

Category: Management Innovation, Operations

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 eight 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. 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. The group shares efforts in the following areas: Joint On-Site Inspections, Standardized Reporting Forms, Asset Management Oversight, Project Changes and Workouts, Transfers of Ownership, Management Changes, Project Contractual Changes and Joint Training Workshops.

WBARS History

Funders began discussing the potential benefits of automating their Excel Annual Reporting Forms to a more usable and automated system as early as 2004. In mid-2007, WSHFC began discussions with Washington State Department of Commerce (Commerce) on a jointly funded project to develop a web-based system. WSHFC would act as the lead on this project.

From the beginning, the goal was to create a system that would benefit all joint funders and 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.

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 at 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.

The project 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, nearly 1300 properties have successfully reported using the system.

What has WBARS Accomplished?

- Over 1400 properties with approximately 100,000 units are now in the system.
- 1200 owner and manager contact numbers and emails are in WBARS. These are updated by the managers themselves as on-site and property management staff change frequently.
- Eight public funders are participating: WSHFC, Commerce, City of Seattle, City of Tacoma, King and Snohomish County, Spokane County and City of Spokane. Funders enter their individual contractual requirements by property.
- Properties enter information manually or via upload from current property management systems. National vendors currently uploading info include Boston Post, Yardi, E-site, Real Page, and Hi Tech Solutions.
- The System has four current annual reports:
 - Table 1 – comprehensive rent roll with incomes, rents, subsidies, utilities, set-aside limits and special needs categories.
 - Table 2 and 3: Demographics – including race, ethnicity and disability status.
 - Table 4: Property income, expenses and reserves and performance indicators such as Project Turnover Rate, Gross Rent Potential and Occupancy Rate.

WBARS represents a significant financial investment for WSHFC and Commerce but we believe it was a good investment and is a significant achievement. We believe the benefits far outweigh the costs.

- WBARS **should save money** for both funders and owners/managers while delivering much better, cleaner, and more accurate data. From a **funder review standpoint**, WBARS calculates many functions that staff historically had to hand count. And it prevents managers from making many of the errors that were possible in Excel spreadsheet reports, preventing the need for lots of back and forth correspondence between funder staff and management. This allows funder staff to focus our efforts on more important audit functions that computers can't do.
- From a **management perspective**, it provides a great tool that should save time and money. It allows unsophisticated users to enter directly into the system and keep historical data that doesn't need to be entered year after year. It allows users with various software systems to work throughout the year in their own system and then upload via XML feed. It allows both types of users **Real Time Compliance** where they can instantly see whether projects are in compliance with **any and all** funders that participate in WBARS. And of course WBARS allows owners to report to one place, regardless of whether they have one source or six on a project.

- **Future possibilities** for system enhancements include multiple reporting and asset management functions that could be used by funders and owners/managers overseeing current portfolio and to meet a variety of needs including sub-market analysis of need/performance issues. Elected officials will also benefit from comprehensive statistical reports in our continuing efforts for more funding towards affordable housing.

Lessons learned along the way

1. Decision makers need to be present at all Combined Funder meetings or at least most of the meetings.
2. Form subcommittees of professional staff, non-management types, that can speak freely peer to peer and bring recommendations to the larger group.
3. Consensus building is essential, but at some point, funders with the biggest portfolio need to determine what will work best for the majority of clients. For instance, you can't build a reporting system that handles Group Homes or Shelters well but not Elderly, Family or Homeless housing. There will always be odd projects that don't fit the mold and need to be handled independently.
4. The details are important. Sometimes the smallest issues can become the biggest dividers. So, find a way to accommodate those group homes and shelters and that one funder who has those weird requirements.
5. Get outside input early. Form focus groups that represent all of your clients.
6. Participate in state AHMA and CARH groups/board meetings – keep them informed of possible changes coming. They can be a key ally.
7. Agree on two or three key senior decision-makers to have final say on changes that will benefit the group. Always keep the larger group informed and attempt to get buy-in prior to finalizing, if possible.
8. Remain flexible – back up and modify when necessary.

Could the system be replicated?

We think so. This 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 and are in the process of further discussions on implementation with one state.