2014 Entry Form
(Complete one for each entry.)

Fill out the entry name *exactly* as you want it listed in the program.

Entry Name Rental Development Tracking Tool

HFA Michigan State Housing Development Authority

Submission Contact Mary Lou Keenon

Phone 517-373-0011   **Email** keenonm@michigan.gov

Qualified Entries must be received by **Tuesday, July 1, 2014.**

For more information about Qualified Entries, click here to access the 2014 Entry Rules.

Use this header on the upper right corner of each page.

HFA   Michigan State Housing Development Authority

Entry Name   Rental Development Tracking Tool

Communications	Homeownership	Rental Housing	Special Needs Housing
☐ Annual Report ☐ Promotional Materials and Newsletters ☐ Creative Media	☐ Empowering New Buyers ☐ Home Improvement and Rehabilitation ☐ Encouraging New Production	☐ Multifamily Management ☐ Preservation and Rehabilitation ☐ Encouraging New Production	☐ Combating Homelessness ☐ Housing for Persons with Special Needs
Legislative Advocacy	**Management Innovation**	**Special Achievement**	**Are you providing visual aids?**
☐ State Advocacy ☐ Federal Advocacy	☐ Financial ☐ Human Resources ☐ Operations ■ Technology	☐ Special Achievement	■ YES ☐ NO

Background:

During the Value Stream Assessment that was done with regard to the MSHDA Rental Development Direct Lending Process, it was found that there was a lack of near real-time information and assessment of multifamily developments within the loan process.

This lack of this information caused delays, confusion and miscommunications. To address the issue, a tracking tool was proposed and put on the "front burner" as a top priority in MSHDA's Rental Development division by division Director Chris LaGrand.

In July 2013, MSHDA staffer, Mark Whitaker and Michigan Department of Management and Budget IT employee Mike Underwood were assigned the task of creating the tool. They dropped everything to work on this project and began by using the existing MSHDA Application Server (MAPPS) database as the foundation of the Development Tracking Tool, so no new resources were necessary for the project and it allowed for a quick development environment. Within a month's time, a test version was completed and the live internal version was implemented at the end of August 2013. With further verification on the web portal, the system was officially launched to the developers November 20, 2013.

What is it?

The Development Tracking Tool is an effective online tracking system that tracks the status of MSHDA-financed multifamily projects within the loan process.

This system provides an efficient user interface for Housing Development Officers (HDOs) to input deal status information of projects and allow private developers and sponsors to view the status of the project through a web portal. All of the information is real-time and available as soon as it is entered into the system. The Development Tracking Tool also has been expanded to track received funds as well as modifications to the development throughout the pipeline process.

The Development Tracking Tool is also capable of sending automated emails as well as generating numerous reports on the fly. It also has the capabilities to easily grow and make alterations very quickly.

The Final Result

The goals from the Value Stream Assessment have been met by implementing the Development Tracking Tool. Developers and sponsors can easily log in and check the status of a property without having to call MSHDA. They can also see with specificity where the project is in the process as well as need for further documentation. We currently have 140 users, including sponsors, consultants, owners, management agents, supportive service providers, builders, accountants, architects and attorneys.

Summary

The implementation of the Development Tracking Tool has successfully streamlined MSHDA development projects to the delight of both MSHDA employees and developers alike. We have been commended for the development of this tool by the users because they can easily find what they need to know in a timely manner, it's easy to use, it saves time and it works great. Those are their words and a powerful testimonial for customer service through the use of technology!

This innovative system can be easily duplicated in other HFAs and has achieved the strategic objectives MSHDA set out initially to accomplish, both internally and externally. It is easily maintained with no future costs involved except for staff time, and that cost is vastly outweighed by the amount of time our staff is able to save in lengthy personal interaction to answer questions, make requests for documentation or to clarify status or progress.

Attachments

Property Identity

Property ID	MSHDA Number	LIHTC Number	Unique ID
65	3632		

Property Information

Property Name
LIBERTY POINTE

AKA

FKA

Street Address
2658 LIBERTY ROAD

PO Box/Suite Number

City	Zipcode	County	Phone
ANN ARBOR	48103	Washtenaw	

Property Notes

Property Map

2658 W Liberty Rd
View on Google Maps

2658 W Liberty Rd

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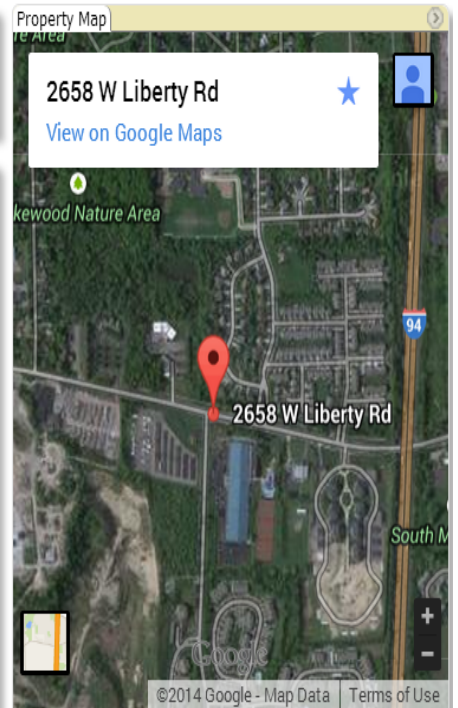
Contact List (9)

Count: 9 1 all

dt_pcn_ID	typ_Description	dt_con_name	dt_cmp_Name	dt_con_phone	dt_cmp_address
247	HDO	Kara Hart-Negrich	MSHDA	517-335-2273	735 E. Michigan Avenue
248	Sponsor	JEFFREY L KITTLE	HERMAN & KITTLE PROPERTIES INC	317-805-1980	500 E 96TH STREET, SUITE 3
249	Owner	JEFFREY L KITTLE	LIBERTY POINTE LDHA LP	317-805-1980	500 E 96TH STREET
250	Management Agent	STEVE LAVERY	HERMAN & KITTLE PROPERTIES INC	317-663-6880	500 E 96TH STREET, SUITE 3
251	Attorney	STEVEN RYPMA	HONIGMAN MILLER SCHWARZ & COHN	269-337-7842	350 EAST MICHIGAN AVENUE

Funding Information

Count:

prop_fund_ID	Property_ID	Funding

Development Tracking Tool Phase Input screen

| Menu | Main Menu | Property List | Back to Property | ⊙ Tracking | Save |

phase_ID	Property		MSHDA Number
72	⊙ HERITAGE LANE - 3638		3638

Last Modified ⊙
6/19/2014 8:47:07 AM

Application Date	Application Type	Assigned HDO	Pipeline_process_status
1/14/2014	⊙ 9% PSH Set Aside	⊙ Ryan Koenigsknecht	⊙ Combined Threshold/Comm

Preliminary Phase (1) | Threshold Phase (1) | Commitment Phase | Initial Closing Phase | Design Review ⊙

⊙ *SysAdmin* | Save | Delete

Tracking Dates ⊙

Threshold Start Date
6/9/2014

Threshold End Date

Legal Review Status ⊙

Date Docs Submitted

Date Complete/Cert Recd

Missing Documents
This deal was recently awarded 9% Tax Credits but will be getting gap financing from The Authority as it is a PSH deal. The developer is working on gathering all the necessary documents to submit for Threshold review.

Market Study Review Status ⊙

Date Ordered	Date Received	Date Complete/Cert Rec

Environmental Review Status ⊙

Date Phase I Recd	Environmental Concerns Identified	Date Complete/Cert Rec

CNA Review Status ⊙

CNA Req Triggered?	Date CNA Info Submitted	Date CNA Ordered	Date CNA Received	Analysis Meeting Date	Date CNA Finalized

Financial Statements Review Status ⊙

Date Recd Sponsor	Date Recd Builder	Date Sponsor Complete/Cert Rec	Date Builder Complete/Cert Rec

Architectural Plans and Specifications ⊙

Date Received	Date Complete/Cert Rec

Trade Payment Breakdown Status ⊙

TPB Received	Date Review Complete

Section 3 Plan Review Status ⊙

Triggered	Date Received	Date Complete/Cert Recd

Operating Budget Review Status ⊙

Date Received	Date Review Complete

Staff Report and Proforma Status ⊙

Proforma Review Complete	Staff Review Complete

Loan Committee Status ⊙

Loan Committee Date	Loan Committee Decision ⊙

Developer Web Portal View

Development Tracking

MSHDA — MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY
Investing in People.
Investing in Places.

Development Information

MSHDA Number	Property Name	Address	City
3490	Example Property	735 E. Michigan	Lansing

Application Date	Application Type	Assigned Housing Development Officer	Pipeline Status
1/1/2013	Tax Exempt Bond/NOFA	James Smith	Threshold

Preliminary Assessment Phase

Application Package

Date of Site Visit	Documents Submitted
1/1/2013	Complete

Missing Documents/Notes

Preliminary Market Study Status

Date Ordered	Date Received	Review Complete
1/1/2013	1/1/2013	1/1/2013

Loan Committee Status

Loan Committee Date	Loan Committee Decision
1/1/2013	Approved

Threshold Assessment Phase

Legal Review

Date Docs Submitted	Date Complete/Cert Recd
1/1/2013	

Missing Documents/Notes

Market Study Review

Date Ordered	Date Received
1/1/2013	

Date Complete/Cert Recd

Commitment Phase

Legal Review

Date Docs Submitted	Date Complete/Cert Recd

Missing Documents/Notes

Market Study Review

Pending Issues	Date Complete/Cert Recd
No	

Market Study Comments

Initial Closing Phase

Asset Management Review

Operating Agreements Recd

Operating Agreements Review Complete
Pending

URA Notice Review

Triggered	Proof URA Req Met
No	N/A

Date Review Complete
N/A

Draw Schedule Review