



## 2017-2019 SPAG Teleconference

### Summary

Tuesday, May 15, 2018

Staff Liaisons: Sylvia Bowen |

[sbowen@nahro.org](mailto:sbowen@nahro.org)

[www.nahro.org/nahro-strategic-planning-advisory-group](http://www.nahro.org/nahro-strategic-planning-advisory-group)

Presiding: Jennifer Bergman, Chair

---

#### **Blue Ocean Ideas**

Duane Hopkins provided SPAG members with two documents related to Blue Ocean—12 steps to navigate a red ocean to your blue ocean and the Blue Ocean tools and frameworks. Discussion was deferred because Duane was unable to participate in this call.

#### **Strategic Plan Monitoring**

Chair Bergman announced that Strategic Plan monitoring will not be an agenda item for monthly teleconferences nor face-to-face meetings, rather SPAG will convene separate, quarterly teleconferences for this purpose. Chairs will be invited to participate in these calls.

#### **Rebranding**

CEO Todman asked Communications Director Sylvia Gimenez to provide an update on rebranding activities scheduled for 2018-2019. Three-part rebranding strategy:

1. *Review, standardize and streamline current communications material*

A communications audit is underway – this is a review, classification and standardization of all digital and physical communications assets. As a part of this process, we have updated our style guide and created templates for email signatures and PowerPoint presentations. We are working to standardize and streamline both automated and marketing emails from Member Services, PD, Conferences and Certification and Accreditation. We are now transmitting only one conference email a week instead of two, and are working with PD to improve their emails. We have two new communications assets: an 85<sup>th</sup> anniversary logo and a new JOHCD website and email newsletter.

2. *Review/adjust outreach*

In some cases, we are increasing our communications outreach. We have distributed more press statements and we have run three major media campaigns on the tax credit, the capital and operating funds and the FY 2018 budget in the past six months. We are also increasing our Housing America outreach with more tweets, *Monitor* features and more press outreach.

### 3. *Create and implement communications plan*

This will be done after we have completed the two items above.

Ms. Todman commented that rebranding is not only tangible -- i.e., changing logo and colors -- it is also about having an experience that feels different. We hope this has been reflected via recent emails from the CEO and NAHRO staff and also at the Washington Conference.

#### **Blue Ocean Ideas**

##### **iNAHRO**

Will live inside the PD committee and the NAHRO staff for development. Updates will be presented to SPAG and the BOG as events warrant.

#### **Development Company/TA for Development**

Chair Bergman recalled at SPAG's April 22 meeting, most members felt it was more appropriate/practical for NAHRO to provide technical assistance (guidance) and mentoring to agencies that wanted to do *development*. However, Mark Thiele expressed an interest in exploring the formation of a "development company." Because Mark and Duane Hopkins who has knowledge of the *Blue Ocean Strategy*, were not on this call, Ms. Bergman suggested that we defer conversation regarding the development company concept and instead asked members to share their thoughts with respect to NAHRO providing technical assistance and mentoring.

#### **Comments:**

Andrew Lofton expressed support for NAHRO providing technical assistance/ mentoring and has reservations about the development approach. Vanessa Cooper, too, expressed support for the technical assistance/mentoring concept. It will provide an additional source of revenue; some members have the expertise and others need the expertise, so to share this knowledge would bring added value to NAHRO membership. Marty Ryan commented that the SATF expressed support for mentoring during a recent teleconference. Andy Rodriguez echoed Marty's comments relative to the value this would bring to small agencies. Many small agencies may want to become developers yet do not know where to start and do not have the staff to become engaged in development.

Ms. Bergman suggested this topic, *development company/TA* as an agenda item for SPAG's June 19 teleconference. She also shared it is her hope that this topic be incorporated into SATF discussions. Vanessa Cooper commented that because some members feel strongly about the risks involved in development, it is her hope that members will be willing to share their experiences

#### **Housing Platform vs. Housing Policy**

CEO Todman restated SPAG's collective thought on this topic as expressed at the April 22 meeting, which was that NAHRO should be proactive from a policy standpoint and address what a 2037 Housing Act could look like. Instead of being responsive from things coming from the Hill and HUD, focus on what we want and package that.

There was a concern that the group that proposed the idea at the Board retreat offered not only the creation of policy, but if we were to recreate the concept of a housing authority or a public housing, Section 8 experience, what would that look like using the past as a historical point of reference, 75+ years for public housing and about 30 years on Section 8 side. Ms. Todman noted this was a compelling thought and a solid blue ocean field in terms of what would we do if we were to scrap everything and go all the way back, how would we create the public housing authority for the future—would it have a board, would it be publicly owned.

Andrew Lofton shared re-dreaming or re-thinking what a housing authority might look like is intriguing. He inquired about the ultimate objective, which would help inform which direction NAHRO should take.

Ms. Todman responded the only end game that she can imagine now is a white paper or thought leadership piece that we would distribute. The idea would live inside SPAG until it matures as a thought and she envisions Housing, CR&D and IRGE playing a role.

Vanessa Cooper sees it as a “best practices” paper. We have to be careful about opening up the box because we may lose out to other structures. In CA there is an attempt to create other types of housing authorities; there is diversity (in her county) between housing authorities and between states in CA. The academic world has some research from a programmatic perspective.

Saeed Hajarizadeh shared that IRGE is often asked if the United States has a housing strategy. Their response has been to talk about the history of affordable and subsidized housing dating back to the 40s and 60s starting with the creation of HUD. IRGE thinks it would be good to talk about this topic. Canada just adopted a national housing strategy. We could look at their model, although they are smaller and fund their programs differently. There is the issue of “housing as a right,” which is being discussed at the United Nations level and between nations. The United States has not committed to this, obviously, and we have said that that we would create access to housing for all citizens

John Mahon expressed concern if skewed too heavily into one grouping—large, urban, and rural because one size does not fit all.

Vanessa Cooper shared her vision of a housing platform is three to four sentences with bullet points. The idea of the national industry body developing housing platform seems sensible. We can afford to take a stand, it might apply to large and small and has to include the discussion about housing as a right and who is going to provide housing.

Andrew Lofton commented he does not know if what Saeed said is different from what he had interpreted the concept to be and does not know if they are necessarily mutually exclusive. All of us have ideas of what could be better and what our constraints are. A laudable goal for all of us is to continue to try to identify those areas that are barriers that could be removed that would make our situation better. This is different from developing

housing policy or platform. We need to be very clear about what we will do and how to approach each question.

CEO Todman shared this is an iterative process and expressed the need for a decision point to continue the conversation in either direction (or both), which is needed in order to work with Chair Bergman on a work plan and how we get there.

Saeed informed the group that housing strategy and housing policy may be one of the themes for the 2019 International Forum, which will be held following the National Conference in San Antonio.

Ms. Todman said one beneficial outcome would be marketing IRGE and being able to pull together a body of work that talks about the different housing models around the world and having a good think and talk at the same time even if means that this becomes in the future a session where in addition to the forum there be an American day where we are learning about other countries' models and having conversations about it is a good place to be, which is not happening any place else in the industry.

Andrew Lofton shared it would be intriguing to him to have us rethink or look at different models throughout the international community and thinking about ours and what could be done better in that context would be of interest to him and would be of value in the end.

Chair Berman summarized ideas expressed during this teleconference: This is more than a housing platform with bullet points, it is looking at best practices making sure we are keeping in mind small vs. large housing authorities; looking at what other countries are doing; looking at what we say as housing authorities about housing as a right as a privilege; it really is not just about SHARP or what platform is based today ; looking at the future and maybe developing a white paper that would outline some best practices

Vanessa Cooper advised there are a number of academic papers that compare housing policy in different countries.

### **Next Steps**

Vanessa: share some of the academic papers with CEO Todman and Chair Bergman.

Saeed: provide information on the 2019 International Forum as it becomes available.

Discussion regarding housing strategy and housing platform may be a recurring agenda item over the next few months.

**June 19: Teleconference Agenda Items:** Five minutes each—rebranding and iNAHRO and discussion on housing platform vs. housing policy.

## **MISCELLANEOUS COMMENTS**

CEO Todman: (1) called attention to the new online JOHCD and urged members to review it and send their thoughts on how it looks and feels to herself or Communications Director Sylvia Gimenez; (2) SPAG will be asked to weigh in on whether or not NAHRO should form a (c) 4 or 6, per President's Richie's request. Staff is in the midst of examining and gathering additional information on this subject. Mike Gerber inquired if the Legislative Network would be involved in this discussion. Ms. Todman responded that while the creation of a new entity will live inside of SPAG, the Legislative Network will help shape the nature of the activities of a new entity.

---

**Participants:** President Richie and Senior Vice President Shaw. SPAG Members: Jennifer Bergman, John Mahon, Marsha Parham, Andy Rodriguez, Henrietta Snipes, Saeed Hajarizadeh, Marty Ryan, Mike Gerber, Harden Oldfield, Vanessa Cooper, Andrew Lofton, Matt Pike and Saeed Hajarizadeh, Stacy Spann for Mark Thiele. **NAHRO Staff:** Adrienne Todman and Sylvia Gimenez.

Next Teleconference: Tuesday, June 19: 3:30 to 4:30 ET

Next face-to-face meeting: Friday, July 27: 1:15 to 3:15 PM (San Francisco, CA)



## 2017-2019 SPAG Teleconference

### Summary

Tuesday, May 15, 2018

Staff Liaisons: Sylvia Bowen |

[sbowen@nahro.org](mailto:sbowen@nahro.org)

[www.nahro.org/nahro-strategic-planning-advisory-group](http://www.nahro.org/nahro-strategic-planning-advisory-group)

Presiding: Jennifer Bergman, Chair

---

#### **Blue Ocean Ideas**

Duane Hopkins provided SPAG members with two documents related to Blue Ocean—12 steps to navigate a red ocean to your blue ocean and the Blue Ocean tools and frameworks. Discussion was deferred because Duane was unable to participate in this call.

#### **Strategic Plan Monitoring**

Chair Bergman announced that Strategic Plan monitoring will not be an agenda item for monthly teleconferences nor face-to-face meetings, rather SPAG will convene separate, quarterly teleconferences for this purpose. Chairs will be invited to participate in these calls.

#### **Rebranding**

CEO Todman asked Communications Director Sylvia Gimenez to provide an update on rebranding activities scheduled for 2018-2019. Three-part rebranding strategy:

1. *Review, standardize and streamline current communications material*

A communications audit is underway – this is a review, classification and standardization of all digital and physical communications assets. As a part of this process, we have updated our style guide and created templates for email signatures and PowerPoint presentations. We are working to standardize and streamline both automated and marketing emails from Member Services, PD, Conferences and Certification and Accreditation. We are now transmitting only one conference email a week instead of two, and are working with PD to improve their emails. We have two new communications assets: an 85<sup>th</sup> anniversary logo and a new JOHCD website and email newsletter.

2. *Review/adjust outreach*

In some cases, we are increasing our communications outreach. We have distributed more press statements and we have run three major media campaigns on the tax credit, the capital and operating funds and the FY 2018 budget in the past six months. We are also increasing our Housing America outreach with more tweets, *Monitor* features and more press outreach.

### 3. *Create and implement communications plan*

This will be done after we have completed the two items above.

Ms. Todman commented that rebranding is not only tangible -- i.e., changing logo and colors -- it is also about having an experience that feels different. We hope this has been reflected via recent emails from the CEO and NAHRO staff and also at the Washington Conference.

#### **Blue Ocean Ideas**

##### **iNAHRO**

Will live inside the PD committee and the NAHRO staff for development. Updates will be presented to SPAG and the BOG as events warrant.

#### **Development Company/TA for Development**

Chair Bergman recalled at SPAG's April 22 meeting, most members felt it was more appropriate/practical for NAHRO to provide technical assistance (guidance) and mentoring to agencies that wanted to do *development*. However, Mark Thiele expressed an interest in exploring the formation of a "development company." Because Mark and Duane Hopkins who has knowledge of the *Blue Ocean Strategy*, were not on this call, Ms. Bergman suggested that we defer conversation regarding the development company concept and instead asked members to share their thoughts with respect to NAHRO providing technical assistance and mentoring.

#### **Comments:**

Andrew Lofton expressed support for NAHRO providing technical assistance/ mentoring and has reservations about the development approach. Vanessa Cooper, too, expressed support for the technical assistance/mentoring concept. It will provide an additional source of revenue; some members have the expertise and others need the expertise, so to share this knowledge would bring added value to NAHRO membership. Marty Ryan commented that the SATF expressed support for mentoring during a recent teleconference. Andy Rodriguez echoed Marty's comments relative to the value this would bring to small agencies. Many small agencies may want to become developers yet do not know where to start and do not have the staff to become engaged in development.

Ms. Bergman suggested this topic, *development company/TA* as an agenda item for SPAG's June 19 teleconference. She also shared it is her hope that this topic be incorporated into SATF discussions. Vanessa Cooper commented that because some members feel strongly about the risks involved in development, it is her hope that members will be willing to share their experiences

#### **Housing Platform vs. Housing Policy**

CEO Todman restated SPAG's collective thought on this topic as expressed at the April 22 meeting, which was that NAHRO should be proactive from a policy standpoint and address what a 2037 Housing Act could look like. Instead of being responsive from things coming from the Hill and HUD, focus on what we want and package that.

There was a concern that the group that proposed the idea at the Board retreat offered not only the creation of policy, but if we were to recreate the concept of a housing authority or a public housing, Section 8 experience, what would that look like using the past as a historical point of reference, 75+ years for public housing and about 30 years on Section 8 side. Ms. Todman noted this was a compelling thought and a solid blue ocean field in terms of what would we do if we were to scrap everything and go all the way back, how would we create the public housing authority for the future—would it have a board, would it be publicly owned.

Andrew Lofton shared re-dreaming or re-thinking what a housing authority might look like is intriguing. He inquired about the ultimate objective, which would help inform which direction NAHRO should take.

Ms. Todman responded the only end game that she can imagine now is a white paper or thought leadership piece that we would distribute. The idea would live inside SPAG until it matures as a thought and she envisions Housing, CR&D and IRGE playing a role.

Vanessa Cooper sees it as a “best practices” paper. We have to be careful about opening up the box because we may lose out to other structures. In CA there is an attempt to create other types of housing authorities; there is diversity (in her county) between housing authorities and between states in CA. The academic world has some research from a programmatic perspective.

Saeed Hajarizadeh shared that IRGE is often asked if the United States has a housing strategy. Their response has been to talk about the history of affordable and subsidized housing dating back to the 40s and 60s starting with the creation of HUD. IRGE thinks it would be good to talk about this topic. Canada just adopted a national housing strategy. We could look at their model, although they are smaller and fund their programs differently. There is the issue of “housing as a right,” which is being discussed at the United Nations level and between nations. The United States has not committed to this, obviously, and we have said that that we would create access to housing for all citizens

John Mahon expressed concern if skewed too heavily into one grouping—large, urban, and rural because one size does not fit all.

Vanessa Cooper shared her vision of a housing platform is three to four sentences with bullet points. The idea of the national industry body developing housing platform seems sensible. We can afford to take a stand, it might apply to large and small and has to include the discussion about housing as a right and who is going to provide housing.

Andrew Lofton commented he does not know if what Saeed said is different from what he had interpreted the concept to be and does not know if they are necessarily mutually exclusive. All of us have ideas of what could be better and what our constraints are. A laudable goal for all of us is to continue to try to identify those areas that are barriers that could be removed that would make our situation better. This is different from developing

housing policy or platform. We need to be very clear about what we will do and how to approach each question.

CEO Todman shared this is an iterative process and expressed the need for a decision point to continue the conversation in either direction (or both), which is needed in order to work with Chair Bergman on a work plan and how we get there.

Saeed informed the group that housing strategy and housing policy may be one of the themes for the 2019 International Forum, which will be held following the National Conference in San Antonio.

Ms. Todman said one beneficial outcome would be marketing IRGE and being able to pull together a body of work that talks about the different housing models around the world and having a good think and talk at the same time even if means that this becomes in the future a session where in addition to the forum there be an American day where we are learning about other countries' models and having conversations about it is a good place to be, which is not happening any place else in the industry.

Andrew Lofton shared it would be intriguing to him to have us rethink or look at different models throughout the international community and thinking about ours and what could be done better in that context would be of interest to him and would be of value in the end.

Chair Berman summarized ideas expressed during this teleconference: This is more than a housing platform with bullet points, it is looking at best practices making sure we are keeping in mind small vs. large housing authorities; looking at what other countries are doing; looking at what we say as housing authorities about housing as a right as a privilege; it really is not just about SHARP or what platform is based today ; looking at the future and maybe developing a white paper that would outline some best practices

Vanessa Cooper advised there are a number of academic papers that compare housing policy in different countries.

### **Next Steps**

Vanessa: share some of the academic papers with CEO Todman and Chair Bergman.

Saeed: provide information on the 2019 International Forum as it becomes available.

Discussion regarding housing strategy and housing platform may be a recurring agenda item over the next few months.

**June 19: Teleconference Agenda Items:** Five minutes each—rebranding and iNAHRO and discussion on housing platform vs. housing policy.

## **MISCELLANEOUS COMMENTS**

CEO Todman: (1) called attention to the new online JOHCD and urged members to review it and send their thoughts on how it looks and feels to herself or Communications Director Sylvia Gimenez; (2) SPAG will be asked to weigh in on whether or not NAHRO should form a (c) 4 or 6, per President's Richie's request. Staff is in the midst of examining and gathering additional information on this subject. Mike Gerber inquired if the Legislative Network would be involved in this discussion. Ms. Todman responded that while the creation of a new entity will live inside of SPAG, the Legislative Network will help shape the nature of the activities of a new entity.

---

**Participants:** President Richie and Senior Vice President Shaw. SPAG Members: Jennifer Bergman, John Mahon, Marsha Parham, Andy Rodriguez, Henrietta Snipes, Saeed Hajarizadeh, Marty Ryan, Mike Gerber, Harden Oldfield, Vanessa Cooper, Andrew Lofton, Matt Pike and Saeed Hajarizadeh, Stacy Spann for Mark Thiele. **NAHRO Staff:** Adrienne Todman and Sylvia Gimenez.

Next Teleconference: Tuesday, June 19: 3:30 to 4:30 ET

Next face-to-face meeting: Friday, July 27: 1:15 to 3:15 PM (San Francisco, CA)