

Year 4 Annual Telephone Interview with MTW PHAs

Interview respondent is the PHA Executive Director, MTW Coordinator, and/or one or more designated staff. The interviewer will prepopulate information from the prior year's interview and MTW Supplement. The prepopulated information is highlighted in yellow.

Introduction and Verbal Consent

HUD has hired Abt Global to study the MTW Expansion Flexibility Cohort. The purpose of the study is to understand how PHAs in the cohort use their MTW flexibility and how MTW affects outcomes for the PHA and its tenants. We are interviewing all the PHAs that received MTW Flexibility Cohort designation.

Your participation in this interview is voluntary and you are free to skip any questions you do not wish to answer. The questions in the interview have been reviewed by the Office of Management and Budget (OMB) under the Paperwork Reduction Act of 1995. We expect the interview to take about an hour. The OMB control number is 2528-0328, expiring 03/21/2027.

The study team will use the information you provide for research purposes only, not for any audit or compliance purposes. We will be taking notes but will not be recording this call. Only members of the study team will see your individual responses. Our reports to HUD will summarize the results from the interviews but will not name individuals. If we would like to highlight information that is not publicly available about your PHA by name in one of our reports, we will give you the opportunity to review the text in advance.

There may be some questions you are not able to answer or that are more appropriate for other staff. If you are unable to answer a question or would prefer not to answer, just let me know. You are free to skip any question you do not wish to answer.

Do you have any questions before we begin?

Introduction - For all PHAs

Interviewer start with a summary of where the PHA was when we last spoke [e.g., When we last spoke with you in [month] 2024, you had an approved MTW supplement/your first MTW Supplement was still under HUD review/were working on your first MTW Supplement. Jump to question 1]

1. How have things been going with your program since we spoke around this time last year?
 - a. What were the highlights of the last year?
 - b. Did you experience challenges in implementing your program?
2. Have there been any changes at the PHA, such as leadership or Board changes, or change in the community which affect the MTW program?
3. How many people did you serve in the following programs in the month of December 2024?

Public Housing: _____

HCV: _____

Funding Flexibility – For all PHAs

4. When we last spoke, your agency (was using/was planning to use/was not using) MTW funding flexibility. Has the agency made any changes to its use of funding flexibility? If so, describe the change and the reason for the change.
5. **If currently using funding flexibility:** How did you use funding flexibility in the last year? What were your main objectives for using it?
 - a. Which funding streams did it affect, this is, where did you take the money from and what did you use it for?
6. **If not currently using funding flexibility:** How does your agency plan to use its funding flexibility in the future, if at all?

Status of MTW Supplement – For all PHAs

7. I see you [have/do not have] an approved MTW Supplement as of [date]. Is there any update on that? [*Depending on the date of last approval, probe for whether they're working on their upcoming submission.*]
8. **For PHAs without an approved supplement only:** Have you experienced challenges developing the MTW Supplement? If so, describe.
 - a. When do you expect to have the Supplement finalized and approved?
 - b. What waivers are you planning to request approval for in your MTW Supplement this year?
 - i. **For each planned waiver:** How will this activity differ from how your PHA operated before obtaining the waiver?
 - ii. What problem or issue are you trying to solve by implementing these activities?

Changes in Program Goals and Activities—For PHAs with two or more approved MTW Supplements

Now I would like to review the changes that your agency made to your MTW program in your latest MTW Supplement.

9. **For PHAs that appear to have added new activities in our review of MTW Supplement:** It looks like the PHA has identified new activities to implement, X and Y? Do I have that right?

- a. Can you tell me why added those activities?
10. **For PHAs that appear to have discontinued some activities:** It looks like the PHA has decided to discontinue activities **X and Y**? Do I have that right? Can you tell me why you decided not to pursue those activities?
 11. **For PHAs that have modified previously approved activities:** It looks like you've updated **[XYZ]** waiver(s) in your latest supplement to **[insert what edits were made to the waiver(s)]**. Can you tell me why you made those changes?
 12. Are there any other changes to how your agency plans to use its MTW authority that we haven't mentioned? If so, what are they?

Plans for MTW Waivers and Activities – For PHAs with one or more approved MTW Supplement

13. **If form pre-filled by Abt from MTW Supplements is not confirmed or missing info:** For each of your approved waivers, when did you start implementing them? Were there any gaps in implementation?
 - a. **[insert list of waivers from most recent approved MTW Supplement]**
 14. **If the PHA confirmed form pre-filled by Abt from MTW Supplements:** Thank you for confirming the table with information about when you started implementing your waivers. *Ask any clarification questions needed.*
 15. **For PHAs using agency-specific waiver(s):** How did you determine that you wanted to pursue an agency-specific waiver(s) versus the existing set of waivers covered by the Operations Notice?
- Ask for each approved MTW activity** (for PHAs with lots of waivers, will need to group or focus on potentially high-impact ones to be determined advance of interview):
16. **If new activity from last year's interview:** What problem or issue are you trying to solve by implementing this activity?
 - a. Can you explain the connection between the activity and the primary statutory objective(s) **[cost effectiveness/self-sufficiency/housing choice]**?¹
 17. **If new activity from last year's interview:** How does this activity differ from how your PHA operated before obtaining the waiver?
 18. Can you describe what steps you have taken to implement this activity in the past year?
 - a. What share of tenants/public housing residents does/will it affect?
 - b. **If the PHA has special purpose vouchers:** Does this activity apply to any residents in your special purpose voucher program(s)? If so, how many residents do you have in these programs that will be affected?

¹ It may not be necessary to go through this in all cases. Some activities will be associated with one objective only and the connection will be obvious.

19. What challenges, if any, have you had in implementing this activity?
20. Have there been any changes to how you are implementing this activity compared to when you started? If so, why?
21. Has implementation of this activity been delayed in any way? If so, why?
22. Has this activity changed how you interact with tenants or other aspects of your work as a PHA? If so, how? (*For activities not yet implemented, ask about future expected effects.*)
23. **(If applicable)** How have landlords responded to the changes imposed by this activity?
 - a. ***For landlord incentive and other housing choice related activities:***
 - i. Has the activity resulted in more landlords engaging with the PHA? If so, how many more landlords are you working with?
 - ii. What have you done to promote the change to landlords?
24. Has this activity had any effect on PHA staffing? If so, when did these changes happen? How are you measuring changes in PHA staffing?
 - a. For waivers that resulted in staff efficiencies, ask:
 - i. How much staff time do you estimate has been saved from this activity?
 - ii. How have you repurposed that staff time? (Probe for what additional activities staff have taken on—such as increased tenant outreach and interactions, providing housing navigation support—or whether positions have switched to part-time or been consolidated)
25. Has the activity begun to show results related to the statutory objective(s)? If not, when do you expect to see results?
 - a. What are the specific results you would expect to see?
 - b. How are you measuring and tracking the results? If not measuring, how do you know the activity is having the intended results?

Ask in general for MTW activities: *[have a table of waivers ready, and be prepared to show your screen with a separate table of waivers or put a table in the meeting chat if the PHA has a lot]*

26. Have any activities implemented so far resulted in cost savings? If so, which ones and how?
27. Have any activities implemented so far increased your costs? If so, which ones and how?
28. **For PHAs with HCV programs that showed reduced utilization:** Our findings from last year's report indicate that unit utilization is down for Flexibility Cohort PHAs. Do you have a sense of what might be driving this?

29. **For PHAs with Public Housing programs that show a decline in REAC score:** Our findings from last year's report indicate that public housing REAC scores are down for Flexibility Cohort PHAs. Do you have a sense of what might be driving this?
30. **For PHAs that have activities with a hardship policy:** It appears that the following activities have a hardship policy: (prefill from the MTW Supplement).
- a. Have you received any hardship requests in the past year regarding any of these activities?
 - i. If so, which ones?

For each activity, ask:

- b. How many requests have been approved? Denied?
- c. What are the main reasons requests are denied?
- d. How many households have been asked to leave the public housing/HCV program for lack of compliance with the activity?

HUD 50058 - For PHAs with one or more approved MTW Supplements

31. Thinking about the MTW activities for which you have approval, are there any MTW activities that you are unable to submit data on in IMS/PIC the via the HUD-50058? (*Note: if they are confused/unsure about which activities are involved, mention changes to calculation of TTP, recertification schedule*) If yes:
- a. Which activities being implementing are impacting your ability to submit 50058s to IMS/PIC?
 - i. What about these activities is affecting your ability to submit 50058s? (*e.g., PHA software not ready to capture this information, current IMS/PIC cannot accept upload of the updated fields for MTW waivers*)?
 - ii. How are you handling record keeping for these activities? (*e.g., not submitting records, leaving fields blank in the 50058, using separate record keeping systems*)?
 - b. What percentage of households are impacted by this activity?
 - i. What/which type of households are not being included in 50058 reporting? In what month did they stop reporting on those households?
 - ii. Are you still submitting data for households not affected by an MTW activity that you cannot report in PIC?
 - c. Does the data you are able to report to PIC reflect all the people you serve in the public housing and voucher program? (If no, please explain_____)
32. **If not already answered:** Are there any MTW activities for which you have HUD approval that you are opting *not* to implement until HIP is fully rolled out? If so, which activities?
33. **If not already answered:** Are there any MTW activities for which you are waiting for HIP to be fully rolled out before applying for the MTW waiver? If so, which activities?

Lessons Learned and Wrap Up - For all PHAs

34. Thinking back over the past five years, how have your plans for using MTW flexibility changed? In other words, how did your initial plans for using MTW flexibility vary from how you are using it now?
 - a. Which areas, if any, were you were hoping to address using MTW flexibility when you applied for MTW that you are no longer planning to pursue?
35. How do you plan to use MTW flexibility in the future?
 - a. Are there waivers or additional flexibilities you plan to start implementing in the next five year? If so, which are they?
36. Thinking back over your experiences with MTW thus far, which MTW flexibilities do you view as most critical to achieving your PHA's goals? Why?
37. Which waivers have been the most difficult to implement? What about them is hard to implement?
38. **If applicable:** Many PHAs in this cohort have opted to implement [less frequent re-examinations] [changes to minimum rent] and [landlord incentives – if HCV], but your PHA has not. Why has your PHA opted not to pursue these?
 - a. Are there aspects of these waivers that you find unappealing?
39. Can you identify any lessons that you have learned in implementing your MTW activities in the past year?
40. Based on what you've done so far, do you think receiving MTW designation has been beneficial for your PHA or residents?
 - a. Do you think your HCV and/or public housing programs are better for having MTW flexibility?
 - b. If you had it all to do again, would you still apply for MTW flexibility?

This is our final interview for the evaluation. Thank you very much for your time today and for speaking with us over the past five years. Do you have any questions for me before we end the call?