



Entry Form 2017 Annual Awards for Program Excellence

Entry Deadline: Thursday, June 15, 2017, Midnight ET

Each entry must include a completed entry form. Please complete a form for each entry your HFA is submitting. The completed entry form will become the first page of your entry.

This form is a fillable PDF. Type your information into the entry form and save it as a PDF. Please do not write on or scan the entry form. **Questions: Call 202-624-7710 or email awards@ncsha.org.**

Entry Title: Enter your entry's title exactly as you wish it to be published on the NCSHA website and in the awards program.

Category:

Subcategory:

Entry Summary: A 15-word (max) summary of the program, project, or practice you are entering.

HFA:

HFA Staff Contact:

Phone:

Email:

Visual Aids:

Are you mailing to NCSHA 10 copies of any visual aids that cannot be included in your entry PDF? Yes No

Payment:

My HFA is mailing a check to NCSHA.
My HFA is emailing the credit card authorization form to awards@ncsha.org.

**Minnesota Housing
Multifamily Customer Portal
Management Innovation: Technology**

For three years, our staff has been collecting feedback from our customers on how to improve their experience of applying for our multifamily funding. We've also looked at our internal process for receiving and processing applications. In order to eliminate duplication of work, improve tracking systems, clarify roles and responsibilities, and increase overall efficiency, we developed a new Multifamily Customer Portal using Salesforce as a base technology.

This web-based Portal allows developers and processing agents to create an account and custom-build an application checklist based on the type of proposal they are putting together. This helps ensure they have the correct documentation for their application. Many of our customers submit more than one application per year, and the Portal will allow them to see all of their applications and selected projects in one place. The system also allows us have a completely paperless application process for the first time.

Our staff and our funding partners are now able to access the same system to review applications for scoring and selection. After an application is selected, the system will facilitate our due diligence process, allowing us to create a checklist for the customer, so they can see exactly what they need to do to get to the closing table by their desired closing date.

The Portal was launched for the 2017 funding round, and has received extremely positive feedback from both funding applicants and our staff. As of this nomination submission, 91 customers are working on 88 proposals in the Portal. In a typical annual competitive RFP cycle, Minnesota Housing selects 25-30 developments for funding with housing tax credits and/or deferred loans.

Application Process Before the Portal

Prior to the launch of the Portal, the application process was time consuming and cumbersome for Agency staff and our customers.

Customers had to navigate and download numerous materials on our website to determine which ones were necessary for their particular application. They also had to submit hard copies of their application – often totaling as many as 500 pages – in addition to providing the materials electronically on a CD or through box.com. This was very resource intensive in both customer and staff time and wasted paper.

On the staff side, our previous database took approximately 45 minutes per application to manually import the data. Our average funding round receives 80-100 applications, so the staff time to upload this information was very inefficient and it took days to access application information after the due date. The Portal will also allow staff to more easily access project data and have greater flexibility to build reports. In an already tight timeline to process applications, a few days that we no longer have to wait for reports to be complete after the due date allows our staff to start on application review much sooner.

What the New Portal System Provides: Benefits to Customers and Staff

Some of the objectives we achieved in this project that were a priority to improve the customer experience include:

- Create paperless application
- Automate capture of documents
- Simplify application checklist, so users don't have to read about 100 documents to know which apply to their deal
- Improve communication of application process and visibility of informations
- Improve due diligence communication and tasks

Powered by Salesforce, the Portal allows customers to log in to a user-friendly online system and custom build an application checklist based on the type of proposal they will submit. This checklist tells them the exact documents they need to complete, provides links to templates, has help text for each checklist, and the system lets them upload all materials in one place through an easy-to-use interface. After selection, the Portal will be used to collect due diligence materials, and track critical milestones in the loan closing process.

Customers also have the ability to view the current status of submitted materials, filter documents and track approvals, timelines and status of each development. The Portal gives developers dashboards to easily access all developments in various stages (application, underwriting, closed etc.) in one location and, over time, they will be able to view all of their submitted applications with our Agency.

Attachment A shows a view of the application checklist that customers see when putting an application together, with descriptions on the next page.

From the internal perspective, Minnesota Housing's staff of underwriters, architects, supportive housing and asset management team members can collect due diligence materials, track milestones and communicate with developers and the internal development team. The Portal also has a Task function, which clearly identifies the subject, status and people assigned.

While the ultimate vision for the system is to have development information from application through the compliance period, the first phase of this project is to concentrate on the application phase. Developers can currently use the Portal for the following processes: pre-application, application, due diligence, carryover, preliminary determination (for developments with 4% Housing Tax Credits), and 8609 application.

For our internal staff view, you can see in the screenshot below (**Attachment B – Internal staff view of Portal**) that staff can pull different reports based on what they want to see, such as developments assigned to them for review, all projects under one developer or even those that applied, but were not selected. There are also quick dashboards to get a real-time view into how many items we have in various statuses within the Intent to Apply (ITA) and Application processes.

Keys to Success

Creation of a Multifamily Customer Portal system using Salesforce as the base technology is replicable for any Housing Finance Agency, as Salesforce is a cloud-based software solution that is very customizable. The most important first step is to fully understand the business needs by documenting the current business practices, and to have input from staff and customers on how the process must be supported.

Configurable design is a very important to creating a solution that can not only be replicated by other Housing Finance Agencies but is also critical for Minnesota Housing as it enables our business and program teams to configure and execute other funding rounds with different dates, funding sources, phases, and documents without having to custom code for each solution.

Having a dedicated business team and technology team working together is key in making this a success. At Minnesota Housing, the core team consists of three subject matter experts (SME) from our business team and three SMEs from our technology team working collaboratively to design and launch the Portal. The core team meets regularly to discuss business processes, determine how to customize Salesforce functionality to improve our day-to-day work, and to develop training resources for customers and internal staff. It is critical to have this team think creatively and to be open to making changes to business processes. It is also vitally important to have the support of leadership, including access to sufficient resources to implement the changes.

Attachment A - Application checklist

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Build Checklist **View Checklist**

To display checklist items associated to specific filters under the "Application" phase, select the desired filters.

Filter by Characteristics

Application Characteristics

- Common Application Forms
- HTC Self-Scoring Worksheet & Deferred Priority Checklist Supporting Documents
- New Construction **1**
- First Mortgage
- Housing Tax Credits
- Dual Application
- Permanent Supportive Housing for Households Experiencing Homelessness

Filter by Upload Status

- Not Uploaded **2**
- Uploaded
- Opted Out
- File Has Errors

62 checklist item(s) do not have documentation uploaded and/or have not been opted out. Once all checklist items have the upload status of "Uploaded" or "Opted out," you will be able to submit your checklist items.

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Checklist Item	Upload Status	Due Date	Approval Status	Quick Links
4% HTC Syndicator/Investor Letter of Intent	Not Uploaded	6/15/2017	Unsubmitted	No associated template
Greater Minnesota Workforce Strategic Priority	Not Uploaded	6/15/2017	Unsubmitted	No associated template
HTC Worksheet & Deferred Checklist Detail Sheet	Not Uploaded	6/15/2017	Unsubmitted	No associated template
Minimum Thresholds (HTC)	Not Uploaded	6/15/2017	Unsubmitted	View Resource
Planned Community Dev. Strategic Priority (Def)	Not Uploaded	6/15/2017	Unsubmitted	No associated template
Tribal Strategic Priority	Not Uploaded	6/15/2017	Unsubmitted	No associated template
Access to Higher Performing Schools	Not Uploaded	6/15/2017	Unsubmitted	View Resource
Affirmative Action Certification	Not Uploaded	6/15/2017	Unsubmitted	Download Document
Applicant Certification of Environmental Issues	Not Uploaded	6/15/2017	Unsubmitted	Download Document
Bond Test Analysis at Application	Not Uploaded	6/15/2017	Unsubmitted	Download Document
Comparable Properties Profile	Not Uploaded	6/15/2017	Unsubmitted	Download Document

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Checklist Item	Upload Status	Due Date	Approval Status	Quick Links
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Greater Minnesota Workforce Strategic Priority	Not Uploaded	6/15/2017	Unsubmitted	No associated template

Attachment A continued – Description of checklist

Project Checklist – Descriptions and Definitions		
View#	Description	Details
1	Upload Status Filter option	Allows user to filter what is displayed in the Checklist View (3) based on the upload status (whether or not documents have been uploaded).
2	Filter by Characteristics option	Allows user to filter what is displayed in the Checklist View (3) based on the characteristics previously selected on the 'Build Checklist' tab.
3	Checklist View	Displays all the checklist items required for you to submit based on your selected project characteristics on the 'Build Checklist' tab.
4	Checklist Item	This field displays the name (s) of item(s) required for submission.
5	Upload Status	This field indicates whether you have: <ul style="list-style-type: none"> • 'Uploaded' File(s) → you have successfully uploaded at least one (1) file to this checklist item. • 'Not Uploaded' file(s) → indicates that you have not uploaded any file(s) to this checklist item. • 'Opted Out' (if applicable) → indicates that this checklist item is not relevant to your project. Only applicable on certain checklist items. • 'File Has Errors' → indicates the file you uploaded has errors, see the error messages by clicking the checklist item.
6	Due Date	This field indicates the due date of the checklist item.
7	Approval Status	This field indicates whether you have submitted your checklist items or not.
8	Quick Links	This is a hyperlink to documents, websites or resources provided by Minnesota Housing.
9	Checklist Submission	This is a running total of the number of checklist items that either need to have documentation uploaded or will have the option to 'opt out' (if applicable). Once the status of ALL checklist items indicates 'Uploaded,' a 'Submit for Review' button will be enabled.

Minnesota Housing Multifamily Customer Portal Management Innovation: Technology

Attachment B – Internal staff view of Portal

The screenshot shows the internal staff view of the Minnesota Housing Multifamily Customer Portal. The navigation bar includes 'Home', 'Funding Round', and 'Projects'. A dropdown menu for 'View' is open, showing options like 'All Projects', 'My Assigned Projects', and 'Recently Viewed Projects'. Below the menu is a table of projects with columns for 'D #', 'City', 'Account Name', 'Funding Round', and 'Project Status'.

	D #	City	Account Name	Funding Round	Project Status
Edit	D7990	Willmar	Commonwealth Development Corporation	2017 RFP/2018 HTC Round 1	In Process
Edit	D7943	Detroit Lakes	D.W. Jones Inc	2017 RFP/2018 HTC Round 1	In Process
Edit	D7998	Big Lake	Aeon	2017 RFP/2018 HTC Round 1	In Process
Edit	D7987	Chaska	Landon Group LLC	2017 RFP/2018 HTC Round 1	In Process
Edit	D7999	North Branch	Commonwealth Development Corporation	2017 RFP/2018 HTC Round 1	In Process
Edit	D7956	Cloquet	Roers Investments	2017 RFP/2018 HTC Round 1	In Process
Edit	D7991	Duluth	One Roof Community Housing	2017 RFP/2018 HTC Round 1	In Process
Edit	D7941	Alexandria	D.W. Jones Inc	2017 RFP/2018 HTC Round 1	In Process
Edit	D7934	Minneapolis	Hope Community, Inc.	2017 RFP/2018 HTC Round 1	In Process
Edit	D8005	Roseville	SCI Associates, LLC	2017 RFP/2018 HTC Round 1	In Process

