

## Washington State Web-Based Annual Reporting System

The Washington State Web-Based Annual Reporting System, or WBARS, is a comprehensive and innovative annual reporting, monitoring and asset management system shared by seven different public funders in Washington State. After many years of working closely together in a variety of capacities, funders believed a web-based reporting system was the logical next step of coordination to meet needs of clients and funders in today's electronic world.

### **Strategic Objective**

Our multiple objectives were to create a system that would reduce paperwork, improve accuracy of reports, meet the contractual needs of all participating funders, make our reviews easier by automatically calculating needed information, and provide a “carrot” to owners and managers that would make them excited about using the system. We succeeded on all objectives.

Funders already had a Monitoring Coordination Task Force (MCT) that met bi-monthly. The MCT group has spent years sharing resources, staff, and expertise to streamline and prevent duplication of effort, share information and maximize oversight leverage.

### **WBARS History – recipe for success**

1. **Cooperative Funders.** Our MCT group began meeting in 1999 and we signed our first Memorandum of Understanding (MOU) between the City of Seattle and the Washington State Housing Finance Commission (WSHFC) in 2000. Other MOUs followed in subsequent years with the State Department of Commerce and City of Tacoma. Informal agreements were made with King and Snohomish Counties, City and County of Spokane, Seattle Housing Authority, Federal Home Loan Bank, USDA Rural Development and the Regional HUD office. These working agreements allow us to share reports, on-site inspections, asset management oversight, ownership and management transfer information, and jointly invest in property funding and project workouts.
2. **Coordination with Property Management Groups.** WSHFC has maintained Board membership and participation with our state AHMA and CARH affordable housing management associations. We believe buy-in from management groups has been key to our success in this effort.
3. **Joint Trainings.** Annually, public funders conduct joint annual report training sessions for owners and managers. WSHFC also participates in AHMA and CARH trainings and annual conferences. Conducting joint trainings requires instructors from each agency to thoroughly understand how their requirements overlap or supplement those of their partner agencies.

4. **Baseline agreements.** With a baseline cooperative group of seven funders, we began discussing the potential benefits of automating our joint Excel Annual Reporting Forms to a more usable and automated system as early as 2004. In mid-2007, WSHFC began discussions with the Washington State Department of Commerce (Commerce) on a jointly-funded project to develop a web-based system.
5. **Overall goal to benefit all users.** From the beginning, the goal was to create a system that would benefit all joint funders, property management staff, and owners as well. Selling a system to Property Managers that they could see would benefit them was key to gaining buy-in. Scoping included a series of separate meetings at various levels. Separate meetings were conducted with Funder Staff; Funder IT Staff; Property Management Staff; and Property Management Software company representatives.
6. **Limited number of decision makers.** Two WSHFC and two Commerce staff met with a contractor in a series of design meetings. Major design decisions were approved jointly by WSHFC and Commerce. Day-to-day decisions were made by WSHFC. Commerce was kept up to date on all design changes and other funders were kept up to date on major decisions and developments. Having one primary staff person at WSHFC, able to make all final decisions, was another key to our success.
7. **Funding commitment.** Two agencies funded WBARS. Commerce used MacArthur Foundation Grant funds for most of their portion of development, while WSHFC used agency funds.

WBARS was designed in early 2008, and developed in 2008 and early 2009. It was released to owners and managers in June, 2009. First reports were due to WSHFC on January 31, 2010, with subsequent reports due to other funders on June 30, 2010. To date, over 1400 properties have successfully reported using the system.

### **What has WBARS Accomplished?**

- Over 1480 properties with 85,000 units are now in the system.
- Holds information on 670 Organizations with 1600 contacts. Users update their own contact emails, phone and staff – no need for clients to update each funder.
- Seven public funders have projects in the system including WSHFC, Commerce, City of Seattle, City of Tacoma, King and Snohomish Counties and City of Spokane. Funders enter their individual contractual requirements by property.
- Allows for manual entry or upload via current property management systems. National vendors currently uploading information include: Boston Post, Yardi, E-site, Real Page, and Hi Tech Solutions.

- Contains four comprehensive annual reports:
  - Table 1 – rent roll with max and actual incomes, rents, subsidies, utilities, set-aside limits and WSHFC special-needs categories. Includes three sets of Income Limits for Tax Credits, HOME and Section 8.
  - Table 2 and 3: Demographics – including race, ethnicity, and disability status; HOME report info and other funder special-needs categories.
  - Table 4: Property income, expenses, reserves, and performance indicators such as Property Turnover Rate, Occupancy Rate, and Cash Flow.


### **How has WBARS improved operations?**

1. Eliminates paperwork. Previous Excel reports ranged from 10 to 20 pages for each of the 1480 properties now in the system. For any projects with more than one funder, separate reports were sent to each – multiplying the number of additional reports.
2. Keeps 1600 contacts up to date. This was a monumental task for funders.
3. Meets the most restrictive requirements of each funder and solves any questions on overlap of similar requirements.
4. Greatly improves accuracy of reports.
5. Allows Property Managers, who have their own software system, to simply upload to ours – preventing the need for them to create and submit a separate report.
6. Allows Owners and Managers to see, at any time, whether they are in compliance with any and all funders in the system.
7. Allows WSHFC to easily compile information needed to report annually to HUD on Demographics, Rents, Incomes, and Subsidies by electronically uploading to HUD's system.
8. Allows staff to speed-up administrative reviews for basic compliance information on income and rent set-asides (calculates how many units are leased at each set-aside level for all funders). Staff can focus on the more important audit functions.
9. Provides valuable Asset Management Property Information that can be viewed by all funders, including information on Property Income, Expenses, Reserves, Debt Service and Performance Indicators – speeding up financial reviews.
10. Improves funder coordination efforts and cuts down on countless phone calls and emails to verify and compare information.
11. Offers a myriad of report functions to satisfy needs of each funder.

### **Could the system be replicated?**

We think so. Parts or all of our system could work in any state where funders want to streamline reporting, share information, and assist owners and managers. We have already had inquiries from several states.

**TRY IT:** Login codes on next page 



# COMBINED FUNDERS' ANNUAL REPORTING SYSTEM

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Validation Status	Report Status

## Welcome

Welcome to the Combined Funders Web Based Annual Reporting System (WBARS). WBARS allows public funders, property owners and property managers to input project data year-round and to share information related to compliance and asset management.

For more information about how to use WBARS as well as current training opportunities, please go to <http://www.wshfc.org/managers/wbars.htm>



WASHINGTON STATE  
HOUSING FINANCE  
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*Opening doors to a better life*




Seattle Office of  
HOUSING



Department of Commerce

*Innovation is in our nature.*



King County



Tacoma



Snohomish  
County



# **LOG INTO THE WBARS SYSTEM AND TRY IT OUT!**

## **Access to Demonstration Web Site**

URL: <https://www.testwbars.com>

### **WBAR Test Logins**

Username: DemoFunder

Password: !TestPass39\*

Username: DemoOwner

Password: !TestPass39\*

Username: DemoPropertyManager

Password: !TestPass39\*

Username: DemoOnSiteManager

Password: !TestPass39\*



# COMBINED FUNDERS' ANNUAL REPORTING SYSTEM

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## Project Summary Report - 2010

### 1811 Eastlake Supportive Housing - 75 Total Units in 1 Building

#### Expand All Bedrooms

	WSHFC	Commerce	SOH	KC	Occupied as of 12/31/2010
1. Total units in the project:	75	75	75	75	75
2. Total low-income units set-aside:	49	75	75	75	74
<input checked="" type="checkbox"/> 30%	25	75	75	75	74
<input checked="" type="checkbox"/> 40%	13	0	0	0	0
<input checked="" type="checkbox"/> 60%	11	0	0	0	0
3. Total Common Area units set-aside (Resident Managers, Maintenance, or Security Personnel)					0
4. Total Market-Rate Units:					0
5. Total units vacant or empty as of 12/31/2010:					1
6. Total WSHFC Special-Needs units:	20				
<input checked="" type="checkbox"/> Disabled	10				74
<input checked="" type="checkbox"/> Homeless	10				74
7. Total Special-Needs Population:		50	75	75	97
Substance Abusers / In Recovery		50	75	75	97
8. Special-Needs Population - Homeless:		15	75	75	97
Homeless Family Head of Household Served		15	0	0	0
Homeless Individual Head of Household Served		0	75	75	97
9. Home Program:			11		11
<input checked="" type="checkbox"/> HOME Program - City			11		11
10. Is an elderly project:	No	No	No	No	

## Site Summary Report - 2010

### 1811 Eastlake Supportive Housing - 75 Total Units in 1 Building

#### Expand All Bedrooms

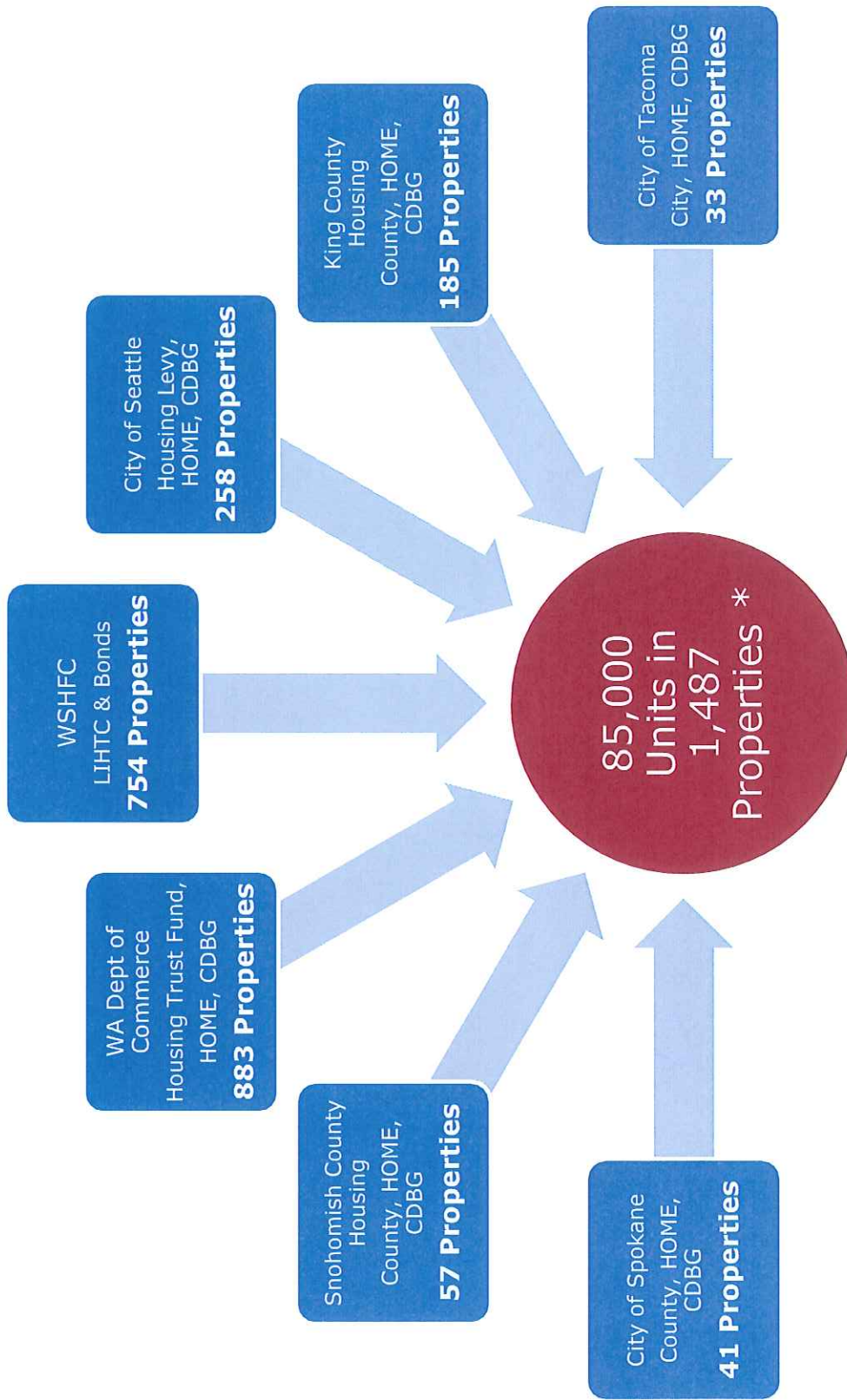
	WSHFC	Commerce	SOH	KC	Occupied as of 12/31/2010
1. Total units in the site:	75	75	75	75	75
2. Total low-income units set-aside:			75		74
<input checked="" type="checkbox"/> 30%			75		74
3. Total Common Area units set-aside (Resident Managers, Maintenance, or Security Personnel)					0
4. Total Market-Rate Units:					0
5. Total units vacant or empty as of 12/31/2010:					1
6. Total WSHFC Special-Needs units:					
<input checked="" type="checkbox"/> Disabled					74
<input checked="" type="checkbox"/> Homeless					74
7. Total Special-Needs Population:			75		97
Substance Abusers / In Recovery			75		97
8. Special Special-Needs - Homeless:			75		97
Homeless Individual Head of Household Served			75		97
9. Home Program:			11		11
<input checked="" type="checkbox"/> HOME Program - City			11		11
10. Is an elderly project:	No	No	No	No	

## Page Notes

### Annual Report Summary Page

Purpose of the Annual Report Summary Page is to see a high level view of the compliance of a Project. The information displayed derives from both

## Funder Properties in WBARS



\* 1,487 properties encompassing 85,000 units in WBARS. Half of the properties were financed with Low Income Housing Tax Credits. Another 700 properties in the system have no Tax Credits and were financed with other sources such as city, county and state funders.