

**HUD Moving To Work Expansion Training**

**Asset Building Cohort Onboarding**

**Thursday, October 13, 2022**

John Panetti: Hello, everyone. Welcome to the HUD Moving To Work Expansion Asset Building Cohort Onboarding.

Welcome to MTW. My name is John Panetti from ICF. And I will be your host today. Before we get started, I'd like to go ahead and review a few logistics with you. So all attendees are muted upon entry. You can mute and unmute yourself throughout this webinar. At the bottom of your screen, you'll see a Webex toolbar.

All the way to the left, is the mute and unmute button. If it's red, it means you are muted, and we can't hear you. If it's green, it means that you are unmuted, and we can hear you. Please remain muted throughout the session unless you'll like to ask a question or provide input. And to do that again, just click the microphone button to unmute yourself, ask a question, or provide your feedback. And then please mute yourself when you are done speaking.

And then also, if you have any questions, you can also provide those in the chat box. So please, if you are asking question in the chat box, please remember to type your question to everyone, so on that dropdown in the chat box. And if you don't see the chat box, it's in the bottom right-hand corner of your screen. Just make sure that dropdown is going to everyone so we can see your question or comment. And again, you are also welcome to ask your question verbally.

Just remember to please mute yourself when you are done speaking. And then lastly, I'd like to let you know that the session is being recorded. And so with that, I'll go ahead and turns things over to Janet.

Janet Pershing: Hi, everybody. And welcome to this first webinar in the MTW Expansion Asset Building Cohort. The whole MTW team is delighted to have everyone here and to help you with this kickoff and welcome you to the MTW family. My name is Janet Pershing. I am with ICF. We are a contractor that supports the MTW team's work at HUD. Marianne Nazzaro you leads that team, had intended to be here with you today.

Unfortunately, she had a personal emergency and can't be. So I'm stepping in to help facilitate the session. But you'll be hearing from lots of members of the MTW team over the course of today. Let me take a minute to just congratulate you on being selected as one of the agencies that is going to participate in this asset building cohort.

The team is excited about the programs that you're going to be implementing and working with you along your MTW journey and really just grateful to have you as partners and to be able to test new policies and really think about how we can produce research that is going to be informing the rest of the country over time about the things that you are learning, the things that you are doing.

Our goal here in this webinar series is to get you the information that you need to get started. So today in this introductory webinar, we're going to begin by introducing some of our HUD staff. You'll hear from some folks today that you'll be hearing about over the course of the webinar

series and just give you a chance to meet these folks. Then we'll take a break to move into small groups so that you can get to know some of your fellow agencies.

And they're also some HUD field office staff who are here and will be participating with you in those small groups. In that session, we're going to talk a little bit about why you wanted to become an MTW agency and what you're hoping to accomplish. So it'll be a little chance to get to know each other there. We're then going to come back and review the seven steps that you're going to need to complete as you begin to implement your MTW program.

We'll get into detail on the MTW ACC amendment execution process. That's because that's the first step that you really need to understand right up front. We're then going to go through the remaining steps. I can promise you, it is a lot of information. But we will be trying to give you the overview. So you'll have a sense of what's coming. And we will get into more detail on each of those elements in subsequent webinars.

And then finally, we'll have a chance to ask questions and wrap up at the end. But we'll be inviting you to ask questions along the way. So what I'd like to do now is just take a minute to introduce the HUD staff who will be presenting on the call, going to ask each of them to just come on camera for a minute so you can see a face, put a face to a name, and just say a few words about their role. And then we will move right into our next step. So Chris Golden.

Chris Golden: Hello, everybody. Chris Golden here. I am one of the housing innovation specialist on the MTW team. I focus primarily on policy issues with some of our more tenured MTW agencies. But I did have quite a bit to do with these asset building cohort as well. So I'm excited to see where that goes. And you'll see me again in that context.

Janet Pershing: Thanks, Chris. Jenny.

Jenny Rainwater: Hey, everybody. I'm Jenny Rainwater. I'm glad to be here today. I'm really glad you are here as well. I'm a housing innovation specialist in the headquarters office and working with a lot of agencies both some of the initial agencies, the 39, and with many of the new folks like yourselves as you're starting out and getting going. So look forward to working together. Thanks, Janet.

Janet Pershing: Thanks, Jen. Phillip.

Phillip Pless: Okay. Good afternoon, everyone. We're so excited that you're all here. This has been a long time in the making. So congratulations, each and every one of you. So my name is Phillip Pless. And I work on financial issues in the office. So you will hear from me today. But then you will see a lot of me in the upcoming months. We have a webinar scheduled on the topic of finances in both November and January.

So we're very excited to have you all on board. And you'll be hearing a lot from me in the upcoming weeks to come. So I'm going to pass it back to Janet.

Janet Pershing: Thanks, Phillip. Wendalyn.

Wendalyn Hovendick: Thanks, Jan. I'm Wendalyn Hovendick. I'm a management information specialist which basically just means the geek of the MTW office. And I'll be talking to you today just briefly about the 50058 MTW Expansion form that you'll be getting familiar with as we go on further in this webinar series. And you'll probably be hearing from me over the course of the next few months or so about the housing information portal or HIP system.

Janet Pershing: Thanks, Wendalyn. Elizabeth. And Elizabeth, if you're speaking, you're on mute.

Elizabeth Rudd: Hello. I'm Elizabeth Rudd. I'm a social science analyst in the office of policy development and research. And I've worked a lot on evaluations of MTW projects. And that's why I'm here today. And that's what I'll be talking about a little bit later. And I'll be talking with Bethany Boland, who's the representative here today from our evaluation research contract.

Janet Pershing: And Bethany, would you like to come on camera and just let people see your face and put a face to a name?

Bethany Boland: Hi. I'm Bethany. Good to be with you.

Janet Pershing: Thank you. And then we will be meeting various field office staff in your small groups. So with that, want to take a minute to just share with you some of the excitement that this group has about MTW and this journey that you are about to enter into. It's a wonderful program with huge things to offer. I think you all know that or you probably wouldn't have signed up.

But we wanted to take a minute to look at a little video that shows you what some of your colleagues from other MTW agencies that have gone before have to say about the benefits. So we're going to go ahead and mute everybody to make sure there's no audio feedback during this time. After the video, you will again be able to mute and unmute yourself. So take it away on the video.

Karen Kreutzberg: Oh, MTW is amazing. It is the best thing since slice bread, seriously. It is the thing that gets me up in the morning. It is the thing that gets me to work. I am so passionate about it. It is absolutely truly amazing. We are creative. We get to think outside the box. We get to respond to local community needs, what our people need, not what HUD or people in Washington think people in Boulder, Colorado need.

We got to respond and work with our local partners. We get to create what our residents and participants need. We talk to them. We hear from them. We get what they need and can really help them move forward. That in and of itself is amazing.

Karen Dubois-Walton: It has been absolutely life-changing in terms of our organization and what we were able to do and what we've been able to do as an MTW. And when I look around at my colleagues, even just up the road in other cities right within Connecticut, I can really see the difference that the MTW flexibility has provided.

We went into this with a plan to really redevelop our portfolio and to really invest in our residents and then figure out ways that we could streamline our activities. And there are so many examples of how we can see that has changed in dramatic ways for our residents, for our city, the impact in our city. And also spirit up for our employees.

It's brought a real innovation spirit or entrepreneurial spirit to the work we do, which makes us feel not like a big public bureaucracy but more like an innovation lab as Moving to Work likes to call the program.

Suket Dayal: MTW is a true gift. It is the flexibility the Housing Authorities need, if I could go as far to say, to survive going forward. It allows you to address local issues. It allows you to customize a program that works for you, your families, and your community.

Janet Pershing: All right. So just a little taste of how much excitement there is about the program from others who have had some, in some cases, many years to actually dig into the program and see the benefit. So I'm hoping that you all will be the ones who are the subject of those kinds of very excited interviews in a few years. So let me just give you a quick look at who all of you are. You may have had a look at this already in other places.

But this is the asset building cohort, 18 of you. Let me take a look at who your fellow PHAs are. I do want to just hope, in particular, that our Florida colleagues who were in the wake of hurricane Ian are doing okay. And don't know if we have representatives from all of those agencies here today or not. Hopefully, everybody's doing well and there will be. But if not, we'll catch them up later.

So what we're going to do now is to break into some groups to be able to talk with your colleagues. And if we look at the next slide, you can see which group you're going to be in. These groups are largely regionally broken so that you'll be able to talk to people who are nearer neighbors and the field offices that will be engaging with you in your geographic area.

I think that these are folks who are going to be able to be partners for you, thought partners, and thinking about asset building, but also in just getting through the various processes to become formal MTW agency, to get your supplements signed, having people to talk it through with and to walk hand-in-hand with is really super helpful. So you can see here how the groups are divided. Take a little note about which color group you are supposed to be in.

Jenny is going to be facilitating the red group. Elizabeth will facilitate the yellow group. Eva Fontheim [ph] will facilitate the green group. And Phillip Pless will facilitate the blue group. So when you get into groups, please make sure that you turn on your cameras if you are in a place where you can do that. It's super important that you be able to get to know each other. And faces really help with that.

So I really urge you to take that step when you get into that room if you possibly can. In terms of the logistics of how this is going to work, in a few minutes, I'm going to ask John to move everybody into their breakout rooms. If I could see the next slider please. You will see at the

bottom of the screen, when you get into this group, there's a little red -- looks like a door space on the far right.

If you end up in the wrong color group for any reason, you can use that door to exit. You'll come back into the main room. Let John know which color group you should be in, and he can get you placed properly. In order to do that, once you press that red door button, there's a second step. You have to confirm that you actually do want to leave the session. And so make sure that you do both of those steps to get back to the main room if you need to do that.

If you joined us today and we didn't have your information in advance, you may be left in the main room when people move out to the breakout rooms. That's fine. You can let John know where you need to be, and he will get you moved in there as quickly as possible. Mark, if you go back one more time to the prior slide so people will take one more look at which color room you're supposed to be in.

That'll just help you make sure you know if you're in the right or the wrong place. So when John sends you into the breakout session, you will have a quick pause while he clicks the go button. You, then, have to proactively click a button to say, "Yes, I want to enter that session." So just make sure you're looking for that button. And then you will come into the session. On Slide 11's layout, we have the actual content of the breakout sessions.

We're going to just ask and answer three quick questions. Why did you want to become an MTW agency? What are you hoping to accomplish? And which asset building approach are you going to be tackling. So we'll have about 20 minutes in these sessions. Your facilitators will just help move us through the conversation.

In order to answer these questions for each of the agencies, the facilitators will ask for one person from each agency to be the spokesperson to be able to summarize for the rest of the group what the reasons are that you have joined into MTW. All right. So with that, any questions before we break into those sessions? The facilitators can, of course, answer questions? Okay. Seeing none, I'm going to ask John to ahead in just a moment, and send us into those groups.

Remember to click the little join button when the popup window comes up. And we will see you back here in about 20 minutes. All right. Welcome back, everybody. Give everybody a minute to make sure we're in the correct room here and everybody has come back to us. But glad you all had a chance to meet some of your colleagues who are going to be walking along the same road with you, at least, in the conversation that I joined, there was a lot of overlap.

I think there were also some different ideas from different folks that people would probably pricking their ears up about. So hopefully, you got some good ideas from others. And we'll continue to do that over time. So we're going to move now to thinking about what the steps are in moving into the MTW process. And we're going to summarize this as seven key steps. I want to give you a fast overview now. And then we're going to dig into each of these.

And we'll have leaders from the HUD team going through these with you. So the first thing that we're going to focus on today, and we're going to focus on it in some detail, is completing and

executing the MTW ACC amendment. We know that that's really the kickoff, the start of things. And Chris is going to walk us through that in some detail. We're then going to talk briefly about setting up PHA finances.

As Phillip mentioned in his introduction, you're going to hear a lot about finances. This is a big issue for people to think through, work through, understand what you need to do locally to make this work. We'll have one webinar on that before the December holidays and another one after. So today, Phillip will just give you a taste of what we're going to be covering. Listed here as step three is the public process and development of the MTW Supplement.

In our discussion group, a number of people did talk about the public process, the fact that this application came pretty fast, and maybe there hasn't been a ton of opportunity yet to conduct the public process. People were also recognizing the importance of doing that now that we actually have MTW agencies making sure that we're communicating really clearly with the residents with our other stakeholders in the community. So we'll talk briefly about that.

Submitting the MTW Supplement, they're actually going to be two separate webinars on that. Again, in 2023, we'll be getting to those. So this will be an overview of what comes with that. And then talking about the approval process so that you understand once you get that submitted, what happens in order to get that approved through the field office. Once that's all done, we're going to be talking about the 50058 and the shift to HIP.

Wendalyn will talk for just a moment about what you're going to be learning about that, again, down the road even after those supplement webinars. And then we have listed as step seven, setting up the research coordinating with PD&R training your staff to participate.

Although it's listed as step seven and, in some sense, you can't start research on the activity until you start the activity, which is at the end of the process, as you saw, Elizabeth and Bethany are on this call, you're going to be talking to -- working with the PD&R team throughout this process. Although, actually, starting the research comes after you start the activity, getting ready for it is going to be something you'll start early on.

So we'll be hearing from Elizabeth briefly on that step seven. So that's what we're going to go through. Again, it's a lot of information. It'll be pretty high level except for step one. And so, I want to turn it over to Chris right now to talk us through the MTW ACC Amendment.

Chris Golden: All right, then. Can everybody hear me okay? My mic looks like it's working.

Janet Pershing: Yep, you're good.

Chris Golden: Great. Okay. So the ACC Amendment, also known as the annual contributions contract, is something that you sign generally both for the public housing and the voucher side, this is an amendment to the broader ACC. Its goal is to set the terms of participation and the details, the requirements and covenants that you have to follow pointing to things like the selection of some of the operations. So this is the first document that you'll be signing.

And it'll be executed, both by your housing authority and HUD. This needs to happen before you can start using the fundability, the ability to move your funds flexibly and, of course, before you can do anything like supplement as well. So because it's sort of step one and it is thankfully a relatively short document, we will walk through each of the sessions real quick. And then I can pause at the end and take any questions. Next slide, please.

So the first couple sections are essentially the general legalese. It's not that different than how it would look in other potential ACC Amendments, just with some add MTW-ness to it. So Section 1 just states that this is an agreement between HUD and the PHA. Section 2 talks about how this amendment applies to both your public housing and voucher programs, if applicable.

Section 3 is about how the amendment is connected to both the law which is on the 2016 Appropriations Statute as well as the operations notice, which has much more of the details for how the program works. And then Section 4 is what guarantees the 20-year term of MTW with where it begins in the first full fiscal year following the execution of this amendment. Next slide. So Section 5 is about the requirements and covenants.

This, again, points to the importance of sort of the operations of this as the general governing document. It is also where you ascent to cooperation with HUD and our contractors for the evaluation. So it references the selection of this as well and talks about how the Moving To Work program only allows for various waivers and exemptions with things covered under the Housing Act of 1937. We can go beyond that. Section 6 is about the transition plan.

So MTW has existed since the 90s. But it is technically a demonstration. It technically can end. I wouldn't necessarily put on it. But it is important that this exist just in case. And so the transition plan is basically about how in your 19th year, you would submit a document describing any activities you might want to continue doing afterwards and our obligation to respond to that. Next slide. All right. So terminations and defaults.

These are the sanctions that could happen if issues arise between the housing authority and HUD. They can go from something relatively minor like additional reporting, medium response, which might be, say, suspending an activity that is causing concern or, of course, the final measure, which would be ending your participation in MTW. We haven't really had to do this much at all and certainly not the big thing at all. But, again, this has to be somewhere. Next slide.

So this is the Future Laws Amendment. So this states how if there are any future laws that conflict with any provision of the ACC, they still work. And any invalid clause or portion of the ACC that is nullified by future law is stricken from the ACC without requiring us to get you to sign the whole thing all over again. With existing agencies, this can get more complicated sometimes. Laws may or may not remember to mention our involvement or noninvolvement.

So this is way of just sort of making that a lot cleaner and standardized. And that, I believe, is my last slide.

Janet Pershing: I believe that's right, Chris.



Chris Golden: Looking for any questions if we have them.

Janet Pershing: And you really have two mechanisms for asking questions. One is you have the power of the unmute button down at the bottom of your screen, welcome to come off mute and just ask a question if you have any about this. You also have the chat feature, the little speech bubble at the lower right will open the chat window. Make sure you're sending the chat to everyone. Otherwise, we won't all see it.

We are going to be going through the process in a minute. Jenny's going to walk us through that, but if you have any questions about the agreement itself, this is your chance to ask.

Mitzy Rowe: This is Mitzy. Usually, the ones that I know of, annual contribution contracts, talk about funding. Is this mention funding at all or no?

Chris Golden: No. The ACC Amendment is not specific to funding. Your funding shouldn't be different than it is sort of under -- the way that you receive your funding from HUD is not meant to change much. Your ability to move funds around once you receive them is something that you can do in MTW. And it's unique to MTW. And some of the ways that you -- what is an eligible expense is a bit broader.

If you use voucher funds to shore up a public housing account, you would still be renewed for those funds. But that is covered in the operations services, those more nitty-gritty details.

Mitzy Rowe: Okay. Thank you.

Janet Pershing: Thanks, Mitzy. Anyone else?

Tanya Van Order: This is Tanya from Madison, New Jersey. Phillip, I'm just curious -- you know, I read this all over and on -- in many places, it says, "Okay. You're going to sign this or take this option. But you're still -- and only then are you an MTW." But when I reviewed all the steps, that seemed to come up quite a lot. So first, we do the new ACC. And now, are we officially an MTW, not really? We're going to need to do an amended action plan?

So when are you really an MTW? Is it at the very end of all those steps or is it a phase-in?

Phillip Pless: I suppose a phase-in would be appropriate. So once you sign the amendment, you are officially an MTW in the sense that you can use your funds flexibly. You could take voucher funding and use it on the public housing side to, say, increase the size of the capital project or to help with some operating shortfalls or something like that.

Once you have done an MTW Supplement is when you can start implementing policies because you have to propose the policies. Your community has to have a chance to respond to said policies. And then depending on whether or not they operate in any way outside of the operation so does HUD has to review them as well. So those are probably the two bigger steps. There's probably a couple of their breadcrumbs along the way. But the amendment is the first step.

And I think after you sign the amendment, then we can call you MTW. You can start doing some of what it mean to be MTW. And your supplement can happen as soon as you like. You can submit one out of cycle or you can just wait for your next plan cycle. Either is fine.

Tanya Van Order: That was really helpful, Phillip. Thank you very much.

Jenny Rainwater: Chris, can I just jump in with one thing? When you sign and submit your ACC to HUD, it has to be fully executed. So it needs to be countersigned also by HUD. And that will be sent back to you. And there will be some information in that we are sending them back via email. But your agency will receive information that you will have access to and funding flexibility beginning the first of the following month.

So if you get submitted this October, it gets countersigned by HUD, you would have access to that funding flexibility beginning in November. So just keep in mind, it needs to get -- that counter signature is the piece. That's all.

Phillip Pless: Yeah. And this is Phillip.

Tanya Van Order: Thanks.

Phillip Pless: And I would just add in, just to piggyback off of what Chris was saying, we'll be covering a lot more about how the ACC Amendment execution process affects your finances in just a few minutes and a lot more detail in November. So just stay tuned on that because it gets a little bit more nuanced when it comes to financial matters. So just wanted to add that thought on.

Janet Pershing: Thanks, Phillip. I think that's one of the key takeaways here is you're going to be getting a lot of information. You'll have some more questions. And there will be other opportunities in good order to be asking those. Jessica is asking who at HUD will sign the ACC as a PFO? Chris, you want to take that? Oh. Somebody else got it. That's fine.

Jenny Rainwater: Chris absolutely can. But it actually it is counter signed by the General Deputy Assistant Secretary at HUD. And that person is at the HUD headquarters in Washington DC.

Janet Pershing: Thanks, Jenny.

Chris Golden: Yeah. It'd been Dominique Bloom in the absence of a assistant secretary in the Department of Public Community and Housing. She would sign the document.

Janet Pershing: With that, let me suggest we move onto our next segment because this is actually going to talk through in order of some of the pieces that people are, I think, wondering about. Now, Jenny, you want to take it away?

Jenny Rainwater: Sure, absolutely. I think I'm just going to back us up a little bit, just thinking about this slide in front of us right now with the first box on the top-left line is the broad reviews. And the piece to think about -- I think it's a really good idea to really include your board because

they're going to need to approve, frankly, finalizing signing and submitting that signed Moving To Work ACC Amendment to HUD. So it's good to have them involved in this process.

And actually, one of the pieces of that is we'll be asking not only are you sending that ACC Amendment, but you're also sending the board resolution. So you need to be having those conversations and really having that involvement. The other piece to think about with the signature is that it needs to be what's call a wet signature. So it can't be a digital e-signature. So you can sign it and submit it to HUD. You can scan it and send it to HUD.

HUD will then countersign it. And we will send it back to you. So just keep that in mind. Your signature or the person, either the board chair or potentially the board will say, "No, we want the executive director to do so." And we'll direct the executive director to do that. And that's fine. That's part of the reason that we're asking for the board resolution is who signing the document. Who has the authority to do so.

But when they do sign it, it needs to be a hand signature, a wet signature. So when that comes to the office, it gets submitted via the email. So you submit that to the MTW Asset cohort. So that's the email that we've been sending information to you from. You will submit that document to us. And our office we'll work to get that countersigned by HUD as quickly as possible and back to you.

And that execution date when HUD countersigns it will be the PHA's official entry date into the MTW demonstration program. I know that came up before. But just again, that date that that ACC Amendment is signed by the PHA and then countersigned by HUD, that is when it is fully executed. Are there any questions about that particular piece? Does that help answer some of the -- how does this work? Okay. Can we go forward to the next slide? So --

Tom Graham: I'm sorry. I have one quick question. In the sample timeline, HUD has the earliest that the ECC could be executed as of November. Is there flexibility with that? If we were to do it before the end of October, is that, in any way, an issue?

Jenny Rainwater: No. You can absolutely submit it. You can sign it and submit it. And if we can also get HUD to sign it within this timeframe -- so we're hitting the middle of the month. So we got two weeks, essentially, to get it through that processing, get HUD to countersign it. Then it would be effective the first of the following month. You'd have the funding flexibility then. And Phillip's going to talk some more about that.

So I don't want to talk about the financial pieces. But --

Tom Graham: It's more about the timing of that initial ACC, if there were some prohibition of us executing it in October.

Jenny Rainwater: There is no prohibition. The biggest thing is we want to make sure that you've had a conversation with your board, and they have given direction. They approve, and they've given direction to go ahead with scope -- please go ahead -- and either the secretary of your

board, your chairperson -- or potentially, they will say to you, the executive director, please sign and submit this to HUD. So there will --

Tom Graham: And is there a required timeline from the date that we sign it that is then submitted to HUD?

Jenny Rainwater: No, there is not an explicit defined timeline for that. But I wouldn't sit on it either, if it possible.

Tom Graham: Thank you.

Jenny Rainwater: So with the ACC Amendment, this is the final page that everybody will be signing. And we just thought it was helpful because, frankly, we've had lots of things come in. But just to delineate that it is, that top line under PHA is the signature of the person who is signing officially for the PHA. Then the next line is literally, their name printed. Not everybody has great penmanship. I will say I'm included in that.

It's good to have a printed version below that. It's, what does that person title and then what the date. And then you can go ahead and send it in, again, to the MTW Asset Building email. Any questions on that. I think it's pretty straightforward. But we want it to make sure that that's there. Can we move to the next slide? So this was another question that we received. So we prepared a sample board resolution.

So this sample, I think, was emailed to you already and the materials that Marianne Nazzaro [ph] had sent out when she welcomed everyone. But if not, we can do that, make sure that you have it. It is a draft. You can use it or you cannot. You might have your own. It's not required language. It's literally an example for your use. But you want those pieces.

So you want to make sure your board is saying, "Yes, we approve of this and this is, potentially, the person we want authorizing to sign" if they are choosing that the chairman is not going to do that. So that will be there. We can make it available. If you can reach out, you can send an email into that email box. We'll get you the copy. Are there any questions about that in particular? Let's see. I'm trying to see.

Janet Pershing: The link's in the helpful resources. We're not live. Can we get that document with live links? So I think we can definitely make sure that we get good links for anything that was not working. So we can commit to checking on that for sure. Thanks, Tanya. Thank you very much, Jenny. Thanks. So we are now going to take a ten-minute break.

We know that when the information is coming fast and furious, you just need a little chance to close your eyes for a minute, take a stretch. So John is going to put us on pause here. I now see 12:28. So we'll come back -- oh, that's because I'm on the west coast. That would be 3:28 per eastcoasters. So at 3:38, we will get started again and work through the other steps that will come after you're done with the ACC Amendment.

So please take ten minutes to stretch, get a drink of water. And we will see you back here soon.

Phillip Pless: Welcome back, everyone. I hope that you were able to step away from your computer for a couple of minutes. I know this is a long training and we have the breaks filled in. So I think we're going to continue on with our chronological process. So yep. There we go. Your next step in the process is going to be to prepare your MTW agency's financial operations.

So one of the points that was made earlier in this presentation by both Chris and Jenny was regarding the ACC Amendment Execution process and how that affects when you become an MTW agency. So as you recall, you guys become an agency on the day that Dominique countersigns the ACC Amendment. So now, we're going to talk a little about funding flexibility very shortly here.

So funding flexibility refers to your ability to use your three main sources of funds that you get operating capital and HCV and that includes HAF and admin fees flexibly. So as the example Chris gave, using your HCV funds for a public housing operations or public housing [inaudible] expense. So that is available to you the first day of the month following the ACC execution process.

And just to layout a critical example, let's say you submitted your ACC Amendment to HUD today, October 13. Dominique was able to countersign on October 27. The first day you would become an MTW agency is November 1 because that is the first day of the month following the full ACC Execution Amendment process, i.e. -- countersign, I meant -- I'm sorry, the ACC Amendment countersigning by Dominique. So that's just something to keep in mind.

So this next bullet point here is just -- we have a lot of great resources that are available to you all regarding how funding is going to be calculated. So this first link here is actually a link to a webinar that occurred in October of 2020 where we went into a lot of detail about, in particular, the HAF renewal formula and how that is calculated for expansion PHAs because it's a little bit different than for non-MTW PHAs.

So I would highly encourage you to review that prior to the January webinar. The next link is to Section 5 of the MTW Operations Notice which actually also goes into a lot of detail and also has a couple of examples about HAF funds are calculated.

And then finally, we have the MTW online manual, which is a really great resource that I'm sure will be referenced in the resources slide later on, that really just kind of goes into a lot of detail, again, with more examples about how the HCV funding formula works, especially the housing assistance payment portion of that formula.

So another couple of really important things to keep in mind here as you're starting to prepare your journey as an MTW agency is to think about potential changes to financial policies and procedures. We will have a great series of speakers who will go into a lot of details about things that they experienced when they were an Initial-39 agency. And they will be available as a resource and acts in an ask-the-expert portion of our webinar.

So that will be a great resource for you all. Just two last things before we transition. The first point is that please keep in mind that two CFR part 200 which is all of the uniform administrative

requirements including everything that comes in regarding single audit act requirements and things of that nature, cost allocation. Those are still applicable to MTW PHAs. So please just start -- keep that in mind.

And then finally, we will go in a lot of detail on the November 16 webinar. But we're really going to talk about how the ACC Amendment Execution process will impact your reporting in different HUD systems. So things like VMS, the Voucher Management System, the ethics system, financial data schedule, and other related topics. So that's the end of this slide. So let's see if there are any questions that have come in. So I'm seeing that the first question.

MHA received a welcome letter. But I'm not aware of a packet. Was there a welcome packet? I see that Wendalyn has responded to that question in the chat. So take a look at her question. She basically said that Marianne sent out a email. And that included some helpful resources, a sample timeline of becoming an expansion to agency, the blank ACC, and a sample board resolution. So please take a look at that.

And that's what we were referencing in the helpful resources. The next question is can we be sent these links. And so, actually, in the PowerPoint presentation, you will see these are actually hyperlinked. So you'll be able to click on those and go to these resources that we're talking about. But also at the very end of the webinar, there will be key resources. Those will also be clickable hyperlinks that will direct you to the appropriate resource.

So yes, those will definitely be available to you. And then were there any other questions, if there's any other questions that came in, regarding financial matters? Not seeing any. If you can - you're also welcome to come off mute if you would like, ask your question.

Mitzy Rowe: I have a question. This is Mitzy. Do you have to have policies and procedures approved by the board before you start actually -- let's say you get your ACC approved, do policy have to be approved prior to having the flexibility with funding?

Phillip Pless: So what polices and procedure are you referring to specifically? Are you referring to financial policies and procedures or overall agency policies and procedures?

Mitzy Rowe: Financial.

Phillip Pless: So I would say the answer to that is no because from our experience, especially what we have seen in a lot with the first cohort that we announced last January, is that this is the adage. This is the tortoise and the hare. This is more of a tortoise situation than it is a hare situation.

And what I mean by that is just that we know that this process of -- just from becoming a MTW agency to be able to fully get everything onboard, is going to take you some time to develop. So that's why you'll see that's why we have the part two webinar talking about financial policies and procedures in January because we're trying to get you the information that you really need to know as soon as we possibly can.

So to answer your question, no, they don't have to be completely in place prior to the ACC Amendment execution process.

Mitzy Rowe: Okay. Thank you.

Phillip Pless: You're welcome. Any other questions before we move on to the next section of the webinar? You can either type them in the chat or you can come off mute. Not hearing any, I am going to pass the baton, I believe, to Jenny, who is going to talk about the onboard process and the development of the MTW Supplement.

Jenny Rainwater: Thanks, Phillip. With this -- let me go through this slide, and then -- yes, that's good. So with your conducting of a public process and the development of the Moving To Work supplement, I think the biggest thing to keep always in mind is that it's really -- you can never overcommunicate, frankly. You communicate and communicate and communicate with your staff and your community.

And someone will always have a question and say they never heard something. So just know that you want to be in constant communication and that includes, as you're putting together your supplement, that that document is designed to be another communication tool for everyone. As this live says, it informs HUD. It informs your residents, your tenants, and your general community about what Moving To Work activities you're planning to implement.

And depending on what waivers you're asking to implement through that supplement process or if it's not already a waiver that is in the Moving To Work Operations Notice, and you want to implement something else beyond what is there and you're putting in what's called an agency-specific waiver, that process will include the need to hold actually two required public meetings or public hearings. So again, if you -- you should review that operations notice.

And I will say I did kill yet another tree and printed that out. You can find a link if you're wanting to see that Moving To Work Operations Notice. And I would encourage you to do so. It is on the Moving To Work Expansion webpage. And it is basically Section 6 that you can look at that section specifically that talks about the public process and what does that look like.

It's an opportunity for you, again, to have communication with your community, the residents, and tenants that may be affected by an activity that you want to do. And they can provide feedback. This is a time for you to discuss those things. And it will be an important part of your supplement where you will be gathering their comments and ideas. This is, what I think about as, a collaborative process.

You're working together because you're going to want to take those comments back and will those comments actually encourage you or help you to really design the program that is going to work effectively in your community.

You're going to want to be including that when you go to submit your Moving To Work supplement and potentially proposing that activity, that that will be important information to

include because it'll be an important part to show that you really did engage with your staff and with your community about your Moving To Work program.

So that will be an important part. And if you talk to anyone from one of the initial agencies, they will say, "Engagement with your community is a key and a very important part of the process." And when you don't do it, things don't go well. I want to stress this again, have these conversations. Sometimes, they're easy. Sometimes, they're not.

But you want to engage in that, again, collaborative process to really have that experience that people feel that they are being heard and that they have a part. And people are always much more agreeable to things when they have a chance to weigh in and to share what they think about it. So I think that is it.

And as evidence of that process, I want to say regarding the questions about documents and the welcome email that was sent out by Marianne Nazzaro, she sent that to the executive directors from the agencies that put applications in. So that was the point-of-contact person that was named in the applications.

But if people on this call did not see those documents and had a chance to review them, if you email the [movingtoworkassetbuilding@hud.gov](mailto:movingtoworkassetbuilding@hud.gov) email box, we will absolutely share those with you. That's not a problem. So I think that's good. So anyone have questions about this slide? If not, if we can go forward to the next one. So these are steps four and five. It's submitting the supplement. So you will go through the public process.

And you'll get to, and you will be, submitting formally your Moving To Work Supplement in the supplement system. And you will receive approval or you may receive comments and questions from your field office. So you will be working in tandem with your field office. You will have a point of contact there who will be reaching out to you saying, "We received your submission. We want to talk to you about X, Y, and Z potentially. Let's see what happens."

But they will be the ones working with you. Those of us who are on this call right now at the HUD headquarters office will be desk officers and available also reviewing and looking at the supplement that you submit. And we will be working with them as they're reviewing. And they will be sending you an official approval letter from the field office. And when you receive that, that is the point in which you could look at implementing the approved activities.

You would not be able to implement activities before you receive that official approval letter. And when you think about, the name makes a lot of sense. You are going to continue to submit your annual PHA plan. And you will submit the supplement at the same time as an addendum to that plan. It's a supplement to that plan.

And we will be having, as the slides shares, upcoming webinars about the Moving To Work Supplement in detail, things that we've learned that have helped make it successful for everyone. So I strongly encourage you to join those webinars. I see a question. Is the supplement required board approval or does the board approval that HUD reviews and approves? Actually, the board approves prior to sending it in.



So just like you do your PHA plan, I'm assuming you send that past your board first. They approve it, and then you submit it to HUD. This is the same process that you would have with that. Are there any other questions about that piece? If not --

Linda Odum: I saw -- can you hear me?

Jenny Rainwater: Yes, I can. Go right ahead.

Linda Odum: I saw where we're required to have two public hearings. Normally, with our plan, we have one hearing. So we would have to have another, an additional public hearing.

Jenny Rainwater: Potentially. It's going to depend on what activity you are proposing to implement. And that information would be found in the Moving To Work Operations Notice. It depends on the type of activity that you're proposing or the type of waiver that you're wanting to implement. So it will tell you. And if it's something -- it's where you want to make sure that basically, people understand and have a chance to comment.

Not everybody is as willing to speak in front of others. But sometimes, you want to really drill in and make sure people understand in those cases.

Janet Pershing: Okay. I see Linda's got her hand up.

Linda Odum: No. I --

Jenny Rainwater: No. She just asked.

Janet Pershing: Oh, sorry.

Linda Odum: So I lower my hand now. I can --

Janet Pershing: Oh, okay. Looks like Gail had a similar question.

Jenny Rainwater: Does that answer the questions or is there anything else?

Linda Odum: Yes. I will take a better look at the supplement, of course.

Jenny Rainwater: Yeah. That's good. Did you say agency-specific waivers? I would say use the Moving To Work Operations Notice as your guide in what you're proposing and putting in your supplement. That will tell you whether or not you need to hold that second public hearing. Anything else? Any questions?

Mitzy Rowe: I do have a question. When you say waivers, is that like you want to do something different, unusual?

Jenny Rainwater: So when you look at the Moving To Work Operations Notice, there are -- somebody can correct me if I'm wrong, there are already some pre-vetted -- I think about them as pre-vetted waivers. And there are, what are called, safe harbors. There are conditions that if you are within those conditions, more likely than not, it will be approved pretty easily.

But if you want to go outside of that, that may require either a safe harbor waiver because you're wanting to waive something that says you can potentially implement this activity within this lane. But you're wanting to go a little bit farther over. That's maybe a Safe Harbor waiver. So there are two separate kinds of other waivers, Safe Harbor waivers and Agency-Specific where you're really wanting to design something new and different.

And in those cases, as you're looking at that, it may potentially then require you to hold a second public hearing, specifically about those waivers.

Mitzy Rowe: I see. Thank you.

Jenny Rainwater: It sounds complicated. But we really tried to not make it complicated. Well, if we don't have any more questions right now, I will hand it back over to you, Janet. And you're on mute, I believe.

Janet Pershing: Of course, I am. I think we're just going to go straight on to Wendalyn.

Jenny Rainwater: Straight to Wendalyn? Thank you. Thanks everybody.

Wendalyn Hovendick: Well, welcome back from break, everybody. And I hope everybody has learned a lot here today. So we're going to go over real quick some information regarding the 50058 form, which I'm sure all of you are very familiar with. And so, the 50058 form is actually a data collection that has three different forms. There's the one you're using right now prior to your MTW designation. There's the MTW form that the Initial-39 MTW agencies used.

And then there is a brand-spanking new form called the HUD 50058 MTW Expansion. And so, that is the form that you're going to be using to submit to HUD the information on your households, like you were doing previously on HUD 50058. Now, IMS/PIC, which some of us love and some of us don't, it has gained a little old and moldy. It does not have development support. And so, we could not put this new form into IMS/PIC.

And so, it is being build and actually is almost pretty much done. We're doing some final testing right now and what not in our new housing information portal or HIP system. And that's where you'll be submitting that form.

Now, once reason I want to clarify that we put this step here is because that form, potentially your reporting on activities that you've been approved to do in your MTW Supplement, whether it'd be you chose to do an alternate recertification schedule or something to do with rent or something else. And because of that, we needed that new form. It also help PD&R do some of the evaluations that they're going to be doing. And so, you're going to be using that new form. But it'll be in this new system. And we will be contacting PHAs as we get further out here about

actually moving over to the new system. So don't worry about that. You don't need to really do much with that. You will probably be talking to your software vendors about it because they are having to make adaptations to their software so that you will be able to use that new form. And it'll be able to integrate with the new system.

So as part of that process, the one thing to keep in mind is that we'll be migrating your building and unit data, if you have a public housing program, and your 50058 data to the new system. And so, basically, the day you land in the new system, you will just be maintaining your data as you were in IMS/PIC. You won't have to do creative little mumbo jumbo with 50058. You'll just be able to continue on with operations like you were before.

So more information will be coming about HIP about the changes that were made from the HUD 50058 to the HUD 50058 MTW Expansion as we get towards spring. And so, with that, I will see if anybody has any question.

Janet Pershing: There is one question, Wendalyn. When you say, "new system," can you confirm whether that means HIP?

Wendalyn Hovendick: Yes. So HIP is brand new. The first part of HIP you'll be using is actually the MTW Supplement because that is also inside of HIP. You'll get access to that, and you'll do your MTW Supplement. And then once we're ready to migrate you from IMS/PIC over to HIP is when you'll be able to get right to the rest of that data.

Janet Pershing: We're getting another couple of questions in here. So once migrated, will we no longer report in PIC?

Wendalyn Hovendick: That is currently the plan. I don't foresee that they're be a reason to continue using IMS/PIC. But I'll leave that door open a fraction of a percentage because we're still doing some of the development. But as far as 50058s go and if you have public housing, your building unit data, you will no longer use IMS/PIC once you're migrated.

Janet Pershing: And another one. If it's a PHA that ranks their own software rather than working with a vendor, who can they reach out to, to get more information?

Wendalyn Hovendick: I'm glad you ask that. I will put the email address in the chat that we have for, what we call, our vendor coms mailbox. But it would fit this situation as well. So just send an email to that mailbox. And I'll put this in the chat. But two things. One, let us know who from your PHA relative to vendor software. You would want to get communications from us because we're building a mailing list for vendors to be able to communicate with them.

And then also, in your email to that email address, just let us know that you are PHA that is in the MTW Expansion but that you have your own in-house software so that we'll be able to understand that.

Janet Pershing: And another one. Given that we are moving to HIP, we will be exempt from SEMAP. And if so, will we be exempt in time for our upcoming certification for fiscal year ending June 30, '23?

Wendalyn Hovendick: Great question again. So per the MTW Operations Notice, it does say that MTW Expansion PHAs are exempt from PHAS and SEMAP unless they opt in. Now, we yet to have any takers on the opt in. But definitely look at the operations notice. And if you want to opt in, definitely send an email to the asset building cohort mailbox. And I would also suggest copying your desk officer and field office so everybody's aware.

But you can get more information about that in the ops notice. And as far as when you would no longer need to do SEMAP, if you don't opt in, once your ACC Amendment is executed, so, you send it, HUD has executed it. And you have that MTW designation, from that point on, you would no longer do a SEMAP certification.

Janet Pershing: We have two more about vendors. One of which is, is it too soon to be in touch with them about this. And second, if they have questions, can they use the same email that you're going to drop in the chat?

Wendalyn Hovendick: So on the, is it to talk to your software vendors, I would say get your ACC out of the way first and get that all taken care of. Once you got your ACC executed and what not, I think it's fine to talk to them, especially if there's anything that on that side of the house that's going to need to be done. HUD doesn't really get too far into the weeds with the software vendor things. So I would just say definitely focus on your ACC first.

But then you can definitely start talking to them. And the email address, yes. Any of the software vendors can use that email address. And some of them already probably are. So if you have a vendor that you use for your 50058 software, you can pass on that email address. And they can write it as well.

Janet Pershing: And I see a hand from Linda?

Linda Odum: Yes. This is just to confirm I'm understanding. So now, with the MTW Expansion, we will use the new HIP system only for the MTW households, for -- not the MTW, but the flexibilities for those household. And then all our other HUD 50058, for instance, we're strictly use -- our will be strictly applied to the Section 8. So all our other HUD 50058 households will continue to be submitted through our regular PIC system.

Wendalyn Hovendick: So when you say that it's only going to be applicable to your Section 8 program, do you have public housing?

Linda Odum: Yes, we do have public housing.

Wendalyn Hovendick: I guess maybe we need to talk offline about why it wouldn't be applicable to public housing. But as far as the MTW Expansion 50058 goes, it can only be submitted in HIP. So once the times comes for you to use that form, it can only be submitted in

HIP. Until such time as we tell you, "Okay. On this date, we're migrating you out of IMS/PIC into HIP," you continue to use IMS/PIC. And you continue to use the HUD 50058.

Linda Odum: Okay. I think I understand. So once you are MTW agency, you have to migrate all your tenant and public housing data. That's what you're saying, regardless [talking to each other] program?

Wendalyn Hovendick: Yeah. But, I mean, there's -- well, do you. But like I said when I first started, you won't start using the MTW Expansion form until after you have an approved MTW Supplement so we know you're approved to use those activities. And the other thing is, too, we haven't migrated the first agency to HIP yet. And so, I mean, this is a brand-new system. We've been doing a lot of testing and what not.

And so, we're going to be starting that process and crossing fingers, toes, and my dog's four legs everything'll go well. And we'll continue down that road. And then they'll come a point where we'll start notifying PHAs, "Okay. You're coming up on the list. Are you ready to migrate?" So that's down the road a little bit.

Linda Odum: Thank you.

Janet Pershing: And Wendalyn, we do need to move on. But there's one other question I think you can answer real quick which is the case management software vendor that one of the PHAs is working with. Yardi does a lot of work with HUD. Is the HIP reporting system something that HUD is working with those outside vendors to help ensure smooth migration [talking to each other].

Wendalyn Hovendick: I can tell you, Yardi's one of them we're working with.

Janet Pershing: So there you go. So if we can -- and we will hear more from Wendalyn about this. I know there are lots of questions about how this is going to work. We'll definitely dig into some of those weeds. But if we can, I'd like to go ahead and ask Elizabeth to give us some information about coordinating on the research side of things.

Elizabeth Rudd: Thank you, Janet. And also, Bethany should come on screen. So as I mentioned before, I'm Elizabeth Rudd. And I work in the Office of Policy Development and Research at HUD. And I'm responsible for managing the evaluation of the asset building cohort. As you may recall, when Congress allowed the MTW Expansion, they, in their infinite wisdom, also mandated that we do evaluations.

So we have an evaluation contractor represented today by Bethany Boland who's going to briefly introduce herself. Bethany?

Bethany Boland: Sure. Great. Hi, everybody. I'm Bethany Boland. I'm a senior research associate at MEF Associates. And I'll be serving as the project manager for the research, design, data collection, and analysis plans for the MTW Expansion Asset Cohort. Good to be with you.

Elizabeth Rudd: Thank you, Bethany. So I just want to emphasize today a few key points. First, in the first year, so, from now until next October, our research objective is simply to design the research, to design the research that it will be able to find out how the savings programs and the rent reporting programs that you, the asset building cohort PHAs, implement will end up affecting the HUD assistance balance.

And as you think about designing your program, one of the tasks of the evaluation contractor, represented today by Bethany, called MEF Associates, will be to provide you with up-to-date research on savings and rent reporting for credit building, and in particular, on what types of programs are likely to have a positive impact on families. And we are hoping that you will take this to heart and try to design and implement programs that are robust enough to have an impact.

Also, we and MEF Associates will provide you with information on the research designs as they develop because the research design will affect how you roll out your programs. In particular, we need to have comparison group of families that don't participate in your program, whichever program you end up implementing. But we will still need to study those families even though they are not participating in the program. And this can get tricky.

And on a final note, MEF Associates will need your input on what a PHA and your PHA in particular, can reasonably be expected to take on as part of the evaluation research so that they will end up with a research design that is actually feasible in the real world in working with your PHAs. That's all I have to say about the evaluation today. If we have time, we can take questions.

Janet Pershing: So anybody -- we will clearly have much more conversation about evaluation. If they're any quick questions now, though, please chime in.

Mitzy Rowe: I have a question in regard to -- so, does this mean that we will have to submit information on the families participating in the Moving To Work cohorts that we shows and also, on the remaining residents?

Elizabeth Rudd: So we hope not. We hope that we can get the information that we need just from regular information systems and also from talking to the families themselves. This time, we're not planning to ask the PHA to especially provide information. Although, I can't rule that out.

Janet Pershing: Thanks, Mitzy. And Elizabeth, I am looking at the clock. So I think we will go ahead and move to our other topics. And if they're a few minutes at the ends and folks have other questions, we can come back to. Otherwise, there will be other chances to talk with Elizabeth and Bethany. So let's move on to talking about the asset building community of practice.

So one of the things that is going to be coming your way in addition to these webinars to help orient you to the MTW program is a community of practice. Really, all of you have taken on some aspect of this asset building. But it's new to many of you, most of you, perhaps. There's a lot that you can learn from each other about how is one group tackling it versus another. There are things that you might benefit from hearing from the outside.

We are looking to create for you a community of practice where you'll be able to develop ideas about what to do, find [inaudible], and really further the goals of the cohort to really make asset building effective. We're going to start that by talking with you about what you think would be most helpful to you in these community of practice sessions.

So on November 10, we will be having, what we're calling, a visioning sessions, which will be specifically for you to talk about the kinds of things that you feel like you need and the format in which you think that would be most effective for you. So just be aware that that session on November 10 is coming up. Do a little bit of thinking in advance of that about -- you're going to have a community of practice available to you. What is going to make it most valuable.

You will also see on the slide, and you can get from the slide deck that's been sent to you, some of the information that was provided previously about asset building and credit building. So if you want to take a look at those for any reason, to just refresh yourself on what has been shared already, those links will be available to you on the slide. Let me go on now to the resources section. So there are a lot of resources available.

And one of the things prior cohorts have mentioned to us is that it can be a little overwhelming because there is so much available, it's hard to know what to go to. And so, they recommended that we actually walk through some of these resources at the beginning with new cohorts. So that's what we want to do with you here today.

As we had in the chat earlier, there was the welcome letter that came to your executive directors, some information about timeline, and some information about resources. We'll be sure through Jenny that that's getting out to everybody that people are getting the live links. As we talked about a couple of times, the operations notice is completely critical to everything that you do. It really should be the place that you go first to get your questions answered.

Obviously, you can talk to the field office. You can submit questions to the mailbox. But that operations notice is critical. And there's a link to that provide here on the slide. There's also the Moving To Work page on HUD.gov. And if we can, Lara, let's just go to that Moving To Work page for a minute and show people rather than just eluding to it what is actually there.

So when you go to the MTW page, you will see lots of information about the demonstration program itself. And if you scroll down, you'll find lots of documents about the general program. But as you go down, you will get down to the MTW program expansion. You can see a section there with several different links. If you go to that expansion information page, that is the place that you're going to get the most salient information for you at this point in your MTW journey.

And I'd like to just focus on a couple of the links on the right-hand side that I think are particularly helpful. The second link, we won't go to. It's the formal federal register version of the operations notice. But the MTW Office has created for you a much more user-friendly version. So if you go down to the next set of bullets, that Section 6 is where you're really going to see what the operations notice looks like.

So that's a very quick link to it in the easiest format to read. You'll also see below that there are MTW operations notice FAQs. The cohorts that have gone before have had some great questions and you can get a lot of your questions answered by just taking a look through those FAQs. You'll also see that there's a section on the supplement. As you've heard, we're going to be talking about that in lots of detail, but not for three or four more webinars.

So you don't need to look at that in detail right now. But when the time comes, keep in mind if you need the form, if you need instructions, if you need guidance about how to fill it out, this link will take you to all of the resources that have been assembled for you. And there's also a set of MTW Supplement FAQs. So this section of the Moving To Work Expansion page on HUD.gov is a wealth of information. And you'll see there's a lot of other information.

But I really wanted to highlight how you get to the operations notice and how you get to the information about the supplement. If we could, let's then go to the HUD Exchange page, Laura. One of the things that the MTW Office has done is invested a good bit of energy in making sure that there are technical assistance materials available to agencies that are engaging in MTW. And this page on the HUD Exchange is where you're going to find those resources.

If you haven't ever use the HUD Exchange, you will need to create an account when you first sign in, just username and password. And then you'll be able to get to lots of information on the HUD Exchange. You will find if you get to this page, the first little green dot on the left provides you with a brochure that talks about the MTW program in general. So if you need something that explains the program, that gives you access to that.

The second bullet is one that is going to give you access to a handy-dandy job aid that I think you could find pretty helpful. We can take a look at that job aid, Lara. The job aid essentially goes through the steps that we've described to you today. And it gives you the links step by step to the most salient helpful things for you at that point in your process. So there's some general resources. But then it talks about public engagement, the ACC Amendment process, etc.

So if we look at the ACC Amendment process that Chris talked us through earlier today, you can see here that there's some links to reference documents, that there is an actual webinar that we have linked here about how to work on the ACC. There's also a form. The actual form can be accessed from here. And then there's some information at the very bottom reminding you about the execution which we've talked about a couple of times here.

But if you forgotten any of the details, this document puts it all in one handy-dandy place. So it's a great place to go to just for a reminder about what are my most helpful documents at this point. If we go back to the HUD Exchange and go to the next bullet, you can see this is the MTW Expansion training.

This training essentially lays out for you in a lot of detail what is in the operations notice in a way that it's been broken down into nuggets that we anticipate will be straightforward for people to adopt. And so, let's take a look at that if we could, Lara. This is what the training will look like when you get to it. If I could just start on the left with the table of contents, you can see that it walks through the basics.



But then statutory requirements, what are the types of waivers, how do you select your activities, basically, all the steps you're going to go through as you get your programs stood up and running. I'd like to take up one quick look at the all-available MTW waivers sections. This is going to essentially capture the information that's in the operations notice. And it's particularly useful because you can go through hyperlinks to this list of all available waivers.

And it will show you this grouping of 17 categories of things that you might be interested in. You can then hyperlink to, say, No. 4, landlord leasing incentives. I heard somebody talking earlier about some interest in that topic. When you click on that, it's going to open up for you the three types of activities that you can undertake in that category. And you'll find something similar under each one.

If you open these up, let's do damage claims just as an example, it shows you exactly what you need to know about what's permitted for the activity, what statutes are being waived because you'll need that information as you put together your supplement. And then it talks about the safe harbors. And we'll talk a lot more about safe harbors and what they are in future trainings. But you got it all in one place in this training document.

I'll also point out at the top of that left-hand column, there's a search feature. So if you didn't know exactly where to look for this, you could just type in, say, the word, "landlord." And it will give you the hits on landlord in this training document which will include -- the top of the list here, the landlord leasing incentive waiver. So you can navigate this training using that search function. Training has a couple of features that I think it's useful to know about.

One is if you go back to the very top of the welcome, you can see the video that you viewed earlier today. There are a number of these videos embedded throughout when you get these gems of wisdom from the MTW agencies that went before this expansion, really motivating and insightful snippets from a number of different folks from the other agencies. You'll also find in a lot of places throughout little links to the operations notice.

It links to the specific part of the operations notice. It list for you exactly which section you want to be looking at related to the part of the training that you been looking at. So those operations notice links can be super helpful. And finally, there's some interactive trainings that have been built into this overall training package. So as you read through, you'll come to some spots where there is an actual interactive training that you can click on.

It lets you go in and see some scenarios that you work through those yourself, give you some tips and tricks about how to go about working through the problems that you're encountering or the problems you're trying to address in your community. So that is the expansion training available to you. Back to the green dots if you would, Lara, the next green dot over. This is one more place to get to that operations notice. You will hear a theme here.

And the final dot is thinking about this expansion webinar series. This is the fourth cohort to go through the welcome webinars. The webinars from all the prior cohorts have been posted here. And as these webinars are posted, there will be a section for you to go to find any particular

webinars that you either missed or want a chance to review a section of. Typically, these are posted a week to ten days after the webinar has taken place.

But you'll always have the PowerPoint presentation emailed to you in advance with the joining information. If we can go back to the PowerPoint, Lara. You'll see that the last two links on this resources page link you to the two key things that I just walked you through. One, to that expansion training and the other, to the link for the expansion webinars.

So this link which is in the file that you received for the joining instructions today gets you to all of those places that we just talked about. We've got just another couple of minutes. I will grab a question or two if we can. But Lara, let's first look at some of the next final slide because I want you all to be aware of the upcoming schedule. As I mentioned earlier with regard to the community of practice, there will be a visioning session on November 10.

Note that that sessions runs from 2:30 Eastern to 4:00. All the other sessions are scheduled for two-hour block. That one is a bit shorter. So don't get fooled. In general, we have two-hour blocks allocated. You can then see the two finance planning sessions that we have on November 16 and then January 11 will get you the most critical information first on the 16th and then follow up with a lot more detail on the 11th. Phillip will be leading us through that.

And then we've got two separate sessions on the supplement. The first one talking about what the supplement is and how the public process fits into that. We had some discussion about that earlier. That'll be February 22. And then on the 15th, some tips for success in filling out your MTW Supplement. In April, Wendalyn will be taking us through the 50058 Expansion changes. So we'll get a deep dive into that.

And then on April 26, they'll be an office hour to just give you a chance to ask about anything that has not been covered or has been blurred in your memory over time. So those are the upcoming sessions. I see a couple of questions. And Phillip, I think this one is for you. Do our fee accountants need to join the finance-related sessions? Do you recommend that those fee accountants join?

Phillip Pless: Yes. I would definitely say so because we're going to be covering how, for example, things like VMS reporting is going to change. But even more importantly, we're going to be talking about how FDS or financial data schedulers, going to be some changes to how you report that. We'll get into a lot more detail. But yes, I would strongly suggest anybody in your finance department be involved in both of those sessions. And I think it would be very helpful.

Janet Pershing: Thank you, Phillip. The original invitations for this series went to the executive directors and have hopefully been shared around with folks who need them. But definitely feel free to continue sharing the link to anybody that you think can benefit from some or all of the sessions. See a note from Gary saying that you are thankful for the effort in supporting the MTW agencies in this journey. And I second that, Gary.

I think the MTW staff is really committed to success. And I think that the idea that failure -- it does not seem an option or even possible. I think that's where we're going. So if you have any

additional question that we didn't get a chance to answer, you can send them the asset building email address. And we can make sure that we get back to people with some information. But otherwise, I will close us out with that.

And thank you very much for your attention, your participation, and your energy around MTW. Thank you very much, everybody. Have a great rest of your day.

Linda Odum: Thank you very much.

(END)