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Making a House a Home: A Community Plan for Regional Engagement on Housing

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MAKING A HOUSE A HOME:
A COMMUNITY PLAN FOR REGIONAL ENGAGEMENT ON HOUSING

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Prepared For
Virginia Organizing

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In loving memory of Liza Krizov, 16 July 1993 - 26 February 2019. Thank you for being my friend.

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Table of Contents

List of Tables

List of Figures

I. Introduction

Plan Purpose

Affordable housing is a growing issue in the Commonwealth of Virginia. These issues are relevant in areas with Virginia Organizing chapters and especially so in the Cities of Fredericksburg and Charlottesville. The Fredericksburg chapter is already organizing around affordable housing and the Charlottesville chapter is considering to do so as well. This past summer, the local paper in Fredericksburg reported on Virginia's mounting affordability crisis (Uphaus-Conner, 2018). In particular, reporters pointed to the *Out of Reach 2018* report that showed our state's residents continue to find themselves in unaffordable living situations (National Low Income Housing Coalition, 2018). Currently, Virginia is ranked twelfth in the nation by the National Low Income Housing Coalition in terms of highest two-bedroom housing wage. Smaller cities demand relatively high hourly wages to afford a two-bedroom apartment, as exemplified by both the Cities of Charlottesville and Fredericksburg, which require hourly wages of $22.67 and $34.48, respectively. These wages were publicized locally; for example, Fredericksburg's *The Free Lance-Star* reported the disparities between an affordable rent for a minimum wage worker and the wage required by the market in the City of Fredericksburg, as well as the region's counties (Uphaus-Conner, 2018). Similarly, Charlottesville's *The Daily Progress* reported in 2017 the area's high cost rents made it one of the most expensive in the state (McKenzie, 2017).

While previous community and tenant organizing efforts have attempted to address housing at the state and local level, little progress has been made in recent years. Progress is slow, largely due to the ever-increasing need for affordable housing, as noted in *Addressing the Impact of Housing for Virginia's Economy*; a need intensified by the highly anticipated workforce growth across the state over the next 10 years (Virginia Coalition of Housing and Economic Development Researchers, 2017). The report states the Commonwealth of Virginia has failed to "address affordable housing needs adequately (p. 3)." This failure has significantly affected key state policy priorities producing a gap in responsibility and action that organizers have attempted to fill. Virginia Organizing worked on affordable housing at the state level in the early 2000s and locally since, however, political changes nationally and statewide have made these campaigns difficult to pursue (Berta & Pohl, 2015, p. 109). Severely constrained federal

housing appropriations further push responsibility for affordable housing onto the state. Local organizing, particularly tenant organizing efforts, have dealt with changing local governments, decreased city budgets, and shifting funding priorities at all levels of government (McKay & Wavering Corcoran, 2018). One such affordable housing program affected by these issues, the City of Richmond's Neighborhoods in Bloom project, is now producing retrospective findings noting the importance of community buy-in and facilitation of these projects. As the need for affordable housing continues to increase, these findings should guide the future of organizing and policy in years to come.

Local planning departments often take into account housing affordability in their comprehensive planning efforts and products. Unfortunately, there has been little meaningful funding or policy focused on the issue. Both Fredericksburg and Charlottesville have housing chapters in their plans; however, neither is detailed despite both plans being under five years old. The *Fredericksburg Virginia Comprehensive Plan* recognizes the need for a housing plan and regional cooperation in its overarching themes (City of Fredericksburg, 2015). The comprehensive plan cites the *2015 Consolidated Plan for Community Development Programming*, which is essentially a housing plan (Community Planning and Building, 2015). The plan focuses on homeownership, housing the homeless, and home repairs. Charlottesville is currently updating their comprehensive plan, *Charlottesville, Virginia Comprehensive Plan 2013,* with a significant amount of focus placed on the housing chapter. The original document contains directives for regional approaches as well as "affordable housing for all population segments and income levels (City of Charlottesville, 2013, p. 44)." The comprehensive plans of these localities, the newspapers, and local organizers and chapters recognize the need for a regional approach to affordable housing. The issue is one without borders, a dispersal of people without recognition of jurisdiction. Regionalism, however, is especially difficult to achieve precisely due to differences in jurisdictions and borders for both planners and community organizers (Von Hoffman, 2009).

Recently, community organizers in both localities have jumpstarted housing campaigns. The need to move from "story sharing" to policy change and action is particularly important to achieve more than sympathy for one's neighbor, thus highlighting disconnect between continued rising unaffordability and the approved policy and strategy in these localities. While planners and community organizers alike recognize and attempt to tackle the affordability crisis, there is a

continued gap in policy-making and organizing. Although the link between policy-making and organizing is one of shared community and responsibility, planners and organizers have different stakeholder groups whose interests may not always align. Even the best planning efforts around housing are impacted by shifting politics, changing laws, and the missions of different community groups. This plan seeks to overcome this disconnect through both potential recommendation and bridge-building between planners and their communities. The plan will examine regional strategy and power relationships with a focus on moving from policy to action. Ultimately, the plan purpose is to create a replicable model for community organizers as they engage their chapters and local planning departments. The model identifies potential campaign goals that are able to be scaled-up to the region. The model is organized by capacity and goal difficulty, and informed by additional context found through chapter participation in the Cities of Charlottesville and Fredericksburg as well as the best practices research.

Client Description

Virginia Organizing is a non-partisan statewide grassroots organization dedicated to challenging injustice by empowering local communities to address issues that affect the quality of their lives (Virginia Organizing, n. d.). To complete this plan, I worked with Brian Johns, the Executive Director and Charlottesville chapter organizer, as well as Rabib Hasan, the Fredericksburg chapter organizer. The plan was primarily created for and will be implemented by Virginia Organizing to support their goal of "develop[ing] templates for local issue campaigns so that more of them can be replicated in other communities," as stated in the "Building Organizational Capacity" section of their *2018 Organizing Plan* (Virginia Organizing, 2018, p. 3).

Furthermore, Virginia Organizing holds itself to the belief that "every person in the Commonwealth is entitled to a living wage and benefit package that is sufficient to provide the basic necessities of life, including adequate housing […] (Virginia Organizing, n.d.)." Virginia Organizing is currently considering a housing campaign in Charlottesville and campaigns across the state, in addition to the one underway in Fredericksburg; the plan is therefore necessary at this time for guidance. Secondary organizations to share the plan with could include other groups working toward similar housing goals as well as the local planning departments and planning district commissions in the Charlottesville and Fredericksburg regions.

Both the Cities of Charlottesville and Fredericksburg are reviewing or preparing to begin reviewing their comprehensive plans and housing strategies, and should be interested in the desires of their community members as they write policy for the future. This plan complements the work being done by both Virginia Organizing and the planning departments, as it provides a missing link between planners and organizers. By examining the intersection of organizing and planning, the deliverable product specifically aids Virginia Organizing's chapters due to the replicable nature of the regional organizing model produced.

Outline of Plan

The creation of the replicable model was produced after completing research and constructing recommendations. This plan includes four main sections: Existing Knowledge, Case Studies and Best Practices Research, Recommendations and the Replicable Model, and Implementation. In this way, the plan moves from existing knowledge to research in order to produce recommendations and implementation suggestions.

| Existing Knowledge | Case Studies and Best Practices Resesarch | Recommendations and Replicable Model | Implementation |
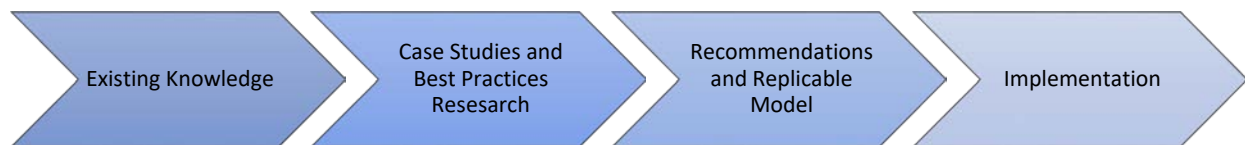
Figure 1. Plan Process

II. Background

Plan Context

This plan relies on existing conditions knowledge of Virginia Organizing's structure as well as the two case study regions of Charlottesville and Fredericksburg, which include their surrounding counties. Currently, there are 12 chapters across the state staffed with an organizer and two self-sustaining chapters, which are the Martinsville/Henry County chapter and the Danville chapter. The chapters vary widely in their characteristics, as Virginia Organizing operates without focus on density or population totals. Rather, the organization locates based on community interest and one-on-one discussions between organizers and community members. Due to this, there are communities big and small, dense and sprawling, and rural and urban.

A matrix of existing community conditions and differences is examined in *Table 1* with a pilot typology shown; the typology is based on occupied housing units. While the final replicable model is based off capacity and goal difficulty, the purpose of this pilot typology is to recognize differences in current Virginia Organizing chapters by their location characteristics. In this case, by number of occupied housing units from the 2010 Census (U.S. Census Bureau, 2010). The purpose of utilizing occupied housing units is twofold – to show variation across chapters in potential tax base and capacity. For this initial typology, delineation by the number of occupied housing units largely matches with total population. However, the former was chosen to control for children and ship-boarded military members in total population data. Both of these populations are not particularly ripe for inclusion due to the sway on data. Children below high-school age are not usually chapter members and ship-boarded military members do not necessarily live within the locality they are counted in. Number of occupied housing units, however, controls for this and accounts for potential tax base from property tax as well as a one-on-one organizing approach via interviews and door knocking.

Chapter	Population in 2010	Population change 2000-2010	Population per square mile in 2010	Occupied housing units in 2010	Housing units per square mile in 2010	Percent renter occupied units in 2010	Percent owner occupied units in 2010
Lee County	25,587.0	1,782.0	58.8	10,159.0	27.0	27.2%	72.8%
Harrisonburg City	48,914.0	6,025.0	2,807.9	15,988.0	1,001.4	63.4%	36.6%
Danville City	43,055.0	-3,662.0	1,002.9	18,831.0	522.7	46.5%	53.5%
Eastern Shore	45,553.0	1,136.0	68.9	19,121.0	42.8	29.3%	70.7%
Washington County	54,876.0	3,654.0	97.8	22,843.0	45.6	25.4%	74.6%
Martinsville and Henry County	67,972.0	-3,795.0	172.8	29,235.0	85.1	29.6%	70.4%
Suffolk City	84,585.0	21,547.0	211.4	30,868.0	82.6	27.2%	72.8%
New River Valley	94,392.0	8,151.0	243.9	35,767.0	99.7	46.7%	53.3%
Portsmouth City	95,535.0	-567.0	2,839.1	37,324.0	1,212.7	41.2%	58.8%
Staunton, Augusta, and Waynesboro Region (SAW)	118,502.0	8,435.0	118.3	47,899.0	52.5	27.8%	72.2%
Charlottesville Region	142,445.0	14,129.0	194.9	55,935.0	83.9	42.1%	57.9%
Norfolk City	242,803.0	2,544.0	4,486.4	86,485.0	1,755.7	54.6%	45.4%
Fredericksburg Region	275,644.0	72,450.0	404.8	93,216.0	146.3	25.7%	74.3%
Hampton and Newport News	318,155.0	1,789.0	2,648.6	125,695.0	1,130.2	45.9%	54.1%

Table 1. Virginia Organizing Current Chapter Locations Characteristics, 2000 - 2010. Adapted from U.S. Census Bureau, 2010, "Population, Housing Units, Area, and Density: 2010 – State – County/ County Equivalent"

When examining the case study regions, the comprehensive plans of these cities and surrounding counties yields additional context. The case study regions add context beyond general chapter research to include a more in-depth dive on regional relationships and power. Virginia Organizing's chapters as well as the case study regions are shown in *Figure 2*.
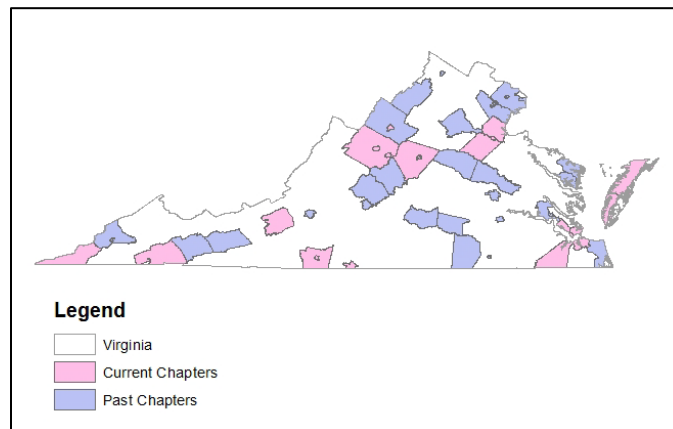

Figure 2. Current and Past Virginia Organizing Chapter Locations. Adapted from U.S. Census Bureau, 2010, "Population, Housing Units, Area, and Density: 2010 – State – County/ County Equivalent"
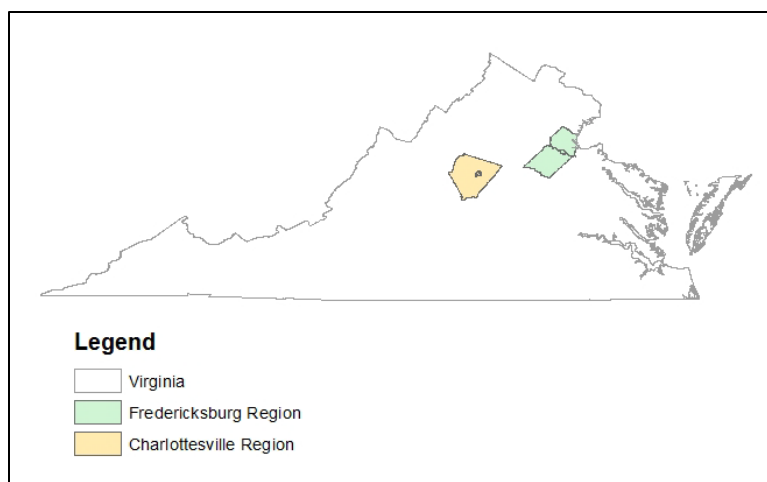
Figure 3. Location of Fredericksburg and Charlottesville Case Study Regions. Adapted from U.S. Census Bureau, 2010, "Population, Housing Units, Area, and Density: 2010 – State – County/ County Equivalent"

These case studies represent two of the pilot typologies above – areas with mid-range and larger numbers of occupied housing units. Both the Charlottesville and Fredericksburg chapters were ripe for further study due to their regional nature. Therefore, the case study regions are defined as follows: City of Charlottesville and Albemarle County, and City of Fredericksburg and the Counties of Stafford and Spotsylvania. For this study, two Virginia Organizing chapter cities and their surrounding counties with over 100,000 residents have been selected due to their size, typological difference, and current campaigns. The purpose of selecting these counties with higher populations is to increase the likelihood of building regional engagement and capacity. This issue, in some ways, is already recognized and addressed by both chapters due to the organizing underway in the counties around each city chapter. This plan will build on and utilize this local context and blossoming regionalism.

Case study context includes the United Way's ALICE (Asset Limited, Income Constrained, Employed) Report, which identifies the Charlottesville and Fredericksburg regions as areas home to a high portion of ALICE households (United Way, 2017). The City of Charlottesville alone is home to nearly 19,000 households, of which nearly 8,500 are ALICE or in poverty (p. 184). Albemarle County, which is within the Charlottesville region case study, is home to over 14,000 households that are ALICE or in poverty (p. 162). In the Fredericksburg region, the ALICE report identifies ALICE or in poverty households to total 5,500 in Fredericksburg, 20,000 in Spotsylvania County, and over 15,000 in Stafford (p. 207, 277, & 278). In each county, the most expensive basic necessity listed is usually the cost of housing for

a single adult. Additionally, housing is often only slightly less expensive than childcare for households with two adults, one infant, and one preschooler. Additional research shows that in the Fredericksburg region the portion of cost-burdened households spending more than 30 percent of their income on housing is higher for renters than homeowners. Stafford County has the highest number of cost burdened renters and homeowners at 55 and 22 percent, respectively (Lisa Sturtevant & Associates LLC, 2017, p. 18). The City of Fredericksburg and Spotsylvania County, however, have similar levels of cost burdened renters.

In part, these levels of cost burdened households combined with the high cost of housing in the Charlottesville and Fredericksburg regions have paved the way for Virginia Organizing's interest in housing. While this interest was rekindled, it is not new. In 2001, Virginia Organizing launched their first statewide campaign, which was on affordable housing (Berta & Pohl, 2015, p. 47). They made significant strides at the time by campaigning for Virginia Housing Development Authority reforms such as increased public presence at meetings and expansion of loan programs (p. 51). The Fredericksburg chapter has been campaigning for a housing trust since late 2017. The Charlottesville chapter is also interested in beginning a housing campaign in respect to the already existing ecosystem of groups in the region. The Charlottesville chapter's potential campaign is especially opportune as there is a comprehensive plan update underway in the city, thus offering the chance for significant payoff on Virginia Organizing action. However, ensuring complementary action is vital to supporting the work already underway externally to the chapter. Further existing conditions are found in the comprehensive plans for these areas, which cite the need for affordable housing.

Existing Knowledge

This plan is meant for organizers, whose work Virginia Organizing describes as facilitating "real people raising their voices and taking action to create real change in their communities (Berta & Pohl, 2015, p. 17)." Across the literature, organizing is a strategy used in the empowerment of communities through direct-action; although this may take many avenues, the goal is the same – for people to confront issues in their communities (Brooks, 2005). Bockmeyer contends that organizing is often a response to some type of community disinvestment, meaning organizing is a response to a perceived problem (2003). Critiques of American-style community organizing argue the piecemeal nature sometimes opens

neighborhoods and communities to continued and heightened administering by government (Stoecker & Vakil, 2000). Despite this, the American organizing ecosystem has a strong history and network. Authors generally paint organizing as localized, even asserting that "community organizing begins as work in local settings to empower […] to build […] and to create action for social change (p. 441)." This basis of organizing, and the specific model of Virginia Organizing, offers a lens to view further literature through. Literature on organizing focuses on three major themes: strategic planning for capacity building, grassroots approaches, and the need for regional cooperation.

Capacity Building

Across the literature, capacity building, or the ability of an organization to complete its goals, is tackled in different ways. Brooks (2005), for instance, points to capacity building as the role of strategic planning. He argues for an organizing model that is clear, written, and codified for staff to understand and implement – advice imperative to the creation of this plan. Complementing the critique of community organizations to develop clear models, Howell and Brown Wilson (2018) argue for radical collaboration to build a horizontal structure, one that places government as a partner rather than leader. Partnership, a method of capacity building, would benefit from the restructuring of this traditional power relationship. Meaningful engagement as a product of this shift would also empower community organizers and their members; empowerment is therefore key to capacity building.

Grassroots Approaches

Grassroots approaches, as the second theme, were identified in the literature as necessary for good, actionable organizing to take place. Modern organizing is mainly framed as a response to government inaction and funding pitfalls, which catalyzed citizens to begin organizing in the latter half of the 20th century (Bockmeyer, 2003). While reactionary, and arguably working as some arm of the government in the form of community development corporations (CDCs), Bockmeyer reminds future plans to consider the political nature of the localities being worked in and the impact on organizing. Political power, however, is not the only power at play in community organizing. Christens et al argue the psychological empowerment of citizenries is imperative for "effective […] mobilizing for greater citizen control over systems, environments,

resources, and rights (Christens, Tran Inzeo, & Faust, 2014, p. 419)." For grassroots organizing to achieve a true bottom-up approach, the empowerment of local chapters is of the utmost importance. Without the "listening" by organizers in one-on-one settings and the propelling of members interests, empowerment and therefore successful organizing, will not take place.

Regionalism

The last major theme present in the literature is the need for regionalism. Young et al argue increasing the size of community-based organizations does not diminish democracy or the community voice (Young, Neumann, & Nyden, 2018). Growing an organization to tackle regional issues is not a death knell to internal democracy, but rather a means for amplifying power and voice that was already present. Young et al (2018) also point to state-community organization relationships, like those described by Howell and Brown Wilson (2018), as a means for stronger collaboration. However, the authors also cite these relationships as a means of commanding greater attention from "new and old political players," a move undoubtedly important when scaling up to the regional level (p. 70). Historically, too, regionalism has played a role in housing. Regionalism, as a concept in real estate development, is particularly linked to the creation of suburbs. An element of the existing literature that is especially important when creating this plan, as regionalism is nothing new to planners or community members in Virginia and the study regions (Von Hoffman, 2009).

Despite the agreement of scholars on the necessity of regionalism in planning, this paramount principle is often unmet in practice. "Responsible regionalism" is one of six planning principles the American Planning Association (APA) uses to score comprehensive plans, yet localities often fail in this area (2017). The problematic nature of regional planning is evident in Virginia where localities voluntarily join planning district commissions (PDCs). In the mid-1990s the PDCs were found to have "become increasingly 'locally-oriented,'" undermining regionalism – the mission of the PDCs (Virginia Association of Planning District Commissions, n.d., p. 10). This is largely due to the voluntary nature of cooperation in the state and concrete jurisdictional boundaries that separate stakeholders and tax dollars. The result is a weak regional focus with few incentives to adopt comprehensive policy in the face of intra-regional competition. While regionalism is touted by APA and Virginia's PDCs, it is an overlooked and undermined principle, despite being a concept with a strong history nationally, statewide, and in

the case study regions. Both the George Washington Regional Commission, serving the Fredericksburg region, and the Thomas Jefferson Planning District Commission, serving the Charlottesville region, produce regional planning documents. Despite this, housing has remained a local issue.

Local Context

Additional points on these topics includes the ecology of community empowerment, which focuses on the effect of incivilities to mobilize populations to organize (Perkins, Brown, & Taylor, 1996). This mobilization is applicable to Charlottesville where community members began organizing in the wake of the Unite the Right rally and subsequent protests on August 12, 2017 (Hays, 2018). While this protest ignited the community to request housing bonds and a hold on the comprehensive plan update, the most significant result was the refocusing of the community's priorities. Charlottesville residents demanded, and have achieved, the requirement of a housing plan with greater engagement to be included in the comprehensive plan update, a powerful example of the potential in Charlottesville (Charlottesville Low-Income Housing Coalition, 2018). This plan addresses issues of organizing in the community with a focus on effectively organizing around housing.

Current best practices in affordable housing policy include the maintenance of housing trust funds, like the Virginia Housing Trust Fund, which is administered through the Virginia Department of Housing and Community Development and the Virginia Housing Development Authority (Virginia Department of Housing and Community, 2018). This fund, and others like it, especially benefit from dedicated funding. While the Virginia Housing Trust Fund has certain allocated funds, local money should be dedicated as well. Further best practices include the use of Low Income Housing Tax Credits (LIHTC), which preserve and improve affordable housing; since 2003, Virginia has allocated 4% and 9% tax credits for preservation (National Housing Trust, 2015). At the regional level, empowering the planning district commissions to produce reports with teeth in the form of dedicated funding is a superior effort, one recognized by the PDCs and the local plans in Charlottesville and Fredericksburg, both strategic and comprehensive. Currently, the City of Fredericksburg operates a housing voucher program, as does the City of Charlottesville. However, the waiting list is closed across Virginia (Virginia Housing Development Authority, 2010). Arguably, one of the best practices this plan should

consider is inclusionary zoning, which would require the creation of low-income housing in conjunction with the creation of market rate housing (U.S. Department of Housing and Urban Development, n.d.). Rabib Hasan, the Virginia Organizing organizer in Fredericksburg, is currently campaigning for this practice; a best practice clearly identified by those working in the study area regions.

The advancement of affordable housing in in the Fredericksburg region, however, does not appear to be handled by any organization other than Virginia Organizing. While there are several references to the Thurman Brisben Center and other shelters in community plans, there is no mention of major players in the affordable housing area, only in the housing of homeless and at-risk populations (Community Planning and Building, 2015). The City of Fredericksburg has policy that supports affordable housing, but it mainly centers on rehabilitation programs and aid for homeowners. Focus on affordable housing as a community issue is mainly due to the mismatch of incomes and location in the Fredericksburg region – Washington, DC incomes in central Virginia. This plan will address a community strategy for organizers in the region while also working to translate community desires into policy and action. Although Virginia Organizing has a model that has been successful for 20 years, there is room for growth in an area as complicated as affordable housing. The closure of the organization's first campaign on affordable housing and subsequent acceptance of political shifts are aspects of this organization's history and context that this plan will seek to rectify. Increased interest in housing both politically and organizationally shows the need to produce this plan immediately to address continuing issues across the Commonwealth and in Virginia Organizing chapter communities.

III. Methodology

Theoretical Framework

To create the plan, several theoretical perspectives were utilized. The recommendations section is grounded in the framework of the *Just City* while the Replicable Model utilized radical planning theory. The theory of the *Just City* is used to achieve equitable and just outcomes based in the democratic process while radical planning theory aims to transform power relationships and claim power from the bottom-up. The *Just City* is a critique of communicative planning in that Fainstein recognizes it "fails to take into account the reality of structural inequality and hierarchies of power (p. 259)." The three key tenants of the *Just City* are democracy, diversity, and equity, which were all considered in this plan's recommendations. Fainstein points out that diversity and deliberation are in tension, a point that is especially relevant to the research questions and methodology. There are many different populations within both the Charlottesville and Fredericksburg regions that may or may not be represented in the chapter meetings. To work around this issue of groups in tension, mapping was completed with geographic indicators in mind, such as mapping chapter member's perceptions of housing in their community while also marking the location of their home. In this way, individual voice is given necessary space while also recognizing that individuals do not necessarily represent the whole community. In speaking with Rabib Hasan on issues within the Fredericksburg chapter, he spoke to the failure of "sharing your story," as he recognized that this process often helped humanize the housing narrative, but failed to move citizens and board members to action. Incorporating these understandings into the planning process aids in achieving just outcomes.

Further use of the *Just City* centers around the role of planners in this project. The *Just City* reasons that planners do not abandon the community in the planning process, but rather often work with them albeit in a context where power is often in favor of the planning department rather than citizens. Knowing this, the methods of this plan were designed to include engagement with local planning staff to better understand their role in creating and supporting regional cooperation around housing. Engagement with staff, though, did not eclipse engagement with chapter members and organizers. The *Just City* asks planners to approach their own careers with this theory in mind, namely, to use planning tools to end discrimination and block inequitable planning from continuing. The goal of this plan is to produce a product for

community organizers rather than planners; however, as a planner, I followed the list of criteria for the *Just City*. I, myself, am not exempt. When approaching the plan, the first item on Fainstein's list of requirements stands out. The requirement decrees that housing should provide a "suitable living environment for everyone (p. 268)." This idea inspired the plan concept, as it is also a goal of Virginia Organizing. Recognizing this, the plan's research questions and methods were developed with the end goal of "for everyone" in mind. Similarly, the framework of the *Just City* supports the recommendations of the plan by providing a foundation of justice and equity

The *Just City* further supports a shared power structure between planners and community members. Fainstein recognizes the need for political power to carry out the *Just City*. When considering the recommendations of this plan, the need to organize recommendations around potential policy speaks to the power of local governments to enact and community members to suggest. Fainstein advises, "without a mobilized constituency and supportive officials, no prescription for justice will be implemented (p. 269)." Without engaged citizens, there are no supportive officials. This aspect of the *Just City* greatly influenced the plan concept in that the original intent was to address Virginia Organizing's issues surrounding housing engagement. The issue is not only with local governments, but also internal to the chapters themselves. To address the concerns of the Fredericksburg organizer, Hasan, the replicable model includes implementation steps for organizers and their chapter members. This requirement forces the model to wholly encompass the chapters by addressing the true source of power and action – the members – while remaining realistic. This necessity is further supported by the work of Mitchell who argues that to expand the right to the city we must be mindful of "utopic possibilities, and the dangers;" which is ultimately what the model tries to parse from the recommendations (2003, p. 236).

An additional theory utilized to frame this plan is radical planning. As a way to transfer power, Friedmann explains the theory as "practice […] dedicated to changing existing relations of power, whether exercised by the state or global corporations (2011, p. 61.)." Friedmann's theory largely pulls from Arnstein's "A Ladder of Citizen Participation," in that he recommends pursuing the upper rungs of the ladder where citizen power has been achieved (1969). This framework influenced the structure of the plan by forcing me to consider my role in the planning process further, as one potentially of hindrance. The role of planners in this plan's methodology

is to be informed by the community and to recognize the power imbalances at play in the case study communities. Radical planning is transformative in that it focuses on "overcoming the resistance of established powers in the realization of desired outcomes," a process that is community driven with the goal of claiming power and voice (Friedmann, 2011, p. 63). Overcoming established powers to complete this reclamation speaks to the eighth rung of Arnstein's ladder – citizen control (1969). The model produced, however, pulls from the sixth and seventh rungs as well – partnership and delegated power. The methodology used to answer the research questions therefore focuses on community voice and perspective rather than asking planners for their visions and ideas. Research involving local planners does not include a visioning process, as that is solely the realm of the community in this plan.

While Friedmann recognizes the necessity of the state's involvement in planning, he makes clear the role of government is to create the conditions for self-development and empowerment (2011). He points to the politics of empowerment, redistribution, and place as areas where organized pubic action and social learning must take place in order to restructure the state. While this plan does not aim to restructure the state, it does take into account these politics. When designing methods, for instance, the politics of empowerment and place were considered. Chapter members are particularly connected to place, as they are a member of their chapter based on the location of their community. The politics of place are relevant to this plan due to the housing component and regional perspective.

In framing the plan using radical planning theory and the *Just City*, the importance and value of the community in determining its own future was recognized. Every question asked or method utilized in this plan supports the empowerment of the community as well as the equitable goals of the *Just City*. Utilizing these frameworks in both process and outcome is of the utmost importance due to the necessity of proper process begetting proper outcome (Christensen, 2015). The importance of power being shared, outcomes being equitable, and the promotion of community-based voice and direction are required for this plan's success.

Initial Best Practices

In addition to the theoretical framework utilized in this plan, there are several guiding templates for the recommendations and replicable model of this plan. The International Association for Public Participation (IAP2) has produced a series of guidelines for practitioners

of public participation (International Association for Public Participation, 2018). These materials serve as a model of engagement in addition to the Community Tool Box produced by the University of Kansas (2018). The tool box serves to help organizers troubleshoot organizing issues whether external or internal. The tool box is a guide for the recommendation portion of the plan whereas the IAP2 guidelines will serve implementation portion. Study of *Community Organizing in Rural Environments: A Guidebook for Community Health Initiatives* has been reviewed to lay the groundwork for the replicable model portion of this project, as the model put forth is utilized by communities similar to the study regions in this plan (University of Iowa Prevention Research Center for Rural Health, 2008). Similarly, the *SmartCode* produced by Minnesota GreenStep Cities is scalable and meant to be utilized in the formation of the replicable model piece as well. This style of scalable code is widely accepted in the planning community, and when combined with other more organizing focused models, is an appropriate approach to the design of this plan's replicable model. This plan lays out how Virginia Organizing can begin building capacity around the housing issue with respect to models and guidelines known and accepted in both the planning and organizing communities. By utilizing both planning and organizing, this plan provides nuanced understanding of the planning process as well as proper recommendations and implementation strategy.

Research Questions

The theoretical framework utilized in this plan has informed the research questions and methodology as well as the recommendations and replicable model. Ultimately, the research questions explore how Virginia Organizing chapters can build power around housing campaigns. Research for this plan includes studying existing plans, plans in progress, and the communities in question. Sources of information to utilize include chapter and organizer input, Virginia Organizing's model, and Virginia Organizing's past campaigns. The bulk of the research conducted focused on chapter members, organizers, local and regional planners, non-profit representatives, and best practices. Chapter member research included surveying, focus groups, observation, and qualitative mapping. Interviews with Virginia Organizing staff on campaigns and the strategy shift in 2014 were conducted via phone and in-person, and were structured as a conversation. Planning research was largely completed through interviews with planning staff in the cities and regional bodies serving the two case study areas. Best practices interviews were

conducted via phone and in-person with organizers who have successfully built these campaigns, individuals who have been members themselves, and with individuals employed in the intersection of planning and organizing. The goal of this process was to produce a replicable model that organizers can utilize in their respective chapters on a regional scale. Achieving this, however, required research to focus on producing a plan that builds power.

This plan addresses the following three questions:

1. What is the status of regional engagement on housing in these communities?
    a. A statewide understanding of regional engagement was garnered from interviews with Virginia Organizing organizers. Additionally, a look into the comprehensive plans and any other related plans, complete or not, in the cities and counties comprising my case study region shed light on the status of regional engagement. Research into each chapter's evaluation of the ecosystem of groups working on housing issues was also completed – this involved surveying chapter members, qualitative mapping, and interviewing organizers. Further research on this ecosystem was completed with respect to the local conditions in each case study region.

2. What examples exist nationally for engagement on housing?
    a. National examples researched include the Housing For All Campaign in Washington, DC (Coalition for Nonprofit Housing and Economic Development, 2018) and the housing work completed by Richmonders Involved to Strengthen our Communities in Richmond, Virginia (RISC Richmond, 2018). To understand these cases of successful housing campaigns, they were researched as best practices due to their success.

3. What policy recommendations are appropriate for Virginia Organizing to pursue?
    a. This required interviews with organizers on the political nature of their region as well as research into policy recommendations made in similar areas. Survey answers from chapter members also shed light on the comfort level of the chapter with pursuing housing as a campaign and different potential policy recommendations. Additionally, conversations with planners in the case study regions were necessary to learn the scope of the local planning department's interest in change. However,

discretion and vision was utilized in answering this question in way to reasonably push the envelope.

Detailed Outline of Plan

In order to appropriately explore and answer the research questions, this plan worked through a four-step process. The process was to first gather existing knowledge, complete case studies and best practices research, then recommend policy and create the replicable model, and lastly to discuss implementation for regional engagement around housing.

1. **Existing Knowledge:** Researched best practices, potential policy courses, and academic literature. Further analysis of guiding documents like *Community Organizing in Rural Environments: A Guidebook for Community Health Initiatives*, the IAP2 guidelines, *SmartCode*, and University of Kansas' Community Tool Box was completed.

2. **Case Studies and Best Practices Research:** Beginning chapter research included evidence pulled from, and on, existing Virginia Organizing chapters with the goal of organizing into a preliminary typology to help case selection. Further research included interviews with organizers and demographic analysis to develop a model that addresses differences in chapter resources, population size, and density. The two regional case studies are (i) City of Charlottesville and Albemarle County and (ii) City of Fredericksburg and Stafford and Spotsylvania Counties. Additional research on these regions included the areas' organizing with a focus on housing, regional actors and perceptions in play, status of regional cooperation by locality and by regional planning commission (George Washington Regional Commission and Thomas Jefferson Planning District Commission), and any other useful background knowledge. Additionally, methods yielded information on organizing and individual perceptions of chapter members. Similar research on best practices provided context for the basis of regional organizing.

3. **Recommendations and Replicable Model:** Recommendations include (i) building capacity to sustain a long-term campaign, (ii) taking a regional approach to housing, (iii) creating community buy-in, capacity, and leadership, and (iv) implementing techniques to scale-up. The replicable model was designed to consider the recommendations and incorporate them with level of capacity to suggest goals. The model provides goals to

organizers that ultimately build capacity and infrastructure that allows a chapter to take on harder challenges.

4. **Implementation:** The schedule of implementation lays out the timeline organizers should take to best complete the recommendations. Implementation supports the replicable model and scalability, which will guide organizers as they engage their communities to address housing concerns. This portion of the plan preserves the voice and power of community members by including these aspects throughout the implementation schedule.

Sources of Information

To answer the research questions, this plan utilized many sources of information. The sources of information available, and already utilized, are both public and private. The academic literature on existing conditions and theory is generally in the public sphere; however, accessing it is largely private yet possible due to Virginia Commonwealth University's journal subscriptions. Best practices on the subject are also publicly and privately available with model information public through the University of Iowa's online *Community Organizing in Rural Environments: A Guidebook for Community Health Initiatives*, University of Kansas' virtual portal for The Community Tool Box, and the publicly accessible *SmartCode* through Minnesota GreenStep Cities.

Privately, though, the International Association for Public Participation guidelines was accessed and the confidential *2018 Virginia Organizing Plan* and *2019 Virginia Organizing Plan* utilized. Virginia Organizing's book *Building Power, Changing Lives: The Story of Virginia Organizing* as well as their online materials have been utilized throughout this plan, all of which are in the public domain. Census data, which will guide the research process, is a public source available through the U.S. Census Bureau that has been utilized in *Table 1*. This information was also used to create Figures 2 and 3. Additional publicly available data sources include comprehensive plans, strategic plans, and zoning ordinances from the counties, cities, and regional planning commissions for the Charlottesville and Fredericksburg case study regions. Stakeholder outreach provided the engagement piece of this plan and was gathered through confidential means from chapter members. Each planner and best practices individual

interviewed was given the option of anonymity to yield as honest of results as possible; the majority chose anonymity.

Stakeholder Outreach Methods

Outreach for this plan included in-person and phone interviews of Virginia Organizing organizers, planners, and non-profit representatives in the case study regions. I also surveyed chapter members in the Charlottesville and Fredericksburg regions and met with small focus groups for a qualitative mapping exercise followed by short discussion. Further outreach included observation of three chapter meetings and one rally. I also spoke with organizers who have successfully organized around housing to gauge what went well in their campaigns; these individuals included the Housing For All Campaign and RISC. Additional interview research included best practices gathered from individuals working in the intersection of planning and organizing. These methods best answer my research questions while also giving the necessary space and time to participants, especially chapter members.

Analytical Methods

Analytical methods for this plan focus on answering the research questions through both qualitative and quantitative means. Initially, census data on the 14 Virginia Organizing chapters was collected to create the pilot typologies that guided case study selection. Further analysis of the case study regions led to the creation of the replicable model based on best practices interviews, which yielded detail about capacity as the major typological difference between localities. Analysis of the information collected from comprehensive plans further supports the recommendations. The goal is to identify good policy, potential policy gaps, and areas for recommendation. Information collected from interviews and surveying worked in conjunction with other methods including mapping and interviewing. The qualitative mapping exercise is especially important, as it provided a visual aid resulting from the opinions of chapter members. Linking these responses with geographies defined by chapter members was interesting and yielded results that speak to internal perception and biases of chapters, as well as regional dispersion. Additionally, analysis of the surveys provided quantitative data to understand perceived gaps in affordable housing on behalf of chapter members. These methods evolved

with the project, particularly interview questions. *Table 2* exemplifies the methods used for analyzing the information sources and research questions.

	Academic research/ Best practices	Census data/ Data analysis	Interview: in-person and phone	Survey/ Focus group/ Observation	Mapping
1. What is the status of regional engagement on housing in these communities?	Analyze comprehensive plans in case study regions	Compile and analyze demographic data on the case study regions with an emphasis on housing, income, and density; analyze survey responses	Interview Virginia Organizing organizers, planners at the PDCs, nonprofits, and city planners in the case study regions	Surveying, holding focus groups, and observing in case study chapters shed light on the perspective of chapter members on housing	Qualitative mapping connects survey responses to geography
2. What examples exist nationally for engagement on housing?	Study academic articles and best practices from the (i) DC Housing For All Campaign, (ii) Richmonders Involved to Strengthen our Communities, and (iii) individuals working in the planning/ organizing intersection		Interview stakeholders/ organizers at the two national case study nonprofits; interview individuals in intersection of planning/ organizing	n/a	n/a
3. What policy recommendations are appropriate for Virginia Organizing to pursue?	Research best practices in the two national case study areas, the individuals, and the two case study regions; academic research on potential policy solutions	n/a	Analyze interviews to reveal framework for potential policy and atmosphere surrounding policy	Chapter member surveys and focus group reveal possible policy paths to consider	Qualitative mapping reveals areas for policy

Table 2. Analytical Methods and Data Sources Matrix

Methodology Summary

This professional plan considers the policy and actions Virginia Organizing can take when building power around a housing campaign. The purpose of the plan is to provide Virginia Organizing with a replicable model for regional engagement on housing issues, with the express purpose of implementing the plan. Virginia Organizing's *2018 Organizing Plan* requires this plan to "move people to action," which is why the implementation section will tackle

transforming policy into action. To achieve this, the replicable model will be organized by capacity ability to ensure scalability. Ensuring scalability is a key requirement for new campaigns in the *2019 Organizing Plan*, as Virginia Organizing aims to "develop templates for local issue campaigns so that more of them can be replicated in other communities (Virginia Organizing, 2019)." Therefore, the replicable model is designed to meet this standard. The model, from a planning perspective, is similar to state enabling model statutes, an established and respected practice. However, the *Just City* and radical planning theory frameworks are utilized to ensure that justice is achieved and power remain with Virginia Organizing rather than with planners.

Existing knowledge references the need for capacity building, grassroots approaches, and regionalism in recommendations. Throughout the process, I have considered the implications of planning in organizing, as well as the framework for a regional approach. Accordingly, research for this plan is multifaceted and includes interviewing best practices individuals, organizers, non-profit representatives, and planners in addition to surveying, completing a qualitative mapping exercise, and conducting a focus group with chapter members in Virginia Organizing's Charlottesville and Fredericksburg chapters. At the heart of this project is a focus on community power as a means to organize, but also as the passion for this work. The goal is to provide the best possible recommendations and implementation strategies for Virginia Organizing and, by extension, residents of the Commonwealth.

IV. Research Findings

Findings in this plan are the result of observation, interviews, focus groups, and surveying. In total, (i) four observation periods, (ii) 24 surveys, (iii) two focus and qualitative mapping exercises with 11 people, and (iv) 17 interviews with 21 people were conducted. The four observation periods included observation at one rally and three chapter meetings. The surveys in Fredericksburg were distributed at two consecutive chapter meetings on 24 January and 19 February 2019. The Charlottesville research was conducted slightly different to suit the needs of the chapter. These changes included an online and in-person survey; the online survey was distributed on 28 March and the in-person responses collected on 2 April 2019. The Fredericksburg chapter focus group and qualitative mapping exercise was held on 19 February 2019; the focus group and exercise were conducted immediately following the completion of the chapter meeting and surveys. The Charlottesville chapter focus group with qualitative mapping exercise was held on 2 April 2019 following completion of the chapter meeting and additional in-person surveys. Both qualitative mapping exercises were conducted in the same way. Chapter members were asked to designate (i) where they believe affordable housing is currently located in pink, (ii) where they believe affordable housing is lacking in orange, (iii) where affordable housing should go in light green, and (iv) where they live in dark green. The interviews were held over a number of weeks both in person and over the phone. Interviews were conducted with regional planners, local planners, non-profit representatives, organizers, Virginia Organizing staff, and individuals working in the intersection of planning and organizing. The length of interviews averaged just over an hour with the longest lasting over two hours and the shortest lasting 40 minutes. Of these interviews, seven were conducted with people who contributed to the best practices research. These methods were focused on the case study regions of the Cities of Charlottesville and Fredericksburg, Virginia, as well as selected best practices in Richmond, Virginia and Washington, D.C. The research has yielded a number of major themes, including regionalism, internal and external capacity, time and expectations, and power and roles.

City of Fredericksburg

Findings in the Fredericksburg case study region were discovered through extensive interviews, including two separate hour-long interviews with the region's organizer, Rabib Hasan. Further interviews were conducted with regional planners at the George Washington Regional Commission and local planners at the City of Fredericksburg. Chapter members were observed on three occasions, completed surveys, and participated in a focus group and qualitative mapping exercise. The Fredericksburg chapter has over 250 active members who are currently campaigning for a housing trust fund. The region does not have additional non-profits active in the housing conversation, as stated by Hasan (personal communication, 15 February 2019). There are two groups, the League of Women Voters of the Fredericksburg Area and the National Association for the Advancement of Colored People (NAACP), that are active in Fredericksburg and the surrounding counties but have not undertaken housing initiatives. When asked about on-the-ground organizing, Hasan pointed to the national leadership structure of both organizations as rigid and therefore unable to respond as quickly as Virginia Organizing (personal communication, 15 February 2019). Both groups are interested in housing affordability issues with the former recently completing and publishing a study titled *Affordable Housing for Low-Income Seniors in the Fredericksburg Area* (2019). The recommendations of the report support the work of the Fredericksburg chapter (League of Women Voters, 2019, p. 24-30). The report specifically recommends to "create a local Housing Trust Fund, composed of one or more government jurisdictions." This report not only supports the work of Virginia Organizing, but also places the onus on regional cooperation rather than an individual locality. Additionally, the statewide NAACP has historically supported increased focus on Stafford County, which also benefits the region (Byers, 2008). While there are a few non-profits and organizing groups interested in housing, Virginia Organizing is the only group in the Fredericksburg region actively organizing around affordable housing goals.

Regionalism

Throughout the research, regionalism emerged as an expectation and goal. There was significant focus on the need for regional housing in conversations between chapter members in observed chapter meetings. The surveys, as shown in *Figure 4*, yielded a number of results for the Fredericksburg chapter including the identification of surrounding counties as imperative to

completing housing work. These counties ranged from larger immediate neighbors such as Spotsylvania and Stafford Counties, to all counties in Planning District 16. This regional view is further supported by the number of chapter members living outside the City of Fredericksburg, as observed in a chapter meeting as well as the mapping exercise responses from the focus group (personal communication and mapping exercise, 19 February 2019). Only four members at the chapter meeting reported living inside the City of Fredericksburg, and only two of the focus group participants. The individuals who reported living outside the city all lived in Stafford County with the majority living in the southern portion of the county (mapping exercise, 19 February 2019). Regionalism also appeared in the majority of responses to survey questions 6 and 7 with members stating opinions such as "[the planning department] should know they need to work across county lines" and "South Stafford has space – put housing there (Fredericksburg chapter member survey, 24 January & 19 February 2019)."

Figure 4. Virginia Organizing Fredericksburg Chapter Member Survey, distributed 24 January and 19 February 2019

Hasan, the Fredericksburg organizer, spoke to this regional perspective as well. He mentioned the regional approach his chapter initially took, which required speaking with county supervisors in Spotsylvania and Stafford Counties. While he acknowledged that a "regional approach should exist" he concluded that "it's not gonna work … regionalism is kind of a black hole in the conversation" because the lack of accountability when working in a regional capacity on the part of government officials both locally and regionally (personal communication, 15 February 2019). Further discussion revealed the limited participation and inclusion on part of Stafford County. However, Hasan concluded, "if we finish this campaign early, I really want to attack Stafford." From Hasan's perspective, pursuing housing goals outside of Fredericksburg is still desirable, but only possible after an initial "win." By having one housing goal completed, scaling up to the region is more possible.

Local planners in the City of Fredericksburg reported difficulty working regionally largely due to jurisdictional realities. While regionalism has been difficult, they "would work with GWRC (personal communication, 15 February 2019)." This is not hypothetical, as they are the entity who has requested the George Washington Regional Commission investigate housing in response to City Council's increased interest. However, they recognize that despite the need for regional consultation and planning, it is unlikely this will proceed currently (personal communication, 15 February 2019). Local politics further hinders local planners taking a regional view, as they "can only propose."

The George Washington Regional Commission is the regional planning body in the Fredericksburg area. While there are several planning efforts regionally, housing is not currently one of them. Regionally, there is cooperation around the Continuum of Care (personal communication, 3 April 2019). However, this cooperation has not yet extended to housing solutions. There is discussion to start a regional housing study with Virginia Housing Development Authority funding up to $100,000 depending on the number of participating localities. However, a decision by the GWRC members had not yet been made by the date of this interview. This was partly due to concerns "about creating an authority" as well as perceptions of affordable housing held by elected officials and community members. This issue further impacts regionalism by creating "talk, but an unclear political will," which GWRC relies upon for the implementation of its work. Unfortunately, regionalism around housing has not been a priority since 2008 for GWRC, which was when the Affordable Housing Task Force

produced their single report before disbanding. This has further stunted the regional conversation. Despite this, local planners support regionalism, as they share information between jurisdictions, which, as stated by one GWRC interviewee, "is highly unusual." Therefore, there is a fledgling informal regional network already utilized.

Planners and community members desire a regional approach in the Fredericksburg area, showing support for regionalism in housing. All parties reported the need for regional governance on the issue, particularly in planning. Housing does not end at the city or county line, but instead affects every individual on a personal level. However, resistance to regional studies reportedly comes from elected officials and planners in the region who do not wish to "do yet another study, another plan that sits on the shelf (personal communication, 3 April 2019)." Similarly, chapter members voiced their resistance in a chapter meeting, claiming the potential study was "just another distraction, another way for the City to get out of doing anything (personal communication, 24 January 2019)." Yet, GWRC staff reported positively that the New River Valley area is completing a housing study, suggesting hope for the Fredericksburg area to do the same. The chapter, too, still holds hope for regionalism, as it was a key part of their rally. The keynote speaker, Felicia Charles, is an outreach pastor in Stafford County. She spoke to the need for people and communities to come together to effect change (personal communication, 12 January 2019).

Internal Capacity

Virginia Organizing's Fredericksburg Chapter faces internal capacity issues, as observed and discussed by both members and the organizer. While there is an active membership of 250 people, the two meetings observed had between 10 to 20 members and the rally about 50 participants. Observed capacity issues include the homogenous chapter meeting attendees as well as the inconsistency of attendance, as seen on the consecutive 24 January 2019 and 19 February 2019 meetings. The majority of attendees on both occasions were retired white individuals whose attendance often shifted between meetings. The chapter member surveys revealed a strong desire to partner with other organizations with 5 of 15 surveys reporting this (Fredericksburg chapter member survey, 24 January & 19 February 2019). Another internal capacity issue found in the surveys was the need to remain focused in meetings and in actions, which was reported by 6 of 15 individuals. While these capacity issues were made clear by

chapter members, the response of one member, "My first time!," shows that although partnering and consistent focus may be lacking, expanding membership is not (Fredericksburg Chapter Survey, 24 January & 19 February 2019).

When discussing capacity with Hasan, he admitted his main capacity issue is retaining directly affected individuals. He specifically spoke to the issue of losing his directly affected persons over the course of a campaign due to the stresses of their lives taking priority over the lifecycle of a campaign (personal communication, 19 February 2019). A follow-up interview dug into these capacity issues, which he clarified as "always a concern (personal communication, 1 April 2019)." He noted these concerns are particularly pressing when asking directly affected individuals to take on leadership roles, as their resistance affects internal equity. Engaging directly affected individuals is an organizing priority, but there is a mismatch as overcoming the challenges of day-to-day life is the directly affected individual's top priority.

Other internal capacity issues include the issue of initially "biting off more than they could chew" when the chapter considered "tackl[ing] five counties." Hasan made clear that organizing is not a scripted endeavor, but rather includes changes in direction and goals in response to on-the-ground realities. The changes and time required, however, can lead to directly affected people leaving a campaign, as exemplified by his one directly affected individual leaving the housing campaign due to personal difficulties and lack of campaign successes over time (personal communication, 19 February 2019). This individual's personal difficulties further reflect the class issue present in the Fredericksburg chapter – one where the majority of the chapter is more affluent than the directly affected people. This is made clearer by the distribution of dots in the chapter member mapping exercise, as shown *Figure 5*. The light green, orange, and pink dots are often far away from the dark green dot, which is where the individual lives, suggesting nimbyism in the chapter or that chapter members live where it is most affordable for them. Internally, this constitutes a chapter issue in that individuals are either nimbies themselves, or cannot afford to live where the chapter is pushing for change. Hasan reflected that ideally "the chapter would recognize that allies can do the boring work while directly affected people are the face," a distribution meant to partially atone for the class issues present (personal communication, 1 April 2019).
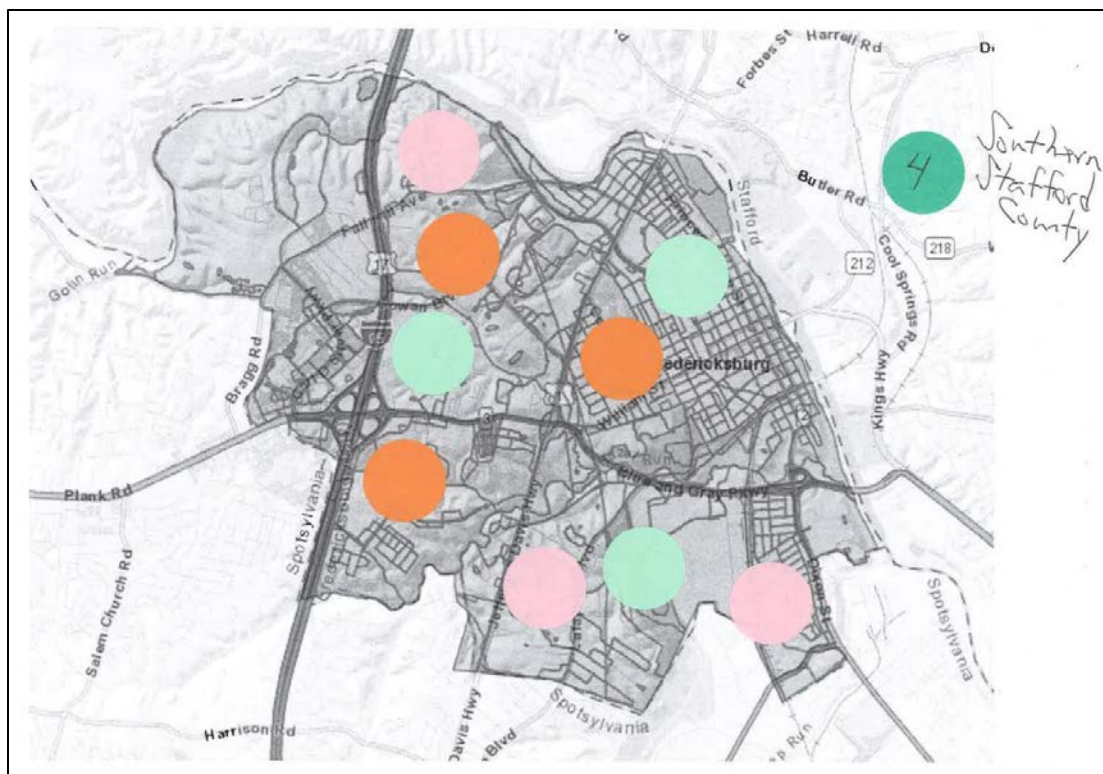
Figure 5. Virginia Organizing Fredericksburg Chapter Mapping Exercise, completed 19 February 2019

External Capacity

External capacity challenges gravitated toward the lack of planners working on housing and the small ecosystem of affordable housing non-profits in the region. Neither the City of Fredericksburg nor GWRC have planners on staff who solely work on housing, rather the responsibilities are delegated as they arise. The planner working the most on housing issues described their position as "keeping the machine running (personal communication, 15 February 2019)." While not innately negative for housing work, it shows there is not an individual in the planning department who is focused on housing. Without this housing role, housing concerns are fielded by several individuals, which often leaves community members exasperated. This was particularly apparent in chapter comments that "planners are not advocates" and they "rarely help us and instead are more like bureaucratic walls (personal communication, 19 February 2019)." In the absence of a specific "point person," chapter members often felt as though their concerns are passed from person to person.

The small ecosystem of affordable housing non-profits and interest groups was made particularly apparent in conversations concerning succession planning with Hasan. Hasan spoke

to role of partners in the January rally as one of turnout and support, but not partnership (personal communication, 15 February 2019). While he, and his chapter, value their support, partnership or coalition building is not possible at this time. The chapter surveys unanimously agreed that partnership is desired, which the focus group also touched on in detail. Members reported their concern they "are the only group doing this work" and "anyone else is not ready to enter the fray (personal communication, 19 February 2019)." Hasan further explained this point by pointing to the issue of nationally led non-profits as "being slow to act due to the leadership chain" whereas Virginia Organizing chapters are meant to focus on local issue campaigns and can therefore react faster at the local level (personal communication, 15 February 2019).

When considering capacity both internal and external, the research shows a clear need for strength of both. Without an individual whose position is to work on housing either at the local or regional level, community members feel their concerns are falling to the wayside. So, too, planners themselves feel stressed as they still have to "answer to their bosses" and respect that "there are many organizations with many missions," showing inability to achieve minute housing detail in the face of more generalist planning work (personal communication, 15 February 2019). The external capacity of the housing ecosystem is crucial to formulating organizing practices and plans in a chapter. Hasan highlighted this in his search for a non-profit to "take on the housing trust" once it is won; no small feat, considering he reported only one suitable non-profit in the region (personal communication, 1 April 2019). The challenge of scaling up when faced with the after question – "after the win, what happens?" – has also become more of an issue. Succession planning for future campaigns focuses on "recognizing capacity where it exists;" for example, in Stafford County where he sees energy building. Internally, the chapter has to be able to meet this need. Hasan pointed to Stafford County because a number of their members live there, which offers an existing organizing foothold.

Time and Expectations

Research in the Fredericksburg area revealed varying expectations and associated timeframes. As cited by the organizer, the "campaign has been going a year and a half… quite a while to ask directly affected individuals to engage (personal communication, 15 February 2019)." While a timeframe was unspecified for campaign completion, the goal discussed by both the organizer and chapter members was the end of this summer, preferably by the end of

July 2019. However, the focus group revealed that chapter members believe "planning moves at a slower pace than what we need (personal communication, 19 February 2019)." The expectation of community members and the organizer is a housing trust fund with the goal of $1 million dedicated by the City of Fredericksburg. The expectations of planners, though, are drastically different. The local city planners described their job as doing "the full mist while non-profits are the drops (personal communication, 15 February 2019)." They elaborated they believe zoning tools, rather than funding, is what will aid affordable housing efforts more over time as "$1 million is only 10 units." When asked about timeframes, planners recognized the length of the bureaucratic process as "sometimes [taking] 400 years to set up a committee…we are spending public dollars." Similarly, regional planners echoed the need for a regional study in order to convince the region, and its individual jurisdictions, to act (personal communication, 3 April 2019). Despite taking years, the regional planners expect a study to help push decision makers toward exploring affordable housing solutions.

Power and Roles

Further complicating expectations for all parties, is the power and roles at play. Inconsistent understanding and even blatant misunderstanding of power dynamics and roles is common. Misunderstanding the role and power of planners on part of chapter members, for example, is shown in the organizer's idea that "organizers are not advocates (personal communication, 15 February 2019)." This sentiment disagrees with the belief on part of the local planning staff that they are advocates and try to incorporate Arnstein's ladder into their work (personal communication, 15 February 2019). There is an opinion on the part of Hasan and the chapter members that GWRC is without power, as it "does not have accountability," and is therefore not worth the effort to fully engage with (personal communication, 15 February 2019). Despite this, the regional planners believe their role is as a convener and professional resource, which does offer them some power (personal communication, 3 April 2019). The regional planners further pointed to the Affordable Housing Task Force housed by GWRC until 2008, which had some regional accountability and power.

Paradoxically, the power of planners stems from the power of the communities they represent, as having an organizing group "back you up" to city council or board of supervisors is vital for planning work to happen and for the implementation of plans (personal communication,

15 February 2019). Planners agreed on the power of the public, particularly in public meetings.

However, all parties agreed on the overarching power of elected officials, as they essentially

oversee the workings of the regional commission and local planners. While chapter members, as

elected officials' constituents, are able to question them in a way staff is not, there is still the

ability to ignore their concerns, as stated by chapter members (19 February 2019). The difficulty

of navigating the power and roles of elected officials in the planning and organizing processes is

due to the fluidity of their positions, which they hold for short periods. This political fluidity

also impacts the perceptions planners and organizing groups hold of each other. Furthermore,

the power both groups hold is largely reliant on the political atmosphere of a locality or region.

Chapter members encapsulate this in their focus group discussion that "planners are only as

powerful as the electeds let them be (personal communication, 19 February 2019)." Hasan

analyzes this power dynamic in his belief that planners "can help us develop policy," but "take

orders from the council (personal communication, 1 April 2019)." He further explains that

organizing often "comes with the tone of screaming and shouting and doesn't want to direct that

at staff," a reality made difficult when city staff are also part of city government.

Conclusions

Housing work in the Fredericksburg case study region is thriving in a low capacity

ecosystem. The Virginia Organizing chapter located there has made headway despite its status

as the only group actively working on the ground toward an affordable housing goal. There is

support, however, from other non-profits for this work. While there is a desire from chapter

members, planners, and the organizer for regionalism, it is also recognized as a hindrance at this

time. The goal, though, as explained by the organizer and chapter members, is to scale-up the

"wins" in the City of Fredericksburg to the region. There are issues of understanding roles in the

region, particularly around the power of local and regional planners. Additionally, there are

varying expectations as to how long these housing goals should take to be achieved, and even

differences in process expectations.

City of Charlottesville

Findings in the Charlottesville case study region were discovered through extensive

interviews, including interviews with Brian Johns, the Executive Director and Charlottesville

organizer for Virginia Organizing, and Joe Szakos, the founding Executive Director and Charlottesville organizer. As suggested by Johns, additional interviews were conducted with non-profits in the region such as Greater Charlottesville Habitat for Humanity on 2 April 2019 and Piedmont Housing Alliance on 5 April 2019. The Charlottesville chapter is not currently working on a housing campaign, but is considering their role in the housing conversation taking place in Charlottesville. Johns relayed the questions being asked by chapter members – "what's the power that each group brings?," what do we add right now?," and "what should that be (personal communication, 19 March 2019)?" Because of this, Johns suggested interviews with Habitat for Humanity and PHA to better understand the non-profit ecosystem around housing in Charlottesville. The Charlottesville ecosystem has several non-profits actively engaged around housing as well as significant interest in regional planning efforts. Interviews with local planning staff and regional staff at the Thomas Jefferson Planning District Commission were also conducted. Similar to the Fredericksburg case study region, chapter members in Charlottesville were observed at a chapter meeting, took surveys, attended a focus group, and completed a qualitative mapping exercise.

Regionalism

Virginia Organizing Charlottesville chapter members and organizers identified regionalism as vital to the success of housing strategies. The goal of regionalism was pointed to in the chapter surveys, shown in *Figure 6*. Chapter members responded in two-thirds of the surveys that they wanted affordable housing in Albemarle County and in "[counties] in the Region 10 Planning District (Charlottesville chapter member survey, 28 March & 2 April 2019)." Further responses to questions 7 and 8 revealed additional support for affordable housing in the Charlottesville regions' rural areas with one chapter member responding they see "rural working class [individuals] …. often living in very crude, unfit, unhealthy, unsafe situations." The regional nature of housing needs in Charlottesville were identified in rural areas as well as downtown. One survey response mentioned the need for housing "downtown and in adjacent areas" while another even noted "you can't make 60k and have a family and be able to live close." Johns, who stated the Charlottesville region needs "a regional plan that actually puts the onus on the individual jurisdictions" further supported these responses highlighting housing needs across the region (personal communication, 19 March 2019). Joe Szakos, the former

Charlottesville organizer, also emphasized the issue of regional accountability in his point that "there is no one pulling these jurisdictions together into a regional body pushing for regional [solutions] (personal communication, 2 April 2019)." While chapter members and organizers recognize the need for regionalism when working on housing, they also recognize that regionalism often lacks accountability.

Making a House a Home: A Community Plan for Regional Engagement on Housing
Virginia Commonwealth University
Dept. of Urban and Regional Studies & Planning

Virginia Organizing Charlottesville Chapter Member Survey

1. In your opinion, what is the most important aspect of community organizing?

2. Do you believe is important to work with the surrounding counties on housing issues?
   (Circle one, please)
   YES   NO
        a. If so, what counties?

3. Do you believe partnership with other organizations is an asset when working on housing issues?
   (Circle one, please)
   YES   NO

4. Is partnership with local government an asset when working on housing issues?
   (Circle one, please)
   YES   NO

5. How would you want affordable housing implemented in the Charlottesville region (i.e. housing trust, inclusive zoning, public housing)?

6. What do you think the planning department should know or look into about housing?

7. Charlottesville is growing, what area(s) should this growth be directed to?

8. Are there specific areas you believe especially need affordable housing? Why?

9. What is one area the chapter could improve on internally (i.e. adding members, meeting more, partnering)?

Please stay after for the focus group and mapping activity! It should be quick. THANK YOU!

Figure 6. Virginia Organizing Charlottesville Chapter Member Survey, distributed 28 March and 2 April 2019

The non-profit community and planners also point to these issues in their discussions of regionalism in housing. When asked, one non-profit representative reported they "heard city councilmembers say 'there isn't enough land'… I don't know how to create that, but the city can't do it alone (personal communication, 2 April 2019)." The representative recognizes that the city cannot tackle affordability alone, but instead must incorporate the surrounding communities. Regional planning staff recognizes the regional need as well, and has held a

housing summit in late April 2019. They believed it was "a chance to get everyone in a space (personal communication, 2 April 2019)." While the regional planners saw potential, they also knew they could "get the horse to water, but […] can't make them drink." Here, regional planners in Charlottesville further echo issues of accountability. Despite this, another non-profit representative made that point that the "TJPDC is trying to educate the less enlightened counties" with events such as the housing summit (personal communication, 5 April 2019). Regional issues are difficult to overcome, as that same non-profit representative later mentioned, "some of the counties don't even think they have a problem." In the face of this pushback from counties in the Charlottesville region, a local planner in the City of Charlottesville readily agreed there was a regional need particularly after August 12, 2017, the Unite the Right rally. They went on to explain that "lots of people agree that affordable housing is important but can't point to where it should go (personal communication, 2 April 2019)." The inability to point to a specific place highlights the regional need even more, as it is a problem that cannot be connected to a specific location. In an effort to do this, though, chapter members showed their own desire for regionalism in affordable housing. As shown in *Figure 7,* the chapter mapping exercise, members showed a tendency to disperse affordable housing regionally. Like in the Fredericksburg exercise, the location of the dark green dots were often far away from the other dots showing where affordable housing is located, lacking, and should be built. This suggested internal nimbyism, but also the likelihood that people live where they can afford. In the focus group, one chapter leader stated: "I live here because my family is here, and my family is diminishing because they can't afford to be here. They keep moving over the mountain (personal communication, 2 April 2019)." This movement shows further regionalism in housing issues, as well as a need for regional solutions.
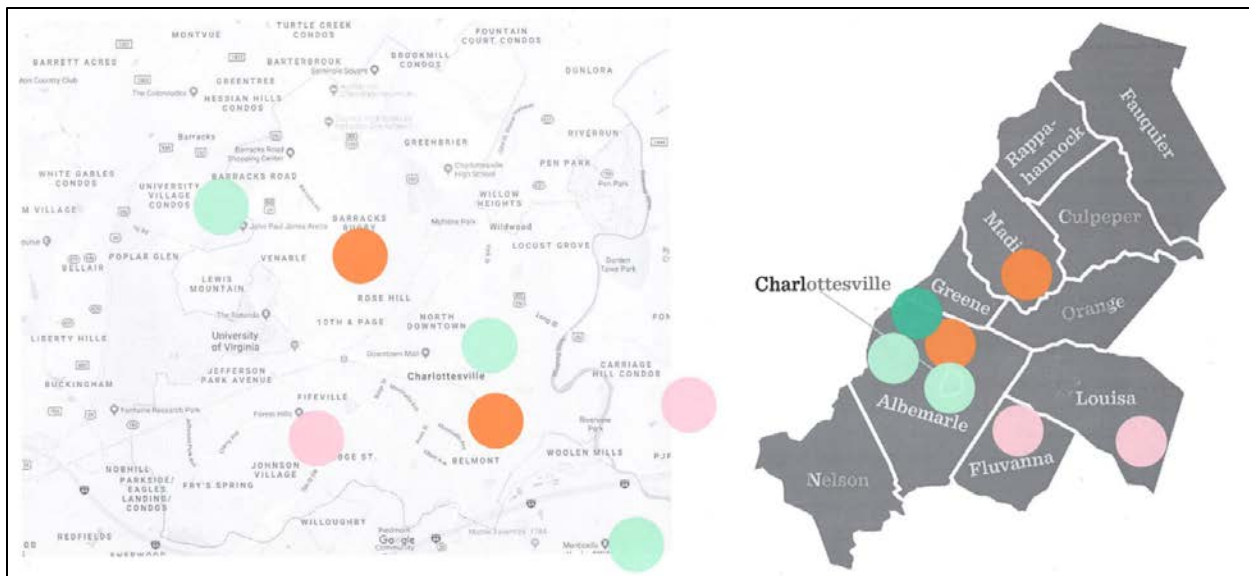
Figure 7. Virginia Organizing Charlottesville Chapter Mapping Exercise, completed 2 April 2019

Internal Capacity

Capacity is the ability to "get things done," as defined by a chapter member in their response to survey question 1 (Charlottesville chapter member survey, 28 March & 2 April 2019). When tackling issues of internal capacity, one surveyed chapter member suggested "adding members, especially directly affected ones" as a potential solution. Another member pointed out capacity is difficult to build or maintain when "the people needing to be served are moving out of Charlottesville." This regional dispersion was also apparent in the qualitative mapping exercise; each one had dots covering the region and city, which showed the difficulty in addressing moving populations. However, chapter members also responded to survey question 9 with suggestions such as "partnering could help us become for effective," "diversity [is needed]," and "[we should] continue to partner with other local organizations for common causes." Each of these suggestions supports the internal capacity of the chapter while also, in some way, supporting external capacity by strengthening the regional infrastructure.

Members also responded that the chapter should "encourage membership of non-white/cisgender Charlottesvillians," presumably to aid the chapter in adding diversity and representing the community. Observation at the chapter meeting on 2 April 2019 revealed a chapter with some new members and membership that was about half retired white individuals. The organizers had opinions and suggestions for building internal capacity, which included Szakos' point that "VO sits on a lot of money because we collect donations for 40 other

organizations…we want to leverage the money we have in the bank (personal communication, 2 April 2019)." This funding component was also mentioned by who discussed Virginia Organizing having loaned to Greater Charlottesville Habitat for Humanity in the past (personal communication, 19 March 2019). Johns also discussed the history of housing campaigns led by Virginia Organizing across the state, from their first VHDA campaign to the successful push to hire a Fair Housing Officer in Petersburg. He also mentioned the housing education completed in Southwest Virginia around predatory loans and weatherizing, as well as the inclusionary zoning campaign in Williamsburg and James City County. These historical campaigns show that building internal capacity to achieve housing goals is not new to Virginia Organizing and is well within their capabilities. Furthermore, this internal capacity building is mentioned in the *2019 Organizing Plan* at length, where it is required that organizers recruit new and directly affected individuals.

External Capacity

External capacity was recognized as a major area to build by planners, organizers, and non-profit representatives. A local planner claimed, "[we] did a plan for a city that no longer exists (personal communication, 2 April 2019)." This admission, however, was explained in the planner's discussion of plan rewrites and the recent hiring of a new planner to work on housing. Each interviewee pointed to the broad network of non-profits and government agencies working on affordable housing in some capacity, to include Charlottesville Low Income Housing Coalition (CLIHC), Charlottesville Housing Advisory Committee (CHAC), Albemarle Housing Improvement Program, Inc. (AHIP), Piedmont Housing Alliance (PHA), Greater Charlottesville Habitat for Humanity, and Charlottesville Redevelopment and Housing Authority (CRHA). Discussion of this network resulted in one non-profit representative stating, "after August 2017, housing has become the call to action, and that energy has sustained (personal communication, 5 April 2019)." Another non-profit representative added "people are assets" and the new goal in this environment is "about creating a process as much as a product (personal communication, 2 April 2019)."

Although the non-profit network in Charlottesville is trying to find a unified direction, Johns emphasized the need to engage the city, claiming, "If we do our work well then we're building relationships with city staff (personal communication, 19 March 2019)." Szakos,

however, expands upon the non-profit network and city as stakeholders by adding the importance of the development community. He says, "At the end of the day, you need money and builders and land and glue… [building in Charlottesville] would be a smart strategy for low income developers but there isn't capacity… [as] small developers have trouble moving money (personal communication, 2 April 2019)." External capacity in Charlottesville is strong because of the high number of non-profits interested in and working on affordable housing. However, organizers, planners, and non-profit representatives point out the need for direction. While the events of August 12, 2017 have energized the Charlottesville region, there are still capacity issues. One regional planner remarked, "even though we're two weeks away, we've only had five of the 140 planners in the region RSVP to the housing summit (personal communication, 2 April 2019)." The need for capacity is prevalent in each of these stakeholder groups, from planners to organizers and non-profits.

Time and Expectations

Issues concerning time and expectations were discussed throughout the research, however, without the tension present in the Fredericksburg region. Chapter members specifically spoke to government processes as being difficult to navigate as a community member because "people don't want to get a bad reaction or [be] yelled at, so they aren't going [to the meetings] (personal communication, 2 April 2019)." One chapter member survey suggested the city "should convene hearings where people in unaffordable housing have a say," showing a community expectation that directly affected people are involved (Charlottesville chapter member survey, 28 March & 2 April 2019). From the organizer perspective, Johns agreed with his chapter members in his opinion that the decision making process must "make sure that folks affected by an issue have a role in the solution (personal communication, 19 March 2019)." Johns also put forth the expectation that "winning is power, relationships, and accountability." The addition of time to these expectations was also made. A non-profit representative mentioned that deploying resources without a long-term goal causes tension (personal communication, 5 April 2019). Opinion on part of chapter members, organizers, and the non-profit community is that there must be a clear expectation set in the housing conversation. They also stipulate that the solution making process should include directly

affected people from the beginning through to solutions; this sets a requirement for engagement over time.

The planning community in the Charlottesville region supports the opinions above, particularly TJPDC staff who set their expectation for affordable housing as "moving from struggling to surviving to thriving (personal communication, 2 April 2019)." This was supplemented by the suggestion that "you have to link advocacy to dollars in a way where it translates to developers." Setting an expectation that developers are part of the conversation and made aware of links between their work and the community. A local planner further commented that "Charlottesville is switching from a large town to small city, and there's growing pains (personal communication, 2 April 2019)." These growing pains are tensions emerging from differences in time and expectations, particularly when the city does not follow through. Because, as in the planner's view, it is hypocritical. Community engagement on housing is a process driven by expectation, but also one sensitive to it. Stakeholders in Charlottesville are in general agreement that there must be inclusion, goal-setting, and a long-term view.

Power and Roles

Power and roles emerged as a theme in the Charlottesville region. Organizers took the stance that on housing work "administratively, the city is not there but the politics are (personal communication, 2 April 2019)." While politics are pushing housing as an issue, city staff has faced a number of internal political struggles and staff turnover since August 12, 2017. A local city planner addressed politics in the region by suggesting that while "affluent people can make it to the meeting, low income people often can't… [but] organizing can bring that viewpoint into the room;" a suggestion greatly aiding the housing work planners wish to complete. Power on the planning side, though, is complicated and often lacking. TJPDC staff claimed "housing feels like every organization and the kitchen sink." Made harder considering the housing coordinator is a part-time position. Similarly, despite having recently hired a housing planner, a local planner pointed out that local government is "still figuring out [their] role (personal communication, 2 April 2019)." Planners and organizers agree in the Charlottesville region about their roles and powers of each. Generally, planners and organizers also agree that there are aspects of planning that need to be operationalized. When asked about the intersection of planning and organizing, Johns said, "I wish there was a bigger intersection […] people haven't

been able to organize the plan [and] planners can't connect to the community (personal communication, 19 March 2019)." The power of community members, planners, and organizers are intertwined in Charlottesville. This power relationship is recognized as potentially beneficial to all parties, with the suggestion that they work together to produce better outcomes.

Conclusion

The Charlottesville case study region is a medium capacity ecosystem. There are many non-profits actively working on the ground toward affordable housing goals. While Virginia Organizing has not started a campaign, there is a conversation happening. Regionalism is recognized as necessary, but also difficult due to the number of parties involved. Internal capacity is necessary to proceed as well as clear goals and time constraints. The understanding of roles and power by all stakeholder groups is fairly consistent in this region, however, it is identified by organizers that increased community power is vital to balancing the engagement process from start to finish. Planners in this region are receptive to organizing and agree that a larger, more concrete visioning process must take place. There is movement toward this goal, particularly in the planning community as shown in the recent housing summit. However, local government is still working internally to identify its role. This makes regional goal-setting and opportunity identification difficult.

Best Practices

Best practices research consisted of seven interviews with individuals located in Washington, D.C. and Richmond, Virginia. Four of these interviews addressed the Housing For All campaign in Washington, D.C. and Richmonders Involved to Strengthen our Communities in Richmond, Virginia. The remaining three interviews were conducted with individuals working in the intersection of planning and organizing, including Nik Belanger who is the Organizing Director at Virginia Organizing. These interviews relayed information used to direct the recommendations and build the replicable model.

Housing For All in Washington, D.C.

The Housing For All campaign in Washington, D.C. was started in 2010 under the Coalition for Nonprofit Housing and Economic Development (CNHED, 2016). Organizing

began in 2011 and combined 100 organizations into a coalition. The coalition pushed for the city to make an annual commitment of $100 million in funding for the Housing Production Trust Fund; they were successful (p. 1). Two interviews were conducted with organizing staff at the Housing For All campaign and revealed several challenges and recommendations. The main issues faced included the organization of 100 different coalition members. Staff suggested making sure "that when you enter a meeting, that each understand [their] role and importance (personal communication, 1 April 2019)." Coalition work is difficult and members need to know the collective mission is as important as their individual missions. Another challenge the campaign faced included the understanding and value placed on the continuum of housing. Staff mentioned "[organizations] sometimes get stuck on what they do" and forget that their individual work is only a piece of the continuum.

Further advice offered included "try[ing] to get as much engagement as possible… meet people where they are… or at least understand where they are." This second piece is key to building internal and external capacity, which was repeatedly emphasized in interviews. Staff also pointed out the issue of setting limits on organizing goals with the lack of succession planning, exclaiming that you "need to do the next steps, [you] need to look strategic." Similarly, another staff member pointed out that "in [the campaign's] success it allowed the government to do some things but not other things (personal communication, 5 April 2019)." Recognizing the role of government was also mentioned as a best practice, particularly the role of planners in the process. Planners were viewed as "not exactly adversarial but [also] not producing solutions together [with organizers]." Their role was complicated, too, due their "crazy long view," which makes the planning process slow and long-range. Although planners sometimes supported the goals of Housing For All, organizing staff highlighted funding as the best means of city support. The funding of the trust fund and organizers were both paramount to the success of the campaign, as "people will build affordable housing if there's money for it."

Additional contributing factors to the success of Housing For All included the attention paid to politically advantageous moments and national trends. Despite not pursuing regional goals due to the issue of state lines, organizing staff had regional suggestions. Namely, they recommended that "[you] need to bring people in to do more together." Staff further mentioned the need to "take a long view" but also "figure out those short wins" to keep people energized. Those small wins could include a staff position, one time trust fund donation, or organizing

funding. Organizing staff made the point that small wins could include organizing around planning and policy gaps, which was the main success of Housing For All. The trust fund bill had already been passed in the city, but was unfunded. They began the campaign in the midst of the recession, and yet were able to ask for funding because of the capacity the coalition had. This capacity was largely due to "people [understanding] what they're fighting for." The Housing For All campaign was successful because it brought together over 100 organizations and fought for a common goal – funding the Housing Production Trust Fund. Organizing staff paid attention to the need to focus on horizontal rather than vertical decision making as well as ensuring "this was a resident campaign."

Best practices from this case include ensuring resident led action, capitalizing on politically advantageous moments, and coalition building as a means to accomplish difficult goals. Organizing staff made sure to point out the need for small wins and a mission that brings people together. Staff encouraged regionalism and scaling up, especially because "affordable housing has moved from an urban problem to a national one." Recognizing this, staff suggests engaging multiple constituencies to include those with individual needs in addition to non-profit developers. By engaging both and building a coalition, capacity is expanded and the mission more inclusive. Approaching the city with a coalition shows a wide range of support.

Richmonders Involved to Strengthen our Communities in Richmond, Virginia

Richmonders Involved to Strengthen our Communities (RISC) is a faith based organizing group in the City of Richmond, Virginia that has 22 member congregations. RISC was identified as a best practice and researched through interviews. Interviews conducted included one with a RISC member and another with a member of their organizing staff. Similar to the Housing For All campaign, RISC led a campaign to fund Richmond's Affordable Housing Trust Fund. They advocated for $1 million added to the city's trust fund for a number of years following the original campaign kickoff in 2010. The campaign was started in 2010 because members identified affordable housing as a major issue they wished to campaign on that year. In researching affordable housing in Richmond, they found an ordinance passed for a trust fund that had gone unfunded. They decided to resurrect it. In 2014, RISC was able to obtain the first dedicated allocation of money from the city. One RISC member viewed this initial success as a moment "when the mechanisms got into place [and] started fit[ting] together (personal

communication, 5 April 2019)." The member recognized the need to build capacity to further the mission, particularly by "turning a skeptic into an ally," a strategy, which helped gain political support for funding the trust fund.

Additionally, the member recounted how they had counted member hours spent on the campaign to show the amount of work completed when interfacing with the city and politicians. Building a case by utilizing smaller wins was cited as the only way to sustain "the long haul…sometimes 10 to 20 years." This long haul includes the scaling up to regional efforts. The member, though, reported that "the only way we'll get into Henrico is by having an example [in] the city." The RISC staff member echoed this thought, but also mentioned that "the counties are not as easy to come to the table," as shown in RISC's choice not to pursue regional housing work at this time. The staff member also spoke to internal capacity issues with members often lacking a regional view and instead looking at individual counties or the city. This is made more difficult by the coalition nature of the work with over 20 member congregations. Despite this, there is an aspect of regionalism, just "locality by locality." RISC has gained member congregations in surrounding counties with actions in Henrico County in 2014 and Chesterfield County in 2016.

Tackling issues by individual locality also requires capacity to be built internally. The staff members mentioned that by "promoting equity internally, the capacity gap outside the organization is [addressed] because credibility was built." External capacity is also affected, in the staff member's opinion, by the "political culture of always waiting to do studies and then do more studies." The inability to act in local government impacts people wanting to "show up." However, RISC takes advantage of movement toward a goal in government. The staff member pointed out that politicians and planners trying to "do the right thing" are supported by RISC "provid[ing] the cover." RISC's role in Richmond is well understood, but less so outside the city. Scaling up to the region is desired by membership and staff, but is difficult. Building capacity regionally and internally is recognized as a requirement for regional organizing.

One issue of internal capacity faced includes "promot[ing] equity internally," a process that asks organizers to ensure their chapter resembles the community and elevates the voices of directly affected individuals. An additional membership goal, as mentioned by staff, is to "mediate between what is good policy and what people say they want." This cuts to the heart of internal biases inside membership. In advocating for policy change, the organizer must evaluate

what may be affecting member's perceptions. External capacity and relationships are also difficult. Despite building relationships with the city, RISC membership maintains that they are often in tension. Staff add that while the relationship can be mutually beneficial, RISC "must still hold them accountable." The timeline of RISC differs from that of the city, which RISC addresses by setting expectations at their Nehemiah Action each May where they ask for political commitments. Best practices include recognizing the power of partnership, the capacity requirements to scale up to the region, and the political cover organizing can provide likeminded politicians and civil servants. A key best practice found in the RISC study is to treat the membership work hours as professional, which builds a sound case for their goals and signals value to the membership.

Additional Individuals

Three interviews were conducted with individuals who work in the intersection of planning and organizing. One of these individuals is Nik Belanger, the Organizing Director at Virginia Organizing. The interview with Belanger was conducted to gauge the role this plan's recommendations can play inside the larger organizing framework of Virginia Organizing. Belanger offered insight into his role as one where he "rarely directs the ask (personal communication, 5 April 2019)." He stated that Virginia Organizing chapters have significant autonomy, which results in him pushing each at a different pace. The pace of each chapter is largely dependent on the capacity. Belanger spoke to the groundwork necessary to begin a campaign as including "a strong organizer and a strong chapter," particularly to accomplish multi-faceted work. In the organizing model, reconciling longevity with campaign wins is crucial. Belanger noted that planners are on a "parallel but different track," asking "how do we get them together?" Planners are then, in organizing work, a potential channel of local government to engage. However, organizers must require accountability from planners. Belanger noted that while Virginia Organizing is not an administering organization, they are open to alternatives that enforce accountability.

Further best practices research includes a recommendation from one individual that there needs to be a "more open and inclusive process…not just meetings [but] going where the community meets (personal communication, 8 April 2019)." This is not only a suggestion for governments, but non-profits and organizers as well. The individual further stated that

"cultivating the leadership to work on the development" is vital. Empowering community members and cultivating leadership is not impossible to do. However, capacity must be built before organizing because it is a precursor, it is a stage where "people learn about local government." The individual furthered this point by noting, "The general public knows less about planning and more about community;" making organizing more of a common tongue than planning. As stated by another individual, community buy-in is furthered when residents are included – planning succeeds when people see the correlation between their voices and change (personal communication, 22 February 2019). Success is even more likely when a group, like Virginia Organizing, leaves a community with a "stool" of buy-in, leadership, and capacity in place. The stool further requires an on-the-ground non-profit, residents, and the city to ensure its success. After winning a campaign, it is vital this stool is set in place; without it, there is a lack of management of what the campaign won.

Conclusions

Campaigning is a long a difficult process. It requires organizers to evaluate their internal and external capacity repeatedly, it asks a community to remain engaged over time, and it pushes action when there is stagnation in government. People often know more about the community, which is the basis of organizing, than they do about planning and the mechanisms of local government. Recognizing this, organizing needs to include thought to the facilitation of a win; there must be implementation of the stool by an on-the-ground non-profit, residents, and the city with the expectation that they manage what has been gained. Finishing a campaign also means exiting a conversation. Setting up a facilitation or a management mechanism at the conclusion of housing campaigns sets the stage for continuing success without continued organizing intervention.

Research Findings Conclusions

The research produced major themes, including: (i) regionalism, (ii) internal and external capacity, (iii) time and expectations, and (iv) power and roles. When analyzed, these themes produce a relationship. As explained in *Figure 8*, good regional organizing addresses building internal and external capacity, setting time and expectations requirements, and balancing power and roles.
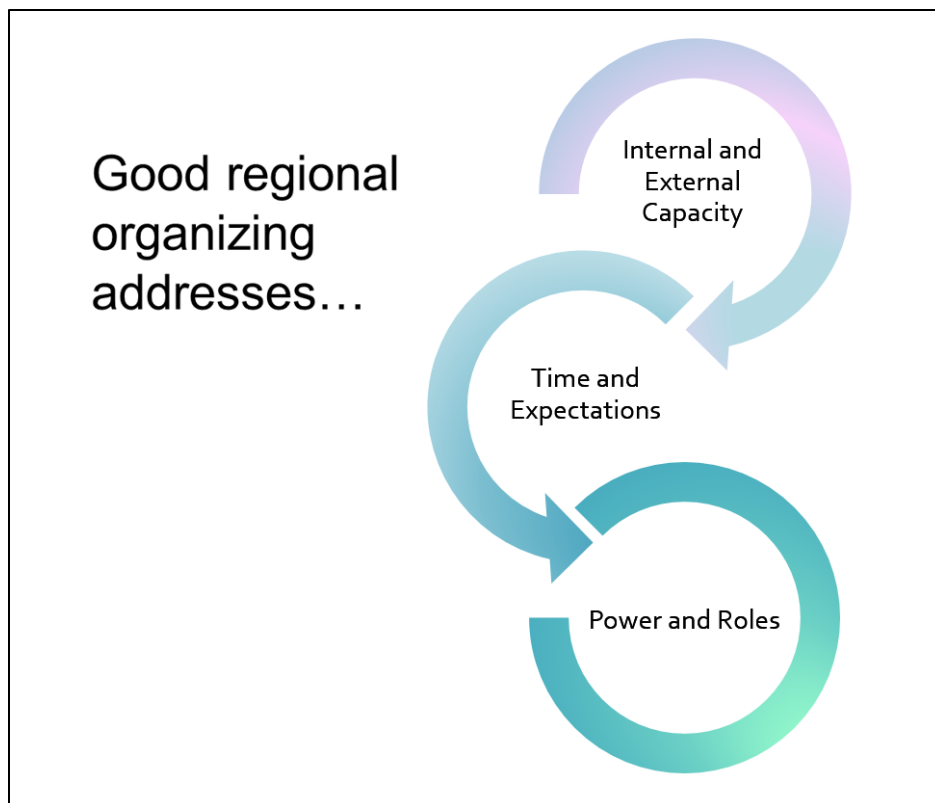
Figure 8. Relationships in Regional Organizing

The relationships between internal and external capacity, time and expectations, and power and roles are complex. The emergence of these themes in organizing work largely depend on each other and require organizers to examine and consider them closely. Consideration of time and expectations is also necessary in organizing work, particularly when working with multiple stakeholders. Communicating a consistent and clear timeline and expectation is important, too, because of the number of stakeholders involved in housing work. There are competing ideas and ideals, which often lead to difficulty in time management and goal setting by both the chapter and larger ecosystem. By setting these expectations, the organizer and chapter can communicate in a productive manner with an emphasis on staying focused. The power and roles of different stakeholder groups is also a source of contention that must be examined in organizing work. Balancing power and roles is critical to ensuring there is an equitable distribution of power inside the chapter, and that equity is moved forward in goals and interactions with other stakeholders.

At the top of this figure, though, is internal and external capacity. Capacity building is a requirement of organizing work, as it is the ability to complete the mission. Therefore, when setting goals, organizers must consider the level of capacity that exists. Internally, organizers must consider the capacity of their chapters from size of membership to the empowering of directly affected individuals and the internal biases of members. Externally, organizers must consider the capacity of local government and the larger ecosystem of non-profits working on housing. When beginning a regional housing campaign, capacity was found to dictate the goal selection process more than any other factor. Issues of time, expectations, power, and roles are largely indicators of capacity issues. Therefore, the research suggests that in building capacity a chapter must build the infrastructure to address these other issues. Once capacity is built and that infrastructure in place, campaigns can scale up. Regionalism then is a direct result of the intricacies of capacity.

When considering a housing campaign, research findings in this plan ask an organizer to consider the relationship explained in Figure 8. The multifaceted approach of housing campaigns, and the sheer scope of the work if scaled up to the region, requires a strong chapter and strong organizer. To prepare for this work, the findings encourage groundwork to be completed. The best practices research revealed the strategy of small wins that organizers should consider. These findings support capitalizing on "low-hanging fruit" or gaps in planning as a starting place for organizing. Best practices support scaling-up to the region, but only if there is the capacity to do so and past wins to use as examples.

V. Recommendations

Vision Statement

Virginia Organizing is committed to ensuring that citizens of the Commonwealth are able to afford adequate housing. Virginia Organizing will pursue housing campaigns across Virginia in a manner that is appropriate for each individual locality, region, and chapter to undertake. Campaigns will be equitable and focused on providing long-term sustainable solutions. The campaigns will utilize capacity building to elevate the power of the community when scaling up to the region.

Recommendations

Overall, Virginia Organizing chapters need to focus on "low-hanging fruit," which includes smaller goals. In doing this, members are given hope and directly affected people remain engaged over time. These smaller wins also show local governments the success of organizing. This "low-hanging fruit" can include organizing around planning gaps; for instance, the *Stafford County Comprehensive Plan* includes a list of housing goals that could offer regional organizing opportunity (Stafford County, 2016, p. 2-24&2-25). Similarly, the *Spotsylvania County Comprehensive Plan* (2013, p.5) identifies the need for affordable units as part of building "diverse housing inventory;" a goal further repeated in the *Albemarle County Comprehensive Plan* (2015, p. 9.1). These planning gaps offer potential for scaling up housing work once there are wins in Charlottesville and Fredericksburg. However, they are only one example of how the plan recommendations can be operationalized. The recommendations support the goal of creating a replicable model by laying the groundwork, building capacity, and creating sustainable strategies. The goals, objectives, and actions address regionalism in regard to capacity, time and expectations, and power and roles.

Goals, Objectives, and Actions

The goals, objectives, and actions are designed to support the replicable model. The four goals of this plan are to (i) develop a regional approach to housing, (ii) implement techniques to scale-up, (iii) build capacity to sustain a long-term campaign, and (iv) create community buy-in, capacity, and leadership. These goals are then broken down into objectives with specific actions designed to complete the objective and further the goal. Explanation of goals and objectives is

included to place the actions in context. Each of these goals, objectives, and actions is applicable to a housing campaign. These recommendations are designed for Virginia Organizing's to use in future housing campaigns. Additionally, the recommendations form the framework that houses the replicable model.

Goal 1: Develop a Regional Approach to Housing

The borders of cities do not contain housing issues or the membership of a Virginia Organizing chapter. A regional approach to housing incorporates more directly affected individuals and is more likely to succeed due to the depth of the campaign.

❖ Objective 1.1: Create a Regional Organizational Strategy

By incorporating regionalism from the beginning of a housing campaign, the concerns of members from outside a city/county are addressed. Scaling-up requires a larger vision, which a regional organizational strategy accounts for.

➢ Action 1.1.1: Incorporate regionalism into the Organizing Plan process each year

➢ Action 1.1.2: Require organizers to include regional components to housing campaigns

➢ Action 1.1.3: Purposefully seek to involve community members from the region

➢ Action 1.1.4: Conduct a regional housing analysis

❖ Objective 1.2: Support the Strengthening of Regionalism

Housing campaigns involve many different constituencies and stakeholder groups. Regional cooperation does exist in Virginia, but needs assistance and "political cover" to be fully realized.

➢ Action 1.2.1: Campaign for accountability and participation in local planning district commission (PDC)

➢ Action 1.2.2: Engage with local jurisdictions and elected officials around regionalism

➢ Action 1.2.3: Unify regional community vision

Goal 2: Implement Techniques to Scale-Up

Scaling-up to the region is possible, but only after local campaigns are completed. The need to win smaller goals and "low-hanging fruit" will help organizers and chapters begin to take on regional campaigns. By implementing techniques to scale-up, campaign replicability and regionalism is produced.

❖ Objective 2.1: Require Succession Planning

Planning for future organizing work is vital to the replicability of a campaign. Thinking beyond the "win" allows for better organizing practice throughout and for replicability in other localities.

➢ Action 2.1.1: Think through the steps following the "win" from goal selection

➢ Action 2.1.2: Compile history and analysis of housing campaigns while campaigning

❖ Objective 2.2: Design Replicable Goals

Local and regional campaigns move forward goals in their specific area, but also show what is possible in Virginia. The chapter should work through the possibilities of different housing solutions to see what works for the area and what might require additional state-level organizing.

➢ Action 2.2.1: Push for local goals that are possible across the state

➢ Action 2.2.2: Undertake scenario planning as a chapter

Goal 3: Create Community Buy-in, Capacity, and Leadership

The groundwork of community buy-in, capacity, and leadership must be in place for Virginia Organizing to complete a campaign and cease work on the issue. These requirements ensure the success of the "win" over time by creating an environment capable of managing what was won without continued intervention.

❖ Objective 3.1: Foster an Environment of Power

Creating an environment led by community voice where stakeholders share power is crucial to the success of housing campaigns. Once set up, this environment can continue after Virginia Organizing completes its campaign.

➢ Action 3.1.1: Maintain community leadership and direction

➢ Action 3.1.2: Commit to furthering engagement beyond chapter to educate larger community

➢ Action 3.1.3: Ensure Virginia Organizing and affiliated non-profits, residents, and city are prepared to take over after win

❖ Objective 3.2: Educate Officials, Organizers, Leaders, and Members on Roles

Understanding the roles and power of different stakeholders leads to better organizing and cooperation. Continuing to discuss power throughout the campaign examines the external equity and capacity, which strengthens the network of stakeholders.

- ➤ Action 3.2.1: Commit to furthering the understanding of roles, particularly around elected/appointed/staff status
- ➤ Action 3.2.2: Identify the powers and responsibilities of all public officials
- ➤ Action 3.2.3: Discuss and question power with public and public officials
- ❖ Objective 3.3: Guarantee Equity and Inclusion at Each Step of the Organizing Process

     Internal equity and capacity should be guaranteed throughout the organizing process in order to maintain true community led campaigns. Strategies and actions should focus on developing equity and ensuring inclusion inside the chapter.
  - ➤ Action 3.3.1: Undertake power analysis that includes analysis of the chapter
  - ➤ Action 3.3.2: Develop strategies that address healing, reciprocity, and atonement
  - ➤ Action 3.3.3: Put community voice at the forefront of all interactions

Goal 4: Build Capacity to Sustain a Long-term Campaign

   Housing campaigns are often multi-faceted and long-term. In preparing for a housing campaign, organizers need to communicate the nature of these campaigns to their membership in order to develop the expectation of sustainability through capacity building.

- ❖ Objective 2.1: Foster Relationships in the Region

     Building regional relationships supports scaling-up of the housing campaign. These relationships build external capacity and lead to increased regional understanding and cooperation.
  - ➤ Action 2.1.1: Recruit community members affected by housing issues throughout the region
  - ➤ Action 2.1.2: Establish or join a coalition centered on housing
  - ➤ Action 2.1.3: Maintain contact with planning staff at the local and regional bodies
  - ➤ Action 2.1.4: Meet regularly with appointed officials to regional commission
- ❖ Objective 2.2: Develop Knowledge of Past and Future Housing Landscape

     Recognizing the past and future landscape of housing allows organizers to gain a fuller understanding. When identifying the community's vision, the chapter should consider institutional and community knowledge.
  - ➤ Action 2.2.1: Identify properties and areas of opportunity
  - ➤ Action 2.2.2: Identify planners' past and future housing strategy
  - ➤ Action 2.2.3: Establish vision of chapter members

❖ Objective 2.3: Foster Sustainability

A sustainable organizing model is vital to long-term housing campaigns. Expectations of longevity and continuous inclusion must be set.

➢ Action 2.3.1: Set tone of long-term campaign

➢ Action 2.3.3: Ensure community vision includes actions over time

➢ Action 2.3.4: Continuously include non-profit community in region

Replicable Model

The replicable model is housed in the framework of the recommendations. The model, shown in *Figure 9*, was developed from the research findings with focus on the best practices. The model relies on capacity to achieve larger and more difficult goals. In each column of capacity there are three examples of goals that can be pursued by level of difficulty. When a housing campaign is under consideration by a chapter, these goals should be looked at to understand what is possible depending on the assessed capacity. For instance, the Charlottesville chapter is in a medium capacity area due to the significant level of external capacity found. There are a number of non-profits working on housing issues in the region as well as government interest both locally and regionally. Additionally, the chapter has strong internal capacity due to its active membership and history of action in Charlottesville. Therefore, the Charlottesville chapter could complete goals in the "medium capacity" column.

In order to complete more difficult goals, a chapter must lay the appropriate groundwork. For example, the Fredericksburg chapter has completed a low difficulty and medium difficulty goal, which why they are currently tackling a high difficulty goal. The goals in the replicable model rely on the completion of the preceding goal to build the foundation necessary for later work. In the event that a chapter completes the goals in one column, they have then successfully built the infrastructure necessary to begin working in the next column. By building capacity, the chapter can take on increasingly difficult goals. Each goal can be scaled-up to the region, however, this is recommended only after there has been a local campaign won. Regionalism in Virginia is delicate and often in fledgling forms, which makes it difficult to campaign for. There is no regional government, only regional programs and planning district commissions (PDCs). Therefore, accountability and implementation at the regional level is difficult. However, once a clear goal has been accomplished then there is an example for the region. The model will aid

organizers as they move from policy to action and, ultimately, address local chapters and their surrounding regions.

Capacity → Goal Difficulty ↓	Low Capacity	Medium Capacity	High Capacity
Low Difficulty	Issue selection	Engage with city/county government on housing issues	Identify partners and engage them
Medium Difficulty	Add directly affected chapter members	Build off an already approved housing policy	Build a coalition with other suitable community organizations
High Difficulty	Campaign for a housing position in local government	Campaign for a specific housing policy	Campaign for multiple policies and/or increased funding

Figure 9. Replicable Model

VI. Implementation

The recommendations made will be implemented by Virginia Organizing. The replicable model is housed in the framework of these recommendations and is meant to aid organizers in goal setting. Organizers should address the internal and external capacity of their chapters when deciding on the goals they wish to pursue. While a chapter could pursue goals for a lower capacity area, they should not pursue goals that require more capacity than is currently present. The goal of the model is to help Virginia Organizing meet their regionalism goals by focusing on local chapters and their surrounding areas. Virginia Organizing can implement the plan by utilizing existing and potential partnerships and strategies, similar to their past campaigns and in agreement with their grassroots model. Currently, Virginia Organizing operates under the ethos of grassroots organizing with an emphasis on few national or statewide campaigns, preferring to focus energy on their individual local chapters. Implementation is possible by incorporating the plan recommendations into the current organizing model, including the *2018 Organizing Plan* and *2019 Organizing Plan*, and future state and local campaigns.

Partnering with other local organizations is a suggested path because it provides regional support where the chapter may not have capacity. This strategy, however, must be approached delicately to remain in agreement with Virginia Organizing's goal to rely less on coalitional work and instead "shift to more strategic partnerships (Virginia Organizing, 2018, p. 5)." Additionally, lobbying local governments for comprehensive plan amendments and the creation of a housing trust fund are potential avenues for plan implementation that works within the current organizational structure of planning departments. Furthermore, the exploration of a combined community land trust and land bank is particularly enticing, as the Commonwealth of Virginia has granted the ability for existing non-profits to act in this manner (Coman, 2018). Further suggestions include exploring planning gaps, such as goals that have not been implemented in comprehensive plans. The recommendations of this plan are found in the following table, which details the schedule of completion. There are four phases of implementation: (i) Preparation, (ii) Kick off, (iii) Intermediary, and (iv) Near Completion. Organizers should follow this schedule to ensure goal completion. Plan implementation addresses the chapter, non-profit ecosystem, and broader community; to win, we must include everyone in moving from policy to action.

	Phase 1 Preparation	Phase 2 Kickoff	Phase 3 Intermediary	Phase 4 Near Completion
Goal 1: Develop a Regional Approach to Housing				
Objective 1.1: Create a Regional Organizational Strategy				
Action 1.1.1: Incorporate regionalism into the Organizing Plan process each year	X	X	X	X
Action 1.1.2: Require organizers to include regional components in housing campaigns	X	X	X	X
Action 1.1.3: Purposefully seek to involve community members from the region	X	X	X	X
Action 1.1.4: Conduct a regional housing analysis	X			
Objective 1.2: Support the Strengthening of Regionalism				
Action 1.2.1: Campaign for accountability and participation in local planning district commission (PDC)			X	
Action 1.2.2: Engage with local jurisdictions and elected officials around regionalism	X	X	X	X
Action 1.2.3: Unify regional community vision	X	X	X	
Goal 2: Implement Techniques to Scale-Up				
Objective 2.1: Require Succession Planning				
Action 2.1.1: Think through the steps following the "win" from goal selection	X	X	X	X
Action 2.1.2: Compile history and analysis of housing campaigns while campaigning		X	X	
Objective 2.2: Design Replicable Goals				
Action 2.2.1: Push for local goals that are possible across the state	X		X	
Action 2.2.2: Undertake scenario planning as a chapter	X	X	X	
Goal 3: Create Community Buy-in, Capacity, and Leadership				
Objective 3.1: Foster an Environment of Power				
Action 3.1.1: Maintain community leadership and direction	X	X	X	X
Action 3.1.2: Commit to furthering engagement beyond chapter to educate larger community		X	X	X
Action 3.1.3: Ensure Virginia Organizing and affiliated non-profits, residents, and city are prepared to take over after win			X	X
Objective 3.2: Educate Officials, Organizers, Leaders, and Members on Roles				
Action 3.2.1: Commit to furthering the understanding of roles, particularly around elected/appointed/staff status		X		
Action 3.2.2: Identify the powers and responsibilities of all public officials	X	X	X	X
Action 3.2.3: Discuss and question power with public and public officials	X	X	X	X
Objective 3.3: Guarantee Equity and Inclusion at Each Step of the Organizing Process				
Action 3.3.1: Undertake power analysis that includes analysis of the chapter	X	X	X	
Action 3.3.2: Develop strategies that address healing, reciprocity, and atonement		X		X
Action 3.3.3: Put community voice at the forefront of all interactions	X	X	X	X
Goal 4: Build Capacity to Sustain a Long-term Campaign				
Objective 4.1: Foster Relationships in the Region				
Action 4.1.1: Recruit community members affected by housing issues throughout the region	X	X	X	X
Action 4.1.2: Establish or join a coalition centered on housing		X	X	X
Action 4.1.3: Maintain contact with planning staff at the local and regional bodies	X	X	X	X
Action 4.1.4: Meet regularly with appointed officials to regional commission	X	X	X	X
Objective 4.2: Develop Knowledge of Past and Future Housing Landscape				
Action 4.2.1: Identify properties and areas of opportunity	X			
Action 4.2.2: Identify planners' past and future housing strategy	X	X	X	X
Action 4.2.3: Establish vision of chapter members	X	X	X	
Objective 2.3: Foster Sustainability				
Action 4.3.1: Set tone of long-term campaign	X	X	X	X
Action 4.3.3: Ensure community vision includes actions over time	X	X	X	X
Action 4.3.4: Continuously include non-profit community in region	X	X	X	X

Table 3. Implementation Schedule

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