



## 2017-2019 SPAG Teleconference Summary

Wednesday, Sept. 5, 2018

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**Presiding: Jennifer Bergman, Chair**

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### **Recap of July 27 Meeting in San Francisco**

Chair Bergman gave brief meeting summary highlights, which was sent to SPAG members prior to the teleconference.

### **Blue Ocean Strategy and RAD**

Marsha Parham-Green presented highlights of a concept paper on a Blue Ocean analysis of a *RAD Boot Camp* that she prepared for discussion during this teleconference.

### **Comments**

Duane Hopkins commended Marsha for preparing an excellent document. He described the boot camp initiative in Colorado, which has been ongoing for three to four years for tax credit projects. Community teams, the public housing agency and non-profits involved in the development come together for technical assistance, meetings and training. At the end, the team had a specific project and land identified, and the structure for an application prepared and ready for submission to the state allocating agency; basically, a turnkey project ready to go thru the application and development process.

With respect to RAD, NAHRO could offer a “boot camp” at the state level so that PHAS that have public housing units on the RAD the waitlist could come away with a turnkey application for HUD and a turnkey development application for tax credits or whatever else they need in order to move forward with development.

Mike Gerber echoed Duane’s comments and said that it would be powerful to pull people together from different disciplines. Because we are dealing with state-by-state allocations of tax credits, figuring out the mechanisms of each state’s rules becomes really important. NAHRO could serve as a clearinghouse for different development teams in different states. Most developers chose to regionalize. He suggested that we run our idea by groups of development partners who have worked with PHAs and get their take.

CEO Todman commented on CLPHA’s RAD collaborative concept, which was created several years ago as a boot camp at a policy driven, best practices level so people could share their experiences relative to their transactions with HUD and what was happening locally and lessons learned. It created a safe place to discuss RAD for people interested in it and wanted to know more about it. Meetings have occurred over the past couple of years where attorneys and agencies have shared some transactional information. There were also some policy level conversations, although not at the state level as described in Marsha’s concept paper. Whatever we do, at a minimum, we should complement what is already available so that it feels different for CLPHA members. Smaller agencies that have an interest in RAD may have a policy gap and capacity gap in terms of bringing on people to help them figure things out.

Sunny Shaw, too, commended Marsha for an excellent paper. She asked if CLPHA's concept was available to small agencies. Adrienne responded it has not been marketed nor tagged outside the CLPHA membership and CLPHA conference attendees/universe. She does not see a lot of competition, as the targeted audience for Marsha's concept would be different. Those who have availed themselves by learning through the CLPHA collaborative might be the kind of people we may want to use to help us deal with transactional matters at the local level.

Mike Gerber said that Austin is a member of CLPHA's RAD collaborative and has engaged with them on a policy level to work out issues in the PBRA and project-based voucher world; what keeps you in public housing or what puts you into multi-family, etc. NAHRO's Blue Ocean could be in medium-sized and smaller communities and helping development companies see the potential and possibilities. Saeed Hajarizadeh echoed Mike's comments and agreed that we should focus on helping small and medium-sized agencies that do not have the capacity.

Chair Bergman said what would be beneficial for medium- and small-sized agencies is to help them understand where to start and help them decide between PBRA and project-based. Ms. Todman shared that anything related to repurposing or reinvesting their assets, whether RAD or demo disposition rule would be useful. There is a lot of education needed for people who have not had to think of their assets this way. She envisions a boot camp where attendees would come prepared to talk very specifically about the site(s) they plan to transition. Attendees would be required to bring answers to several questions, i.e., which sites would be best suited for RAD; results of utility costs study, existing debt, etc. Questions/answers would help frame conversations with experts. Attendance would have to be limited and camps held in several states.

Chair Bergman suggested expanding the conversation to include demo/disposition or neither. CEO Todman thinks that reaching out to Stockton Williams, CEO of NCSHA in order to engage NCSHA members with NAHRO members. The boot camp could be one activity among several that includes technical assistance, mentoring and ongoing assistance to help people get across the line.

### **Next Steps**

Mike suggested reaching out to partners with whom agencies have worked: developers, consultants, etc., and ask them if we are framing the concept right and if they would support it.

Marsha committed to discussing the concept with Stacy Spann and others in her state who have experience in this area. Following that, she will seek input from Professional Development and SPAG (after PD). PD would be charged with curriculum development.

Regarding timing of a pilot, Adrienne suggested when we have something of quality, staff will figure out the right venue that makes sense to the customer and where they (customers) can go.

Ms. Todman cited what NAHRO is currently doing in the RAD space: on the ground training and webinars; in Atlanta there will be a day-long training on the compliance side on PBRA. We need to determine how to differentiate this intentional piece to a targeted audience. She commented that RAD is just one way for people to think about their assets and inquired if we should have a similar boot camp re demo and dispo or should the boot camp be a “big tent” for both.

Chair Bergman is uncertain if covering both would be too much. Marsha suggested that we first develop and pilot the RAD concept before trying to develop a similar camp re demo and dispo.

### **Consensus**

The consensus of the group was to put on the shelf the concept of Development Company/TA and later examine if the RAD concept addresses what came out of the BOG retreat.

Chair Bergman will review some of the resources on international housing policy provided by Vanessa Cooper, which we will use to frame our conversation on this topic.

### **Re-branding**

Adrienne highlighted items completed and/or underway:

- Re-framed look and feel of PD’s online offerings
- Purchased “table skirts” for PD (for use at tradeshow)
- Will unveil 85<sup>th</sup> anniversary collateral in Atlanta
- Updated “automated responses” sent after purchasing products/services
- Revised new agency member welcome letter
- Revised new MSC welcome letter
- Updated NAHRO benefits to members
- Social media growing – 300 a year ago; more than 1200 now
- More cautious and disciplined with respect to the number of emails sent to members
- Targeting specific media outlets
- Featured in Wall Street Journal and NY Times
- Increased inquiries from media seeking background information
- JOHCD online; have secured sponsorship \$\$ which will cover hard copy production of the next issue, which will feature Award winners and MSC
- Expect to execute contract with vendor to revamp the NAHRO website

Teleconference Participants: President Richie and Senior Vice President Shaw; Jennifer Bergman, Mark Thiele, John Mahon, Saeed Hajarizadeh, Andy Rodriguez, Harden Oldfield, Michael Gerber, Andrew Lofton, Duane Hopkins, G. Mathew Pike. Staff: Adrienne Todman and Sylvia Bowen

**Next Teleconference: Thursday, October 11 – 2:30-4:00 PM**  
**In Person Meeting—in conjunction with the National Conference**  
**October 25 -- 1:45-3:45 p.m., Topic: Housing Platform/Policy**