakeholders	Public Affairs
2.4: Develop WHEDA financing brochure	Increase awareness of new and existing WHEDA tools	For distribution at meetings, web posting	All	Public Affairs/Marcomm
2.5: Discuss engaging with videographer	Establish plans to record meetings	For web posting	All	Public Affairs/Marcomm
2.7: Optional: Discuss engaging with media buyer	Develop paid media plans	Paid media channels	All	Public Affairs/Marcomm



3. Webinar to invite public feedback, kick off application process				
3.1: News release	Invitation for public feedback and initial explanation of pilot application process	Email	All	Public Affairs/ July 6
3.2: Develop PowerPoint presentation	Inform attendees about the application process, WHEDA's supplemental financing tools	Meetings	Meeting Attendees	Lab/CED/ Marcomm
3.3: Develop webinar	Host webinar to provide initial explanation and invite feedback on application process	Video, website, social channels	All	Marcomm/Lab/ CED/July 13
3.4: Legislative and board check-ins	Keep these primary stakeholders informed about progress	Meetings, emails, briefs	Key legislators, board members, senior staff	Plache/Public Affairs
3.5: Repeat 3.1-3.3	Second round of communications after application and scoring process open	Email, social	All	Marcomm/Lab/ CED/July 22 and later
3.6: Optional: Discuss hiring a photographer to obtain professional quality photos of at least one meeting	Provide images for current and future needs	All channels	All audiences	Public Affairs/ Marcomm
4. Pilot community selection/October				
4.1: Board and legislative notification	Informing primary stakeholders	Email, phone calls	Board members and key legislators	Plache/ Marcomm

4.2: Selection notification/turn down notification	Informing community stakeholders	Email	Email, formal letters?	Lab/Public Affairs/Marcomm
4.3: News release, social posts	Informing general public and building awareness of all WHEDA tools	News release, Facebook, Twitter, LinkedIn	General public	Public Affairs/Marcomm
4.4: Web page updates	Informing general public and building awareness of all WHEDA tools	Web	All	Public Affairs/Marcomm
5. Supplemental financing promotion/per availability				
5.1: Optional: Develop and deploy paid media creative	To reach a wider audience and build awareness of new and existing WHEDA products	Print, digital, radio	All	Public Affairs/Marcomm
5.2: News release and periodic social posts	To build awareness among media and general public about WHEDA financing tools	News release, Facebook, Twitter, LinkedIn	All	Public Affairs/Marcomm
5.3: Pitch story ideas to relevant media outlets	To increase coverage	Story pitch emails, phone follows	All	Public Affairs/Marcomm
5.4: Provide partner lenders with collateral (single family products)	Enhance use of WHEDA products throughout rural markets	Brochure and/or one-pagers	All	Marcomm/Public Affairs
5.5: Email to tax credit participants	Enhance understanding of new tax credit loan pool	Email	Developers	Marcomm/Public Affairs



6. Ongoing support for pilot activities/18 months				
6.1: News releases, media advisories, social posts	Provide continued visibility for effort and its outcomes	News releases, Facebook, Twitter, LinkedIn	All	Public Affairs/ Marcomm
6.2: Periodic updates to board	Update board on progress and outcomes	Board briefing, email	Board	Marcomm/ Public Affairs
6.3: Periodic updates to legislators	Update legislators on progress and outcomes	Briefings, emails	Legislators	Plache/Public Affairs
6.4: Create opportunities for stakeholders, participants to share their stories	Engage with stakeholders and participants for video shorts, interviews, quotes and opportunities to share their stories	Social and web channels	All	Public Affairs/ Marcomm
7. Pilot report and surrounding communications activities				

Delivering Performance Metrics

The following table provides an overview of the evaluation tools and timelines involved in developing performance metrics for communications and outreach surrounding the rural affordable workforce housing pilot and supplemental financing plan.

Outlet/ Message/ Tactic	Key Metric	Period	Notes
Bulk emails	Delivery, opens, click throughs	Per email	Will become part of dashboard
Website	Standard analytics	Per week with post highlights	Will become part of dashboard

News releases	Inquiries, pickups	Per email and distribution	
Media coverage	Review cost of Meltwater media monitoring package to gain ad value equivalency	Per story	
Invitations	Delivery, opens, click throughs and attendance		
Social channels	Standard analytics	Per week with post highlights	Will become part of dashboard
Paid media	Impressions, etc.		
Meetings	Event attendance	Per meeting	

Communications Workflow/Process

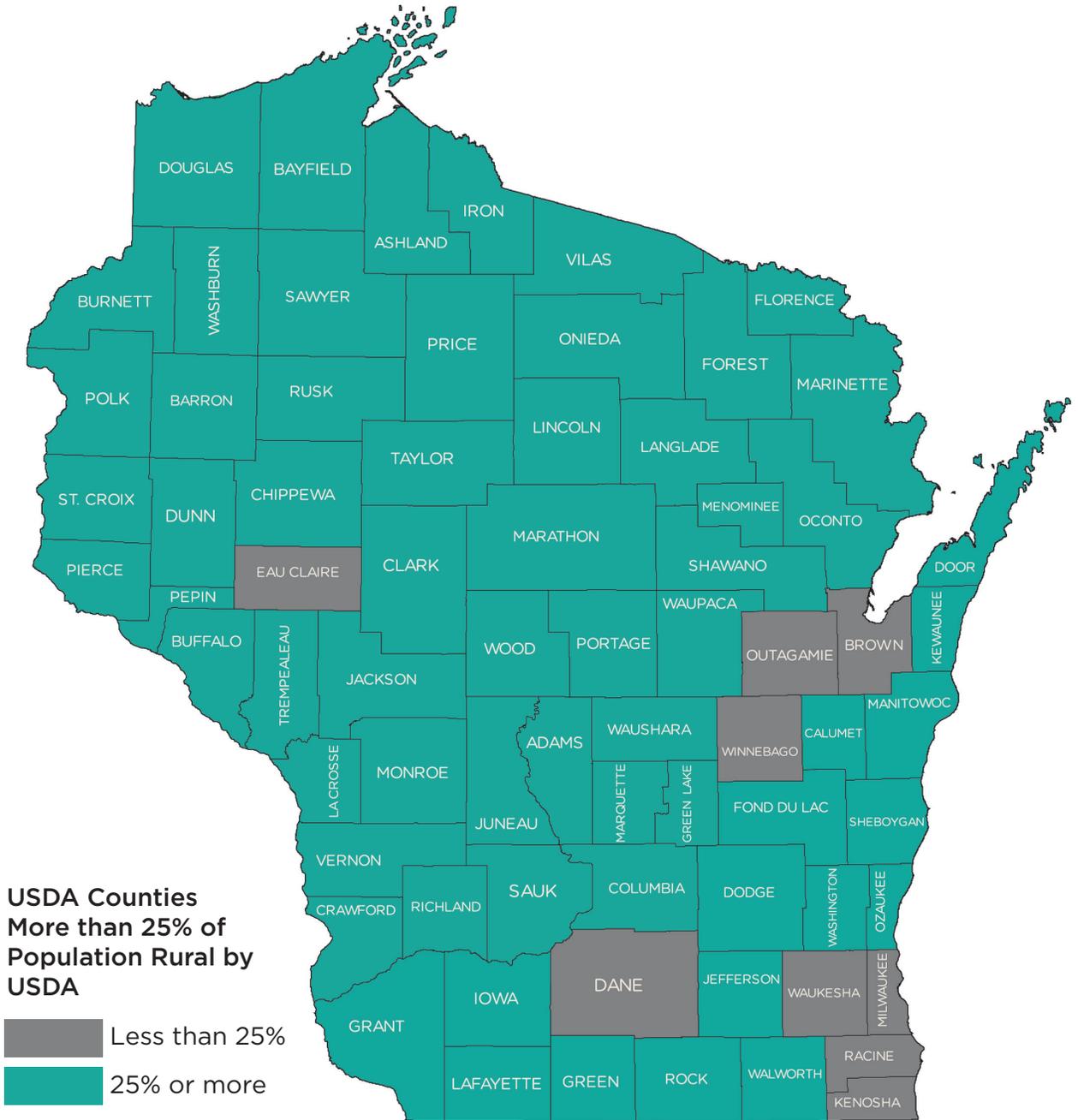
Communication type	Typical initiator/requestor	Approval and notification
Meeting support materials, meeting notices, etc.	Project team, CED, comms team, executive committee members	
Email newsletters, report outs, development of foundational literature, etc.	CEO, Project team, comms team, executive committee members	



Posting of established materials and messaging to Facebook, Twitter or other social media sites	Comms team	
News releases, media interviews, press conferences	CEO, comms team, executive committee members, partners	
Advertising and possible event sponsorship	CEO, comms team, executive committee	
Advocacy	CEO, executive committee, comms team	

APPENDIX B

Wisconsin Counties with at least 25% of Residents in USDA Rural Defined Census Tracts.





As seen in Chetek, Wisconsin's water resources are a draw for businesses and residents. Affordable housing helps maintain a strong local workforce.

APPENDIX C

Wisconsin Rural Workforce Housing Competitive Scoring Form.

GOALS	EXAMPLES	WEIGHT
Demonstrated need for workforce housing, and understanding of the local/regional “housing gap.”	A recently completed housing study demonstrating workforce housing needs.	40%
	Needs assessment.	
	Other recent planning initiatives, community engagement workshops, listening sessions, etc.	
Existing momentum within the community focusing around the workforce housing issue.	Regional affordable housing consortium, work group, committee, task force, etc.	15%
	Letters of Intent (LOI) from local, regional, and/or national developers.	
	Creating innovative approaches to build solutions around localized workforce housing challenges.	
Commitment from local employers, multiple scales of local government, and others to ensure close collaboration throughout the pilot process and implementation support.	Resolution supporting cross-county, -municipal, etc. partnership in the shared effort to produce workforce housing.	10%
	Letters of Intent (LOI) from local employers outlining level of support, in terms of financial resources or otherwise, to the pilot and long term solutions.	
Assessment of needs.	Preference to counties with at least 25% percentage of USDA rural census tracts.	15%
	Preference given to CDFI high housing needs census tracts.	
	HUD designated qualified census tracts.	
	Federal designations, i.e. New Markets Tax Credits, Opportunity Zones.	
<i>Continued next page.</i>		



GOALS	EXAMPLES	WEIGHT
Checklist of community resources and land use provisions which ensure adequate leverage of WHEDA dollars.	Tax Increment Financing (TIF)	20%
	Reduced cost public land	
	Patient capital loan funds	
	Credit enhancements and guarantees	
	Impact fee waivers	
	Access to Board of Commission of Public Lands capital	
	Planned application to other state or federal monies	
	City procurement	
	Updated zoning which allows for as of right residential land uses to produce workforce housing.	
Other resources		
	Total Score Possible:	100%



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