

2015 MTW Conference

February 2-3, 2015

Monday, February 2, 2015

- 8:00** **Registration and Breakfast - Capitol A/B**
- 9:00** **Welcome and Opening Remarks - Capitol A/B**
Welcome:
Richard Gentry, San Diego Housing Commission
Andrew Lofton, Seattle Housing Authority
Eric Johnson, Oakland Housing Authority
Opening Remarks:
Rod Solomon
- 9:45** **Morning Break - Refreshments Provided - Capitol A/B**
- 10:00** **MTW Innovations and Assessment - Capitol A/B**
Introduction: Greg Russ
Presenters:
Ed Malaspina, HAI Group
Larry Buron, Abt Associates
- 11:30** **Break**
- 12:00** **Lunch - Capitol A/B**
Plated lunch will be served
- 12:00** **Keynote Speaker - Capitol A/B**
Introduction: Stephan Norman, King County
Guest Speaker: TBD
- 1:15** **MTW Update - Capitol A/B**
Introduction: Chris Lamberty
Speaker: Dominique Blom and HUD MTW Team
- 2:15** **Break**



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Monday, February 2, 2015 (continued)

2:30

Concurrent Sessions

Please note: Columbia A is located on the Ballroom level

Rent Reform: Term Limits - Congressional B

Jennifer Rainwater, Housing Authority of the County of San Mateo

Sheila Allen Bell, Housing Authority of the City of New Haven

Amy Hiley and Catherine Stone, Alaska Housing Finance Corporation

Single Fund Flexibility/Broader Uses of Funds: Development -

Congressional D

Eric Johnson, Oakland Housing Authority

Katherine Harasz, Housing Authority of the County of Santa Clara

RAD and MTW - Columbia A

Will Lavy, HUD

Greg Russ and/or Sue Cohen, Cambridge Housing Authority

Rishad Mitha, Housing Authority of the County of San Bernardino

Housing Authority of Baltimore City

School Partnerships - Congressional A

Richard Milk, San Antonio Housing Authority

Michael Mirra, Tacoma Housing Authority

2:30

Hill Briefing - Hart Senate Office Building, Room 902

Moderator: Rick Gentry, San Diego Housing Commission

Speakers:

Jill Khadduri, Abt Associates

Michael Buonocore, Home Forward

Fulton Meacham, Charlotte Housing Authority

Karen Dubois-Walton, Housing Authority of New Haven

3:45

Afternoon Break, Refreshments Provided - Capitol A/B

4:00

Concurrent Sessions: PHA and Industry Groups Only

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Monday, February 2, 2015 (continued)

Portfolio Management - Assessment Tool Discussion - Congressional A
Rishad Mitha, Housing Authority of the County of San Bernardino

Metrics - Assessment Tool Discussion - Congressional D
Suket Dayal, San Diego Housing Commission

Statutory Requirements and Demographics: Assessment Tool Discussion - Columbia A
Andria Lazaga, Seattle Housing Authority
Denise Pratt, Keene Housing

Finance: Assessment Tool Discussion - Congressional B
Peter Beyer, Home Forward

5:00 **Adjourn**

5:30 **Reception: Informal Social Gathering - Capitol A/B**
Light refreshments and cash bar


Tuesday, February 3, 2015

8:00 **Breakfast - Capitol A/B**

8:30 - 11:30 **Executive Director's Session - Congressional B**

8:30 **Concurrent Sessions**
Please note that Thornton A/B is located on the 11th floor, Yellowstone is located on the 2nd floor

Rent Reform: HUD Controlled Group Study - Congressional A
Sarah Marie Laster-Abplanalp, Louisville Metro Housing Authority
Kimberely Cole, DC Housing Authority
Richard Milk, San Antonio Housing Authority
Andrea Wilson, Lexington Housing Authority
Dr. Marina Myhre, HUD PD&R
Jim Riccio, MDRC

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Tuesday, February 3, 2015 (continued)

Single Fund Flexibility/Broader Uses of Funds: Services - *Yellowstone*

Jessica Adamo, San Diego Housing Commission

Melissa Sonsalla, Home Forward

Hilaree Prepula, Vancouver Housing Authority

PHA Only for Finance Roundtable Part 1: Cash Management - *Thornton A/B*

Baku Patel, Housing Authority of the County of Santa Clara

Ralph Staley, DC Housing Authority

Greg Russ, Cambridge Housing Authority

Shelly Yapp, Seattle Housing Authority

Peter Beyer, Home Forward

9:45

Morning Break - Refreshments Provided - *Capitol A/B*

10:00

Concurrent Sessions

Rent Simplification Strategies - *Congressional A*

Janine Burrier, Housing Authority of the County of Santa Clara

April Buzby, Keene Housing

Martha Tai, Cambridge Housing Authority

Single Fund Flexibility/Broader Uses of Funds: Programs - *Yellowstone*

Jill Smith, Home Forward

Megan Hyla, King County Housing Authority

Jennifer Rainwater and Cindy Chan, Housing Authority of the Co. of San Mateo

Suket Dayal, San Diego Housing Commission

PHA Only for Finance Roundtable Part 2: Cash Management - *Thornton A/B*

Baku Patel, Housing Authority of the County of Santa Clara

Ralph Staley, DC Housing Authority

Greg Russ, Cambridge Housing Authority

Shelly Yapp, Seattle Housing Authority

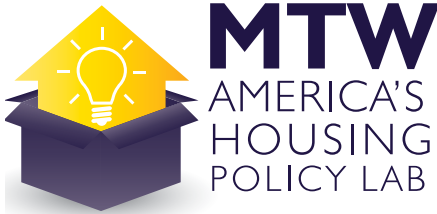
Peter Beyer, Home Forward

11:15

Break

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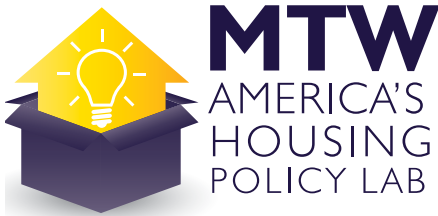


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Tuesday, February 3, 2015 (continued)

- 11:30** **HUD: Deputy Assistance Secretary Session - Capitol A/B**
Introduction: Josh Meehan
- Panel:*
Jemine Bryon, Acting Assistant Secretary, Office of Public and Indian Housing
Dominique Blom, Dep. Assistant Secretary, Office of PH Investments
Danielle Bastarache, Dep. Assistant Secretary, Office of Policy, Programs,
and Legislative Initiatives
Donald J. Lavoy, Dep. Assistant Secretary, Real Estate Assessment Center
Candace Simms, Office of Field Operations
Milan Ozdinec, Dep. Assistant Secretary, Public Housing and Voucher Programs
Jennifer Jones, Chief of Staff, Office of Public and Indian Housing
Alison Smith, Acting MTW Program Director
- 12:30** **Lunch - Capitol A/B**
Plated Lunch Provided
- 1:00** **MTW: What is the State of the Evidence on Self-Sufficiency? - Capitol A/B**
Moderator: Daniel Nackerman
- Panel:*
Dr. Michael D. Webb and Kirsten Frescoln, UNC, Chapel Hill
Dr. Brian Distelberg, Loma Linda University
Dr. Paul E. McNamara, Cathy Strick, and Han Lee, UI, Urbana-Champaign
- 2:15** **Steering Committee Roundtable - Capitol A/B**
- 2:45** **Afternoon Break, Refreshments Provided - Capitol A/B**
- 3:00** **QA Roundtable & HUD-50900 Standard Metrics Discussion - Capitol A/B**
Facilitators:
Katherine Harasz, Housing Authority of the County of Santa Clara
Andria Lazaga, Seattle Housing Authority
- 3:30** **Adjourn**



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Session Descriptions

Day One, 10:00 am: MTW Evaluation and Reporting

HAI Group, with support of CLPHA, NAHRO, and PHADA, is undertaking a study of the MTW program. HAI Group contracted with Abt Associates to conduct the study, which started in 2013 and will run through 2015. The study team recently produced a report titled *Innovations in the Moving to Work Demonstration* which catalogues MTW innovations the Abt Associates study team considers most important in their effect on residents, the agency, and the local community. This descriptive report does not attempt to measure the results of the innovations undertaken by MTW agencies, rather it broadly classifies the innovations across all MTW agencies, discusses their significance, and explains how the agencies make use of the flexibility afforded by MTW, and includes case studies of five MTW agencies that have been particularly far-reaching in their use of MTW authority. The overall goal of the study is to develop a set of agency-wide performance indicators that will permit systematic measurement of the accomplishments of the MTW program. HAI Group will also share the MTW Assessment Tool, developed by MTW agencies, which measures agency's performance and helps showcase MTW successes.

Day One, Concurrent Sessions, 2:30 pm Rent Reform: Term Limits

This session will provide an overview of how three MTW agencies have implemented their own unique varying approach to a term limited program. Approaches range in the length of the term limit, services provided, change in rent calculations, and impact to the Voucher program only or to the Voucher and Public Housing programs.

Single Fund Flexibility/Broader Uses of Funds: Development

This session will provide an overview of how MTW single fund flexibility has been exercised for development at two agencies in the northern region of California. For Oakland Housing Authority, single fund flexibility has played a critical role on a range of housing developments over the last ten years, including three projects currently in the pipeline. The County of Santa Clara has recently re-evaluated the requirements attached to Notice 2011-45 and HUD Form 50900 regarding agency's use of MTW funds for non-traditional development activities. After careful consideration, Santa Clara made a strategic decision in planning the use of these funds so that the administrative burden does not swallow the benefits of this flexible funding source.

RAD and MTW

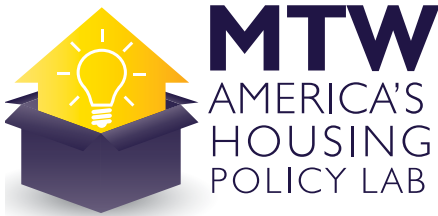
Since the inception of the RAD program, MTW agencies have seen the potential of RAD to address capital needs as HUD has worked to make RAD a more viable resource for the MTW program. This interactive panel will address the purpose of RAD, key aspects of the program relative to MTW agencies, and first hand experiences of MTW agencies who have received RAD approval. In addition, staff from the HUD RAD office will be participating.

School Partnerships

This session will try to answer the following questions: Why should a housing authority be interested in education? What influence can a housing authority have over educational outcomes? How should it seek to exercise that influence? What are the elements of a good partnership between a housing authority and a school district? This session will present examples from Tacoma and San Antonio. In addition, staff from the HUD RAD office will be participating.

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Day One, 4:00 pm: Assessment Tool Discussion

The goal of the assessment tool is to measure agency's performance in order to better tell the MTW story. Staff from various agencies worked for the past two and a half years to develop this instrument which is designed to assess annual performance of MTW agencies in the areas of compliance with the statutory requirements, performance and development of MTW activities, portfolio management, and financial management. The tool also provides the option to include demographic data about the populations served by the agency. The sessions give agencies an opportunity to ask questions about a specific function of the assessment tool.

Day Two, Concurrent Sessions, 8:30 am Rent Reform: HUD Controlled Group Study

The goal of the HUD Rent Reform Demonstration is to assess the effectiveness of an alternative rent policy on increasing employment and earnings in order to achieve self-sufficiency and reducing the administrative complexity/burden of administering the program. The hope is that both goals will be achieved while maintaining cost neutrality or possibly even reducing program costs. The four MTW agencies that are participating in the demonstration, along with HUD and MDRC staff (the organization spearheading the effort on behalf of HUD), will be on hand to discuss program design and implementation progress.

Single Fund Flexibility/Broader Uses of Funds: Services

This session provides an overview of how MTW single fund flexibility and/or broader uses of funds authority has assisted three agencies with delivering supportive services to clients. The San Diego Housing Commission has created the Achievement Academy where HCV and public housing clients focus on increasing work-readiness skills. Home Forward is using the flexibility to enhance staff interactions with participants to improve self-sufficiency. Vancouver Housing Authority's GOALS program uses a structured, holistic approach to maintaining self-sufficiency while enriching client's lives.

Finance Roundtable Part 1: Cash Management

The two Finance sessions will focus on discussing the financial, operational and strategic impact of HUD's updated cash management requirements. The panel will be joined by Stephen Holmquist of Reno & Cavanaugh PLLC and will include a review of how the treasury regulations and HUD PIH notices apply to MTW agencies.

Day Two, Concurrent Sessions, 10:00 am Rent Simplification Strategies

In this session, the three panelists will present MTW activities that simplify the public housing and Section 8 rent calculation process. The Housing Authority of the County of Santa Clara will present an activity that removes all deductions and allowances from the rent calculation process while integrating a flexible monthly tenant rent portion (adjustable between 30% to 35% of a household's monthly income). Keene Housing will discuss its Stepped Subsidy activity that disconnects a household's rent portion from its income and sets it to one of three subsidy tiers which are based on a percentage of the Voucher Payment Standard for the household's unit size. Cambridge Housing Authority will be discussing its Public Housing rent simplification activity which implements several rent reform components to its public housing program, including setting rents based on \$2,500 income bands and simplifying Medical and Childcare deductions.

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Single Fund Flexibility/Broader Uses of Funds: Programs

An in-depth look at the different approaches MTW agencies have taken to address the challenges of homelessness in four different communities, including the following: 1) A rapid-rehousing in partnership with a school district model in King County, 2) A 30 million dollar multi-faceted, multi-partner, multi-year action plan in San Diego, 3) A Provider-based program in San Mateo designed to reach traditionally under-served populations in the Section 8 program (ie: Survivors of domestic violence, recent parolees), and 4) Program Based Assistance Partnerships (including Short Term Rent Assistance) in Portland. Join us to learn more about how these models are making a positive difference in the community.

Finance Roundtable Part 2: Cash Management

The two Finance sessions will focus on discussing the financial, operational and strategic impact of HUD's updated cash management requirements. The panel will be joined by Stephen Holmquist of Reno & Cavanaugh PLLC and will include a review of how the treasury regulations and HUD PIH notices apply to MTW agencies.

Day Two at 1:00 pm, MTW: What is the State of the Evidence on Self-Sufficiency?

With MTW agencies implementing rent reforms, work requirements, and term limits, what is the empirical evidence that Moving to Work works? This session presents findings from academic evaluators of the Charlotte Housing Authority, the Housing Authority of the County of San Bernardino, and the Housing Authority of Champaign County. Presenters will address implementation of work requirement and Minimum Earned Income policies nationwide and provide findings from two longitudinal studies on the effects of term limits and work requirements on housing participants' self-sufficiency.

Day Two at 3:00 pm, QA Roundtable & HUD-50900 Standard Metrics Discussion

In this question and answer session, conference participants are provided an opportunity to ask additional questions from panelists and speakers. Further, a discussion regarding the HUD-50900 will allow participants to pose questions to colleagues, discuss experience with the metrics sections, or any other content relevant to the standard metrics discussion.

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