



Bloomington Housing Forward

Strategic Direction 2018 – 2030

We strengthen opportunity – beginning but not ending with housing



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Commissioners

Patrick Murray, Chair & SCIHO Liaison
William Hosea, Vice Chair

Sherry Clay,
Resident Council Representative

Elaine Amerson
Kevin Cade
Marilyn Skirvin, SCIHO Liaison
Lindsey A. Smith

❧ ❧

Executive Director

Amber Skoby



Bloomington Housing Forward: 2018 – 2030

Mission

We do housing. But, our focus is the resident – the person – first. As such the mission of the Bloomington Housing Authority is to:

Strengthen opportunity – beginning but not ending with housing.

Core Beliefs

Supporting that mission are core beliefs that:

- Everyone deserves safe, affordable housing free from discrimination;
- Supportive services are critical to resident success and opportunity;
- Such housing and services:
 - Prevent homelessness,
 - Lay a foundation for economic self-sustainability, and
 - Provide an appropriate long-term solution for key populations; and
- The future of affordable housing is integral to the future of the community overall.

We do housing but believe that creating “home” – more than housing – is fundamental to individual, family, and community well-being.

Operating Values

Because we start with the proposition that the dignity of residents and their quality of life come first – in our interactions, quality of housing, access to services – we:

- Treat residents with respect, care, and compassion;
- Communicate expectations clearly and bring others along with us;
- Serve others in a way that is fair, equitable, transparent, and proactive;
- Lead and collaborate with professionalism, integrity, accountability; and
- Pursue innovation, advance our own knowledge, and increase our sustainability.

Vision 2030

- Bloomington is a community with housing for all
- Bloomington residents are successful in housing
- BHA is an innovative leader, respected locally and nationally
- BHA is strong, sustainable and in control of its future

Strategic Direction

In order to achieve our vision, we will pursue three primary goals:

ADVANCE HOUSING ACCESS & CHOICE

- Preserve and improve access to quality affordable housing
- Diversify and expand housing choice and reach of assistance
- Advocate and lead as a catalyst for Bloomington’s housing vision

IMPROVE INDIVIDUAL HOUSING SUCCESS & COMMUNITY OUTCOMES

- Improve housing stability for individuals and families in programs
- Build self-sufficiency for individuals and families in programs
- Change public perception of our work, our community, our residents and their value

LEAD WITH EXCELLENCE, RESILIENCE & INNOVATION

- Implement mission with excellence, efficiency, and effectiveness
- Build organizational resilience, independence, and revenue diversity
- Cultivate innovation throughout BHA and our affiliates

Our Foundation

Mission

The mission of the Bloomington Housing Authority has long been to *administer public funds using available resources in a manner which will allow the Housing Authority to offer a variety of affordable housing opportunities and supportive services that foster stability and self-sufficiency through creative partnerships while servicing our customers with the highest level of professionalism and respect*. While all of this continues to hold true, a focus on administration of resources misses the mark. We do housing. But, our focus is the resident – the person – first. As such we:

Strengthen opportunity – beginning but not ending with housing.

Core Beliefs

Supporting that mission are core beliefs that:

- Everyone deserves safe, affordable housing free from discrimination;
- Supportive services are critical to resident success and opportunity;
- Such housing and services:
 - Prevent homelessness,
 - Lay a foundation for economic self-sustainability, and
 - Provide an appropriate long-term solution for key populations; and
- The future of affordable housing is integral to the future of the community overall.

We do housing but believe that creating “home” – more than housing – is fundamental to individual, family, and community well-being.

Operating Values

Because we start with the proposition that the dignity of residents and their quality of life come first – in our Interactions, quality of housing, access to services – we:

- Treat residents with the dignity, respect, care, and compassion they deserve;
- Communicate expectations clearly and bring others along with us;
- Serve others in a way that is fair, equitable, transparent, and proactive;
- Lead and collaborate with professionalism, integrity, accountability; and
- Pursue innovation, advance our own knowledge, and increase our sustainability.

We believe that adequate housing requires:

Secure Tenure: Residents have security of tenure that protects against forced evictions, harassment, and other threats, such as predatory redevelopment or displacement.

Services & Infrastructure: Housing provides safe drinking water; adequate sanitation; energy for cooking, heat, light, food storage; and refuse disposal.

Affordability: Housing costs are not at a level that they threaten or compromise the attainment and satisfaction of other basic needs.

Habitability: Residents have adequate space that protects them from cold, damp, heat, rain, wind, or other threats to health; structural hazards; and disease.

Accessibility: Housing is accessible. Disadvantaged and vulnerable groups have full access to housing resources.

Appropriate Location: Housing is not cut off from employment, health care, schools, childcare centers, or other social supports; nor is it in polluted or dangerous areas.

Cultural Adequacy: Housing and policies support expression of cultural identity and diversity, including the preservation of cultural landmarks and institutions.

Adapted from [Human Rights Fact Sheet No. 21 / Rev 1: The Right to Adequate Housing](#), Office of the United Nations High Commissioner for Human Rights (2009)

Our Community

The BHA was established in 1961 and the first development of affordable housing units was completed in 1968. Currently, the BHA employs a staff of 30 employees and provides housing assistance to over 2,500 Monroe County households each year. The BHA operates three affordable housing communities (312 total units) and provides more than 1,300 Housing Choice Vouchers, also known as Section 8 vouchers, which allow income eligible families to rent in the private market. Along with housing assistance, the BHA maintains active service coordination programs including the Family Self-Sufficiency Program and Step Up Program.

This work takes place in a city of approximately 84,000 (county of approximately 145,000) that has just over 33,000 housing units. But with high property and rental values (exacerbated by a large student population supporting high occupancy rates), a median income around \$31,250, and trends that suggest these difficulties are not improving; it is not surprising that BHA regularly has a wait list of over 1,000 households for its voucher program. More concerning still is a 2017 homeless count of 333. These market conditions of the area continue to make the need for affordable housing – particularly for low and extremely low income families, seniors, and disabled members of the community – a critical need for the health of greater Bloomington. BHA intends to be a significant player in addressing this need.

At the same time, BHA must maintain, renovate and continue to improve its three affordable housing communities to preserve the stock we have. Federal funding for public housing capital improvements has been virtually nonexistent for years – a situation that is not expected to change. The most recent assessment of BHA properties cites \$12.2 million in rehabilitation and renovations needed for 265 units and site renovations (Advantix Development Corporation). Median capital funds received from HUD from 2002 to 2018 was \$504,041 each year. Assuming the same funding pace, it would take over 24 years to complete the renovations already needed. While we are diligently moving forward at this pace, neither BHA Commissioners nor senior staff believe this is sustainable or the best option for our residents. A core objective of this planning process and the resulting plan was our search for a way to accelerate this process. The solution we found not only does that but does it while maintaining BHA control over the properties, protecting resident rights, attracting new resources to the community, and increasing the potential for new affordable housing development overall.

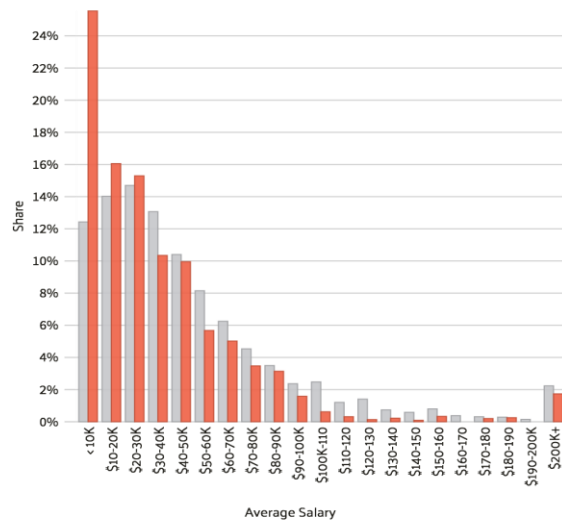
That is the economic news, but the “people” news is what is most important to us.

- Increasing access to affordable housing, making that access more immediate, and offering more choice
- Helping residents be good tenants, landlords good partners, and the community hold positive perceptions of both
- Empowering residents to achieve their self-sufficiency goals, age in place with dignity, and raise healthy families
- Preventing discrimination in housing, protecting against eviction, and improving environmental sustainability matters

These are the outcomes we focus on as we preserve and develop affordable housing. As such, these are the goals you will see focused on throughout the plan that follows.

Wage Distribution in Bloomington, in

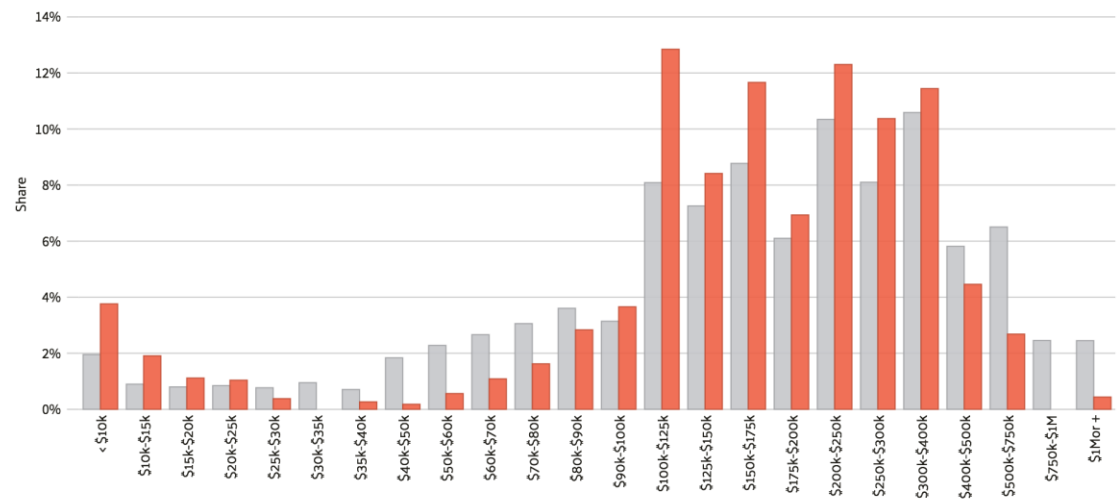
The closest comparable wage GINI for Bloomington, IN is from Bloomington City PUMA, IL



Dataset: ACS PUMS 1-year Estimate
Source: Census Bureau

DATAUSA:

Property Value in Bloomington, in



Dataset: ACS 5-year Estimate
Source: Census Bureau

DATAUSA:

Figure 6. Housing Type and Market Rent

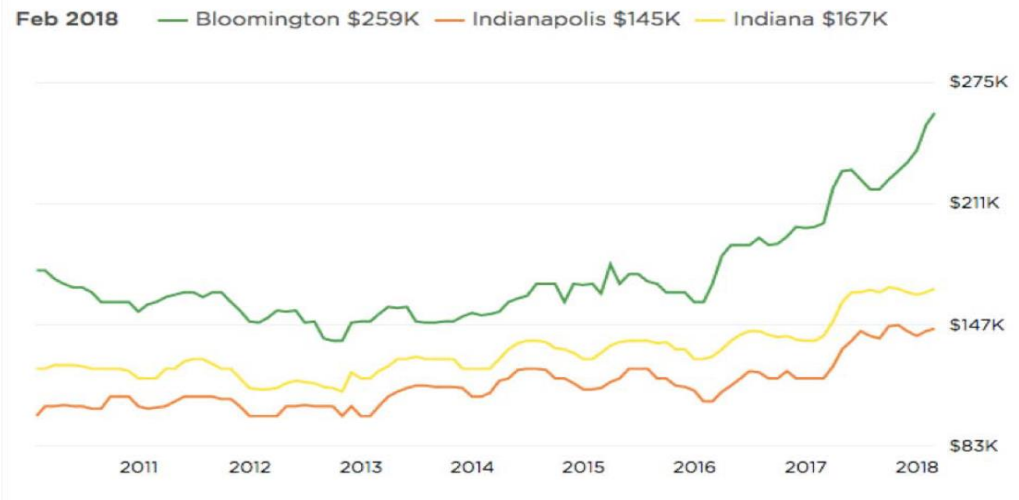
Unit type	Median market rent	Approximate income required	Estimate of family households that could afford market rents
One bedroom	\$675	\$27,000	75.7%
Two bedroom	\$1,050	\$42,000	66.2%
Three bedroom	\$1,300	\$52,000	56.5%

Sources: Trulia.com, 2018; ACS 2016 five-year estimates.

Source:

- Wage Distribution and Property Value tables from Bloomington Revealed: <https://www.bloomingtonrevealed.com/home/>
- Housing type / Rent and Median List Price tables from Bloomington, Indiana: Redevelopment Strategies for the Bloomington Hospital Site, April 8–13, 2018 (Urban Land Institute)

Figure 3. Median List Price for Homes in Bloomington, Indianapolis, and Indiana



Source: Zillow, ULI.

Our Future

Our vision for the future of our community and for ourselves as a successful, mission-driven organization is one in which:

BLOOMINGTON IS A COMMUNITY WITH HOUSING FOR ALL

There is housing choice for all. This requires:

- Continued renovation and maintenance of housing to ensure quality,
- Special attention to and support of diversity in programs,
- Additional stock (unit count, location, and diversity), and
- Increased affordability across income and service levels.

Public and subsidized housing meet local needs. Specifically:

- Communities that are safe and thriving with a sense of “home”;
- The stock is appropriate to population needs whether families, elderly, disabled, low-income, or extremely low-income;
- Landlords participate in subsidy programs; and
- Wait lists to access housing are shortened because of increased supply and rotating stock as residents achieve self-sufficiency.

BLOOMINGTON RESIDENTS ARE SUCCESSFUL IN HOUSING

There are pathways out of public and subsidized housing. Specifically:

- Residents see public housing to be a stepping stone,
- Agencies partner for coordinated services to residents, and
- Programs are available that respond to the evolving needs of residents and reducing barriers to housing.

The community supports success as follows:

- Affordability is a central concern in City planning and development
- The public views our work, community, and residents positively

Motivated and supported residents pursue individualized goals toward self-sufficiency (e.g., stability, good tenancy, ownership).

OUR INNOVATIVE LEADERSHIP IS RESPECTED – LOCALLY AND NATIONALLY

We are a catalyst for a comprehensive housing vision in Bloomington – not “just” an administrator of funds.

Our creative, entrepreneurial approach has resulted in:

- Sustained both the quality and reach of existing housing;
- Expanded access to and affordability of housing;
- Improved housing outcomes among our residents; and
- A sustainable operating model that is less dependent on federal support, adapts to community needs, and is nimble in a changing environment.

We recognize that success requires local engagement and partnership across sectors, including community development, government, business, philanthropy and others concerned with affordable housing.

BHA IS STRONG, SUSTAINABLE, AND IN CONTROL OF ITS FUTURE

We continue to enjoy the benefits of our “high performer” status with HUD.

We are financially resilient:

- Attracting diverse income streams and generating our own revenue,
- Maintaining financial reserves and access to flexible capital, and
- Continuously increased our efficiency so that it can expand our impact.

Our staff are trained, equipped, and supported as they pursue resident and organizational goals – and do so in a culture of creativity and innovation.

Our commissioners are engaged advocates for the work – they support a culture of creativity and innovation.

Our Path Forward

Strategic Direction

In order to achieve our vision, we will pursue three primary goals:

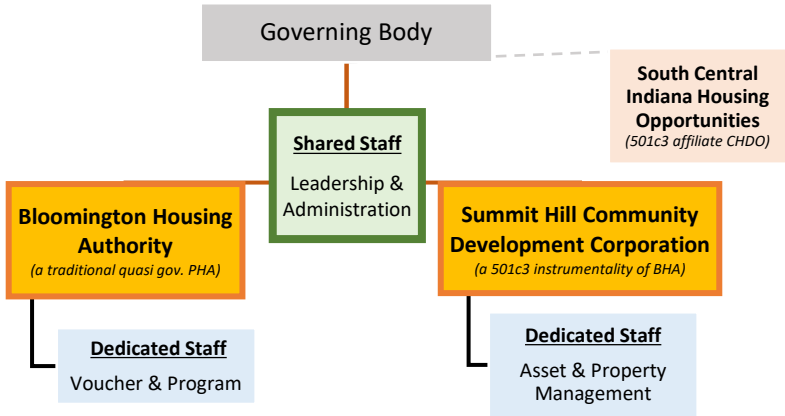
- Goal 1:** **ADVANCE HOUSING ACCESS & CHOICE**
 - Preserve and improve access to quality affordable housing
 - Diversify and expand housing choice and reach of assistance
 - Advocate and lead as a catalyst for Bloomington’s housing vision
- Goal 2:** **IMPROVE INDIVIDUAL HOUSING SUCCESS & COMMUNITY OUTCOMES**
 - Improve housing stability for individuals and families in programs
 - Build self-sufficiency for individuals and families in programs
 - Change public perception of our work, community, residents and their value
- Goal 3:** **LEAD WITH EXCELLENCE, RESILIENCE & INNOVATION**
 - Implement mission with excellence, efficiency, and effectiveness
 - Build organizational resilience, independence, and revenue diversity
 - Cultivate innovation throughout BHA and our affiliates

The strategies under each goal are described on pages 10-12.

Broad Shifts

Connecting the strategies under each of these goals are fundamental shifts in the way we work.

1. Bloomington Housing Authority Commissioners govern not just the BHA but a family of closely affiliated organizations pursuing a common plan (Bloomington Housing Forward: 2018 – 2030) using common strategies to achieve common goals;
2. Launch of Summit Hill Community Development Corporation under BHA auspices (controlled by BHA Commissioners) to support multiple goals;
3. Implementation of the Rental Assistance Demonstration Program (RAD) conversion process to infuse much needed capital improvement funding into Bloomington’s public housing, ensure its long-term affordability, protect resident rights, and increase BHA sustainability; and
4. Pursuit of Moving to Work (MTW) status Development, and subsequent implementation of its plan, to improve resident outcomes and increases BHA efficiency.

<p style="text-align: center;">1. Family of Closely Affiliated Organizations</p> <p>The BHA and Summit Hill CDC (an instrumentality of BHA) will be separate legal entities, with shared staff, and boards with identical membership. SCIHO, while founded by BHA, has only two board members in common with the BHA and is thus an affiliate.</p>  <pre> graph TD GB[Governing Body] -.- SCIHO[South Central Indiana Housing Opportunities (501c3 affiliate CHDO)] GB --- SS[Shared Staff Leadership & Administration] SS --- BHA[Bloomington Housing Authority (a traditional quasi gov. PHA)] SS --- SHCDC[Summit Hill Community Development Corporation (a 501c3 instrumentality of BHA)] BHA --- DS1[Dedicated Staff Voucher & Program] SHCDC --- DS2[Dedicated Staff Asset & Property Management] </pre>	<p style="text-align: center;">2. Summit Hill Community Development Corporation</p> <p>Summit Hill CDC will be a wholly controlled 501c3 instrumentality of the BHA, with our commissioners serving as its board of directors.</p> <p>We are forming it for three reasons (in order of implementation), to:</p> <ul style="list-style-type: none"> • Provide specialized property and tenant management services to other affordable housing providers in the community • Own, manage, and preserve high quality, affordable housing within BHA control • Expand the community’s access to affordable housing over time as a hub for resources, policy advocate, and/or property developer <p>As such it will pursue a mission – <i>provide housing as a foundation to advance resident opportunity and improve lives</i> – that is similar to that of the BHA.</p> <p>Summit Hill CDC will follow the same strategic plan as BHA as part of the Bloomington Housing Forward umbrella.</p>
<p style="text-align: center;">3. Rental Assistance Demonstration Program</p> <p>HUD’s Rental Assistance Demonstration (RAD) program was created in 2011 to “give public housing authorities a powerful tool to preserve and improve public housing properties.” It is a mechanism by which authorities transfer ownership of its property to a mission-driven affiliate in order to increase access to capital improvement funds, renovate properties, and preserve affordability for the community.</p> <p>A number of authorities have completed this process, learned from it and refined it already. Now HUD is expanding the reach of the program, and we assume all authorities may be required participate in the future.</p> <p>BHA believes conversion in the near-term is critical both to the Bloomington community’s needs and to controlling our destiny as a strong and sustainable agency.</p>	<p style="text-align: center;">4. Moving to Work Program</p> <p>HUD’s Moving to Work demonstration was authorized in 1996. It allows public housing authorities the flexibility to test innovative policies related to its three statutory goals, which are to:</p> <ul style="list-style-type: none"> • Increase cost effectiveness • Move residents to self-sufficiency • Expand housing options <p>MTW has already completed one wave of work and is expected to accept new applications in 2019. Should BHA be accepted as an MTW agency, it will be able to test our own innovations in each area. At the same time, HUD will grant BHA latitude in key statutory and regulatory requirements. As such, it will be critical to BHA’s internal capacity building and success across goals.</p>

Strategies for Success

While we develop and pursue detailed work plans, timelines, and measurements for each goal, the primary strategies for each goal are as described here.

GOAL **ADVANCE HOUSING ACCESS & CHOICE**
 VISION **Bloomington is a community with housing for all *(the home itself)***

Objective	Strategy
A. <u>PRESERVE & IMPROVE</u> access to quality affordable housing	<p><u>Maintain the physical number of BHA-controlled housing units</u></p> <ul style="list-style-type: none"> ✓ Pursue full RAD conversion to maintain, manage and improve existing BHA properties ✓ Work with development partners that add value to the BHA, share in our vision and have high design standards <p><u>Maintain the quality of BHA-controlled and HCV units</u></p> <ul style="list-style-type: none"> ✓ Set and maintain high health, safety and livability standards for all properties (meets or exceeds UPCS standards) ✓ Implement a comprehensive asset management system ensuring maintenance and capital improvement for BHA properties ✓ Provide specialized property maintenance through Summit Hill CDC <p><u>Ensure the safety and sustainability of BHA-controlled housing</u></p> <ul style="list-style-type: none"> ✓ Partner with police and residents to facilitate information sharing and adequate safety response ✓ Increase safety and security measures in all BHA communities through policies and grant funding when available ✓ Promote sustainability, energy efficiency, and “green practices” at residential and administrative sites
B. <u>DIVERSIFY & EXPAND</u> housing choice and reach of assistance	<p><u>Increase the number and diversity of high-quality affordable housing units</u></p> <ul style="list-style-type: none"> ✓ Build landlord, resident and community relationships to maximize options available to low and extremely low income renters ✓ Improve landlord outreach for recruitment and on-going participation in the voucher program ✓ Leverage MTW designation to provide incentives for landlord participation and to expand housing choice ✓ Expand project-based vouchers and program funding when available from HUD and economically feasibly <p><u>Enhance policy and price access</u></p> <ul style="list-style-type: none"> ✓ Track impact while affirmatively furthering fair housing laws and regulations ✓ Reduce barriers to HCV through review of current policies, then use of MTW to go deeper ✓ Provide specialized property management and implement a smart RAD conversion process to protect residents from dislocation
C. <u>ADVOCATE & LEAD</u> as a catalyst for Bloomington’s housing vision	<p><u>Champion the accessibility, affordability and availability of housing policies for low-income households</u></p> <ul style="list-style-type: none"> ✓ Raise awareness about the BHA, its role in providing affordable housing and its contributions to the community, and provide ongoing communication to better educate leaders and community stakeholders ✓ Encourage participation and expand relationships with local, state and national affordable housing industry groups ✓ Promote housing success, choice and achievement of BHA goals in collaboration with SCIHO and the City of Bloomington ✓ Seek additional state and federal funding

GOAL **IMPROVE HOUSING SUCCESS & COMMUNITY OUTCOMES**

VISION **Bloomington's housing programs are a foundation for residents** *(the people in the home)*

Objective	Strategy
A. <u>IMPROVE HOUSING STABILITY</u> for individuals and families in programs	<p><u>Engender stability among program applicants, BHA residents, and HCV tenants – stability that endures once off assistance</u></p> <ul style="list-style-type: none"> ✓ <i>Strengthen fundamental resident and tenant services that promote successful tenancy (e.g., voucher briefings, move-in orientation, housekeeping workshops, eviction prevention, mediation, financial resource referrals)</i> ✓ <i>Support, promote and collaborate with local partners to develop tenant education resources</i> ✓ <i>Assess existing and emerging needs of residents and tenants and refine or develop services to meet those needs</i> ✓ <i>Encourage those served to be active in giving feedback and problem-solving related to programmatic or policy issues</i> ✓ <i>Collaborate with local government, nonprofits and faith-based institutions to prevent housing disruptions</i> ✓ <i>Develop the BHA's capacity to address unique housing and supportive service needs of particularly vulnerable sub-populations (i.e., veterans, disabled, homeless, elderly, mental illness)</i>
B. <u>BUILD SELF-SUFFICIENCY</u> for individuals and families in programs	<p><u>Implement effective self-sufficiency and resident support programs</u></p> <ul style="list-style-type: none"> ✓ <i>Support new approaches to case management and referral services</i> ✓ <i>Establish and expand meaningful partnerships</i> <p><u>Implement a cohesive approach that creates and supports pathways to economic self-sufficiency</u></p> <ul style="list-style-type: none"> ✓ <i>Motivate participants to define incremental goals, strive to achieve those goals, and lessen dependence on government subsidies</i> ✓ <i>Develop, manage and continually improve programs that promote self-sufficiency through education and employment training</i> ✓ <i>Expand successful economic mobility programs (e.g., build business relationships to create pathways for employment)</i> ✓ <i>Implement MTW to increase self-sufficiency efforts among program participants</i> ✓ <i>Expand mortgage financing options and homeownership-readiness and education activities – strengthening reach of homeownership program</i> <p><u>Enhance the well-being of senior and disabled residents so that they can age-in-place</u></p> <ul style="list-style-type: none"> ✓ <i>Identify needs, expand and strengthen partnerships and connect seniors to organizations serving elderly/disabled</i> <p><u>Support achievement for youth in public housing to increase lifelong well-being</u></p> <ul style="list-style-type: none"> ✓ <i>Develop and promote programs and activities that support education from preschool forward to increase graduation rates, college readiness, and career-readiness for lifelong well-being</i>
C. <u>CHANGE PUBLIC PERCEPTION</u> of our work, community, residents and their value	<p><u>Implement comprehensive advocacy, communication, and innovation strategies</u></p> <ul style="list-style-type: none"> ✓ <i>Articulate and illustrate BHA's role in local housing and self-sufficiency success</i> ✓ <i>Base strategies on quantitative and qualitative outcomes as well as research that housing matters</i> ✓ <i>Foster innovation to encourage new strategies and programs</i>

GOAL **LEAD WITH EXCELLENCE, RESILIENCE & INNOVATION**

VISION Our innovative leadership is respected locally and nationally
BHA is strong, sustainable and in control of its future

Objective	Strategy
A. <u>IMPLEMENT MISSION WITH EXCELLENCE</u>	<p><u>Support BHA's daily focus on values, services, and outcomes</u></p> <ul style="list-style-type: none"> ✓ Maintain High Performer status as designated by the U.S. Department of Housing and Urban Development ✓ Provide excellent customer service ✓ Develop BHA's ability to collect data, analyze trends, evaluate outcomes ✓ Implement MTW plan as a means to improve program effectiveness and efficiency ✓ Use technology advancements strategically <p><u>Invest in staff training and development</u></p> <ul style="list-style-type: none"> ✓ Recruit, develop and recognize high-performing employees ✓ Establish clear accountability and performance standards that are tied to each employee's job role and performance review ✓ Increase hard skills training and program core competencies training at all levels of the BHA ✓ Strive meet diversity, equity and inclusion at an institutional level and in policy and program practice ✓ Proactively plan for and prepare staff for the significant organizational shift of converting public housing to a Housing Choice Voucher (Section-8) funding platform post-RAD conversion
B. <u>BUILD ORGANIZATIONAL RESILIENCE</u>	<p><u>Diversify BHA's revenue streams</u></p> <ul style="list-style-type: none"> ✓ Implement MTW to improve BHA's financial performance and flexibility ✓ Develop new revenue streams through the activities of Summit Hill CDC ✓ Attract capital improvement resources through the RAD conversion process
C. <u>CULTIVATE INNOVATION</u>	<p><u>Create a culture of innovation and entrepreneurship at all levels of BHA and its affiliated entities</u></p> <ul style="list-style-type: none"> ✓ Create an internal culture that supports innovation and strategic risk as we achieve mission ✓ Cultivate commissioners as engaged advocates for BHA values and our strategic direction ✓ Forge creative collaborations with community partners for cohesive service delivery

Appendix: Implementation Timeline

The table below presents initial steps for this plan as a working document that will continue to evolve.

	2018		2019				2020	2021	2022	2023	2024	2025
	Q3	Q4	Q1	Q2	Q3	Q4						2030
Strategic Planning												
<ul style="list-style-type: none">Engage staff, residents and community around planReview progress, revise as needed, report to community	X	X		X			X	continue annually				ongoing
Summit Hill CDC Launch												
<ul style="list-style-type: none">Complete formation and exemption processesFinalize BHA agreements and structuresProvide property management servicesManage RAD conversion – <i>see additional below</i>Develop additional mission strategies	X	X										
		X	X	X	X							
			explore		launch		ongoing					ongoing
					closing		manage multiple phases of renovation					
							build capacity and explore options					ongoing
RAD Conversion												
<ul style="list-style-type: none">Implement comprehensive communication planComplete application / receive determination – <i>due to HUD 9/4</i>Financial planning and partner developmentClosing processImplementation	-----	-----	begin immediately and maintain continuously				-----	-----				
	X	X										
		X	X	X	X							
					X	X						
						X	X	X	X	X	X	
Moving to Work Innovations												
<ul style="list-style-type: none">Develop 10-year MTW planComplete application / receive determination – <i>date yet TBA</i>Develop staff, data and evaluation systems and capacityImplement changes that don't need approvalImplement HUD-approved plan with annual adjustments		X	X	X								
				X	X							
					X	X	X					
			begin as soon as ideas and opportunities emerge									
							begin as approved and capacity in place					ongoing
SCIHO Partnership												
<ul style="list-style-type: none">Continue to collaborate for maximum impact and efficiencyExplore property management relationship	X	X	X	X	X	X	ongoing					ongoing
			X	X	X	X						

Appendix: The Planning Process

This plan developed over the course of six months, during which Commissioners and senior staff thoughtfully explored BHA's current position, community needs, and various options for the future. It began with staff and consultant analysis of BHA information, staff research into relevant HUD programs, and one-on-one conversations between the consultant and key stakeholders.¹ This was followed by a series of Commissioner meetings:

1. Educational Session – This ensured a common understanding of BHA's financial position, HUD priorities, the status of BHA housing stock and the Bloomington affordable housing environment, and provided an overview of relevant local initiatives.
2. Self-Assessment – In this meeting we used the information discussed in Meeting 1 to assess BHA's overall position – its current health as well as opportunities and challenges for the future. Themes from this work guided the remainder of the planning process.
3. Vision for the Future – In the third meeting, Commissioners and senior staff developed a comprehensive vision of success for BHA's impact on the community, its residents, and itself as an organization over the period of the plan.
4. Feasibility Study – Following the vision session, BHA commissioned Advantix Development Corporation to conduct a feasibility assessment to test whether or not the Rental Assistance Demonstration Project (RAD) was appropriate for the BHA. The fourth meeting received its findings and discussed recommendations.
5. Benchmarking – Between the third, fourth and fifth meetings, staff and consultant scanned the public housing authority environment for best practices, innovative ideas, and lessons to learn that were shared with Commissioners and used as discussion guides.
6. Goals and Strategies – Finally, Commissioners and senior staff developed goals and strategies for achieving the vision it had developed.

The plan itself was approved, in concept, by the Commissioners on July 19, 2018.

¹ These conversations included:

Commissioners

- Patrick Murray
- William Hosea
- Kevin Cade
- Sherry Clay
- Marilyn Skirvin
- Lindsey Smith

External Stakeholders

- John Hamilton, Mayor, City of Bloomington
- Doris Sims, HAND Director, City of Bloomington
- Richard Rampley, former BHA Commissioner
- Deborah Myerson, Executive Director, SCIHO

Glossary

Differences among community development designations:

- **Community development corporation (CDC)** – The most general designation, this is a nonprofit, community-based organization focused on revitalizing the area in which it is located, typically low-income, underserved neighborhoods. While commonly celebrated for developing affordable housing, they are usually involved in a range of initiatives critical to community health...
(Source: community-wealth.org/strategies/panel/cdcs/index.html)
- **Community development financial institution (CDFI)** – Private financial institution that is dedicated to delivering responsible, affordable lending to help low-income, low-wealth, and other disadvantaged people and communities join the economic mainstream. If certified, it is eligible for dedicated funding streams.
(Source: ofn.org/what-cdfi)
- **Community housing development organization (CHDO)** – Nonprofit, community-based organization that has staff with the capacity to develop affordable housing for the community it serves. In order to qualify for CHDO designation, the organization must meet certain requirements pertaining to their legal status, organizational structure, and capacity and experience.
(Source: in.gov/myihcdo/chdo.htm)

Affiliate versus instrumentality:

- An *affiliate* is an entity formed by the public housing authority (PHA) under state law in which a PHA has a financial or ownership interest or participates in their governance. The PHA as an institution has some measure of control over the assets, operations, or management of the affiliate. An affiliate is treated like an unrelated third party contractor.
- An *instrumentality* is an entity related to the PHA whose assets, operations, and management are legally and effectively controlled by the PHA, through which PHA functions or policies are implemented using PHA assets. An instrumentality assumes the role of the PHA and is the PHA under the public housing requirements for purposes of implementing public housing development activities and programs.
(Source: PIH Notice- 2017-15 (HA), https://www.hud.gov/sites/documents/DOC_9278.PDF)

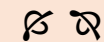
References

Bloomington Revealed: <https://www.bloomingtonrevealed.com/home/>
Rental Assistance Demonstration Program: <https://www.hud.gov/RAD>
Moving to Work: https://www.hud.gov/program_offices/public_indian_housing/programs/ph/mtw
South Central Indiana Housing Opportunities, SCIHO: <https://sciho.org/>
Housing 4 Hoosiers: <https://housing4hoosiers.org/>

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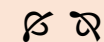
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Your commitment to Bloomington, its residents, and our work in support of all three is clear.

