



**Berkeley Housing Authority**

1947 Center St. 5<sup>th</sup> Floor, Berkeley, CA 94704  
Telephone: (510) 981 5470 Fax: (510) 981 5480

Item 8C

NEW BUSINESS

May 12, 2022

*Office of the Executive Director*

To: Honorable Chair and Members of the Berkeley Housing Authority Board

From: Rachel Gonzales-Levine, Acting Executive Director

Subject: Move To Work (MTW) Update

**Background**

HUD continues to hold MTW onboarding/training webinars about the steps and requirements needed in order to begin implementing our MTW flexibilities, between February and May 2022 which appropriate staff are attending, and Rachel attending them all.

The April and recent May training focused on MTW Supplements—the “why’s and the how’s.” The MTW Supplement is a document MTW designated agencies must submit annually, with the Annual Plan, over the 20-year participation as an MTW agency. The supplement captures reporting requirements, collects information regarding the MTW activities proposed for the PHA to undertake, as well as waivers needed to implement them; through impact and hardship analyses, the Supplement protects clients against undue burden with the flexibilities to be implemented; and, the Supplement outlines the case for endeavoring into the MTW activities, as well as measuring their impact.

Some important takeaways from staff about the MTW Supplement to the Annual Plan:

- Community engagement is critical – build buy in, address issues that may arise, whether intended or unintended consequences.
- The document communicates with all stakeholders, what you are doing and why, over time HUD monitors and evaluates MTW programs – to find out what works well and what eventually will be incorporated into future updates to the programs that HUD operates.
- It must be submitted each year, 75 days prior to FY beginning date (mid-April submission for BHA’s July 1 start of fiscal year).
- MTW agencies are exempt from the requirement to submit the annual PHA Plan – rather, can do that every 5 years. The requirement to submit an MTW Supplement is never waived, however.
- A new MTW PHA may not implement MTW waivers until MTW Supplement to the PHA Plan is approved.

The MTW Supplement is a living breathing document that is updated and amended at least annually, depending on the outcome of the MTW activities—and HUD has suggested that new MTW PHAs do not try to include all of their activities in the first Supplement, but rather plan to time the activities in a manageable manner.

The sections of the Supplement are as follows:


1. PHA Background info
2. Narrative
3. MTW Waiver and Associated MTW Activities
4. Safe Harbor Waivers
5. Agency Specific Waivers
6. Public Housing Operating Grant Reporting
7. MTW Statutory Requirements
8. Public Comments
9. Evaluations
10. MTW Certificate of Compliance.

Below is a screenshot of a sample timeline provided by HUD to give context to the planning requirements that go into an MTW Supplement. This is a large undertaking, necessitating time for staff to plan, collaborate, coordinate, post public notification, once draft is complete, hold hearings (additional hearings if there are requirements to conduct an impact/hardship analysis), receive and analyze comment before finalizing, and submitting.

**Example Timeline for PHA Plan and MTW Supplement Completion**

Action	Jan. 1 FY Start	April 1 FY Start	July 1 FY Start	Oct. 1 FY Start
Begin preparations for developing PHA Plan & MTW Supplement	May	August	November	February
Draft PHA Plan and MTW Supplement for discussion with staff, residents, & community partners	Mid-July	Mid-Oct.	Mid-Jan.	Mid-April
45-day public review period	Mid-Aug.	Mid-Nov.	Mid-Feb.	Mid-May
Public Hearing *	First week of Oct.	First week of Jan.	First week of April	First week of July
PHA Plan & MTW Supplement due **	Mid-Oct.	Mid-Jan.	Mid-April	Mid-July
Update Administrative Plan and Admissions and Continued Occupancy Policy (ACOP)	Upon Approval	Upon Approval	Upon Approval	Upon Approval

\* Required # of hearings depends on Safe Harbor or Agency-Specific Waivers are being requested  
 \*\* Exact due date depends on PHA's fiscal year beginning



MTW Expansion: Landlord Incentives Cohort Onboarding – The MTW Supplement – Tips for Success

### MTW Collaborative Conference

BHA was also invited to participate in a nation-wide group of MTW-designated agencies, called the MTW Collaborative, which held its annual conference during 5 mornings in April (10 am – 2 pm). Attached (Attachment 1) is the agenda for that conference, with lots of helpful information shared by the original 29 MTW agencies, as well as some of the expansion agencies.

This group is comprised of an impressive cadre, and BHA will be reaching out to some of those who have already undergone this planning phase, for support and tips. It was reiterated during this conference, that:

- the MTW Program is a laboratory for PHAs (and HUD) to allow agencies to creatively respond to local community needs by testing innovative strategies
- flexibilities that are successful in responding to the MTW goals of cost effectiveness, housing choice, and self-sufficiency, have an opportunity to be rolled out as flexibilities available to all PHAs eventually.

## Next Steps

As a reminder the 7 steps BHA must take in order to be able to officially become an MTW agency are listed in the screenshot below. The MTW ACC Amendment was approved by HUD on April 27; staff has begun discussions around BHA's current staffing structure, what is needed to move the agency ahead, what we could potentially afford in terms of expansion (or not); and how to tackle the more immediate body of MTW work ahead of us. Staff estimates the MTW planning and ongoing work will take approximately 75% of an FTE. The MTW oversight sits most appropriately with the Management Analyst position or, if the agency had one, a Deputy Director. That said, the workload of the current Acting Management Analyst is at full capacity, and adding the responsibility of MTW would mean other important duties may not be completed and addressed in an efficient manner.

### Steps from Selection to Implementation

- 1 • Complete & Execute the MTW ACC Amendment
- 2 • Prepare your Agency's MTW Finances
- 3 • Conduct Public Process and Complete Development of The MTW Supplement
- 4 • Submit the MTW Supplement to the PHA Plan
- 5 • Transfer PIC 50058 data to IMS/PIC Modernization
- 6 • Coordinate with PD&R and Evaluation Team
- 7 • Receive Approval of MTW Supplement from HUD FO

### **Attachment:**

1. 2022 MTW Collaborative Conference Agenda





## 2022 MTW Virtual Conference Schedule At-A-Glance

### Tuesday, April 19, 2022

1:00pm – 1:20pm ET	Welcome + HAI Group Sponsor Presentation
1:20pm – 2:00pm ET	Annual Membership Meeting – Closed, PHAs Only
2:00pm - 2:30pm ET	Keynote Address: HUD Deputy Secretary Adrienne Todman
2:30pm - 3:30pm ET	HUD MTW Update
3:30pm - 4:30pm ET	HUD General Session

### Wednesday April 20, 2022

1:00pm - 2:00pm ET	CFO Working Group – Closed Session
2:00pm - 3:00pm ET	IMS/PIC Modernization & MTW
3:00pm - 3:15pm ET	Break
3:15pm - 4:15pm ET	Voucher Strategies for MTW Agencies Roundtable Discussion - Closed, PHAs Only
4:15pm - 5:00pm ET	Networking Session – Sponsored by Oakland Housing Authority

### Thursday, April 21, 2022

2:00pm - 3:00pm ET	RAD and Faircloth: 1 Year Later
3:00pm - 3:15pm ET	Break
3:15pm - 4:15pm ET	MTW: The First Two Years

### Tuesday, April 26, 2022

2:00pm - 3:00pm ET	Energy and Sustainability Strategies at MTW Agencies
3:00pm - 3:15pm ET	Break
3:15pm - 4:15pm ET	Equity, Diversity, and Inclusion Strategies to Achieve Systemic Change

### Thursday, April 28, 2022

2:00pm - 3:00pm ET	Key Findings from New MTW Research
3:00pm - 3:15pm ET	Break
3:15pm - 4:15pm ET	Local, Non-Traditional Programs and Opportunities for Development
4:15pm – 4:30pm ET	Closing Remarks – MTW Collaborative Board



# Full Conference Schedule

## Tuesday, April 19<sup>th</sup>

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### Welcome + HAI Group Sponsor Presentation

1:00 pm – 1:20 pm ET

- The MTW Collaborative will welcome attendees and Presenting Sponsor HAI Group will provide remarks.

### Annual General Membership Meeting – Closed Session, PHAs Only

1:20 pm – 2:00 pm ET

*Facilitator: Tracey Scott, MTW Collaborative President*

- The MTW Collaborative Board will hold its Annual General Membership Meeting. This session is closed to PHAs only.

### Keynote Address: HUD Deputy Secretary Adrienne Todman

2:00 pm ET- 2:30 pm ET

- HUD Deputy Secretary Adrienne Todman will provide her keynote address and hold a Q&A session.

### HUD MTW Update

2:30 pm – 3:30 pm ET

*Panelists: Marianne Nazzaro, Program Director, MTW Office; John Concannon, Deputy Director, MTW Office*

- During this panel, the HUD MTW Office will provide updates on the latest MTW news and hold a Q&A session.

### HUD General Session

3:30 pm – 4:30 pm ET

*Panelists: Peggy Bailey, Senior Advisor for Rental Assistance, Office of the Secretary; Joe Carlile, Senior Advisor Budget Policy and Programs, Office of the Secretary; Dominique Blom, General Deputy Assistant Secretary, PIH; Danielle Bastarache, Deputy Assistant Secretary for Public Housing and Voucher Programs, PIH; Robert Mulderig, Deputy Assistant Secretary, Office of Public Housing Investments, PIH; Todd Richardson, General Deputy Assistance Secretary, PD&R*

- During this panel, senior HUD staff will provide updates on the latest HUD news and regulations and hold a Q&A session.

## Wednesday, April 20<sup>th</sup>

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### CFO Working Group - Closed Session

1:00 pm – 2:00 pm ET

- Closed session for MTW Agency CFOs/Finance Directors on topics related to finances and MTW.





## IMS/PIC Modernization and MTW

2:00 pm – 3:00 pm ET

Facilitator: John Concannon, Deputy Director, MTW Office, HUD

Panelists: Stephen Kidd, Management Information Specialist, Office of Capital Improvements, HUD; Wendalyn Hovendick, Management Information Specialist, MTW Office, HUD; John Concannon, Deputy Director, MTW Office, HUD

- The IMS/PIC Modernization session will discuss the status of the development process, the various components of the reporting system, the transition to IMS/PIC Modernization (now known as the Housing Information Portal or “HIP”) for MTW agencies, tenant-level reporting for local, non-traditional households, and the general timeline that agencies can expect for implementation. The session will also include time for Q&A.

## Voucher Strategies for MTW Agencies – Roundtable Discussion – Closed Session, PHAs Only

3:15 pm – 4:15 pm ET

Facilitator: Nicole Barrett, MTW Program Director, MTW Collaborative

Panelists: Maria Razo, Executive Director, Housing Authority of the County of San Bernardino; Brandon Crow, HCV Director, Minneapolis Public Housing Authority

- Join us for an engaging, PHA-only, roundtable where panelists from the Housing Authority of the County of San Bernardino and Minneapolis Public Housing Authority will lead discussion on current voucher challenges and strategies. Topics for discussion will include increasing leasing, regional initiatives, and more. Come prepared to share and participate!

## Virtual Networking Session –Sponsored by Oakland Housing Authority

4:15 pm – 5:00 pm ET

- Join us for a virtual networking session sponsored by the Oakland Housing Authority! The networking session will feature discussion, games, and other surprises!

**Thursday, April 21<sup>st</sup>**

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## RAD and Faircloth: 1 Year Later

2:00 pm – 3:00 pm ET

Facilitator: Tom Davis, Director, Office of Recapitalization, HUD

Panelists: Tom Davis, Director, Office of Recapitalization, HUD; Will Lavy, Director, Program Administration Office, Office of Recapitalization, HUD; Jewell Walton, Deputy Chief, Rental Assistance Demonstration, Chicago Housing Authority

- HUD has streamlined and merged a path for PHAs to develop new public housing units from their available Faircloth Authority and then convert the assistance from public housing to Section 8 through the Rental Assistance Demonstration (RAD) program. The Office of Recapitalization will share updates on new opportunities and data on the Faircloth to RAD process one year after its inception.



## MTW: The First Two Years

3:15 pm – 4:15 pm ET

Facilitator: Andrew Jarocki, Lead for Minnesota Fellow, Housing and Redevelopment Authority of Hibbing, MN

Panelists: Jacqueline Prescott, Executive Director, Hibbing HRA; Diana Ricci, Move to Wellness Coordinator, Hibbing HRA; Andrew Jarocki, Lead for Minnesota Fellow, Hibbing HRA

- The Housing and Redevelopment Authority of Hibbing, Minnesota shares insights from its first two years as an MTW agency. The HRA of Hibbing, a small agency with 252 units of solely Section 9 public housing, has already learned and accomplished a great deal as an Cohort #1 MTW Expansion agency. HRA staff will share insights on lessons learned from getting MTW operations “off the ground”.

## Tuesday, April 26<sup>th</sup>

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### Energy and Sustainability Strategies at MTW Agencies

2:00 pm – 3:00 pm ET

Facilitator: Bobby Coleman, Administrator – Environmental Stewardship & Sustainability Division, Seattle Housing Authority

Panelists: Scott Percival, Sustainability Manager, King County Housing Authority; Tina Miller, Planning and Development, Cambridge Housing Authority; Bobby Coleman, Administrator – Environmental Stewardship & Sustainability Division, Seattle Housing Authority

- HUD has made advancing sustainable communities one of the core priorities in their new strategic plan. Join Cambridge Housing Authority, King County Housing Authority, and Seattle Housing Authority in a panel discussion on the energy benchmarking strategies and sustainability practices they are utilizing to make their communities more resilient.

### Equity, Diversity, and Inclusion Strategies to Achieve Systemic Change

3:15 pm – 4:15 pm ET

Facilitator: Scarleth Lever Ortiz, Senior Director, Office of Equity, Diversity, and Inclusion, King County Housing Authority

Panelists: Preston Prince, Executive Director, Santa Clara County Housing Authority; Ed Hinojosa, Jr., CEO, San Antonio Housing Authority; Rod Brandon, Executive Director, Seattle Housing Authority; Dan Watson, Interim Executive Director, King County Housing Authority

- Has your agency invested in the implementation of Equity, Diversity, and Inclusion principles? Not yet? Join this session to learn how some agencies are resolving problems with EDI investment! Already have an EDI plan? Come to hear new ideas and share yours! This session is for everyone, whether your agency is starting the path toward EDI inclusion or well on the way.



**Thursday, April 28<sup>th</sup>**

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### **Key Findings from New MTW Research**

2:00 pm – 3:00 pm ET

Facilitator: Kelly McElwain, MPP, Senior Research Analyst, Public and Affordable Housing Research Corporation

Panelists: Diane Levy, MCP Principal Research Associate, Urban Institute; Daniel Teles, PhD, Senior Research Associate Urban Institute; Mark Treskon, MUP Senior Research Associate, Urban Institute; Matthew Gerken, MPP, Research Associate, Urban Institute; Alyse Oneto, MPA, Research Associate, Urban Institute

- MTW agencies have adopted over 300 policy innovations with the goal of improving cost effectiveness, resident self-sufficiency, and housing choice. During this session, we will discuss the latest research that examines outcomes of the MTW program at large on these key program goals.

### **Local, Non-Traditional Programs and Opportunities for Development**

3:15 pm – 4:15 pm ET

Facilitator: Nicole Barrett, MTW Program Director, MTW Collaborative

Panelists: Heather Miller, Senior Policy Analyst, Santa Clara County Housing Authority; Jared Cummer, Director of Housing Finance and Asset Management, Seattle Housing Authority

- Join panelists from the Santa Clara County Housing Authority and Seattle Housing Authority in a session focused on opportunities for development through local, non-traditional (LNT) programs, including the incorporation of Project-Based Vouchers (PBVs) into LNT development projects.

