

A teal line-art illustration of a lantern on a pedestal. The lantern has a glowing orange flame inside. The pedestal is white and tapers to a point. The background is a solid green color.

# 2019 Boston

ANNUAL CONFERENCE  
& SHOWPLACE

## Visualizing Success: CHFA's Executive Dashboard

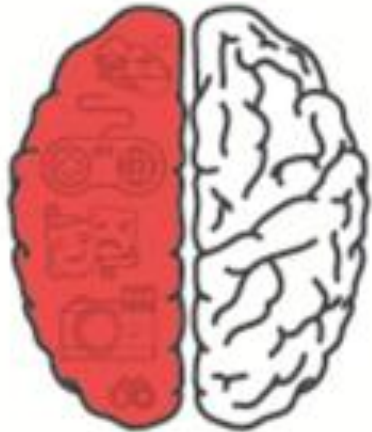
Thomas Bryan

Jonathan Sakanai



# The business case for visualization

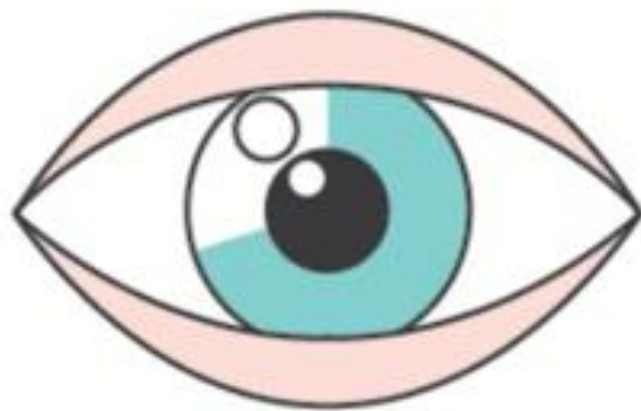
1



ALMOST  
**50%**

of your brain is involved  
in **visual processing**

2



**70%**

of all your **sensory**  
**receptors** are in your eyes

3



**1/10**  
OF A SECOND

is all it takes you to  
understand a **visual scene**

# The business case for visualization

4

Actually, it only takes us

**150ms**  
to process a symbol



and **100ms**  
to attach a meaning to it

1ms

1second

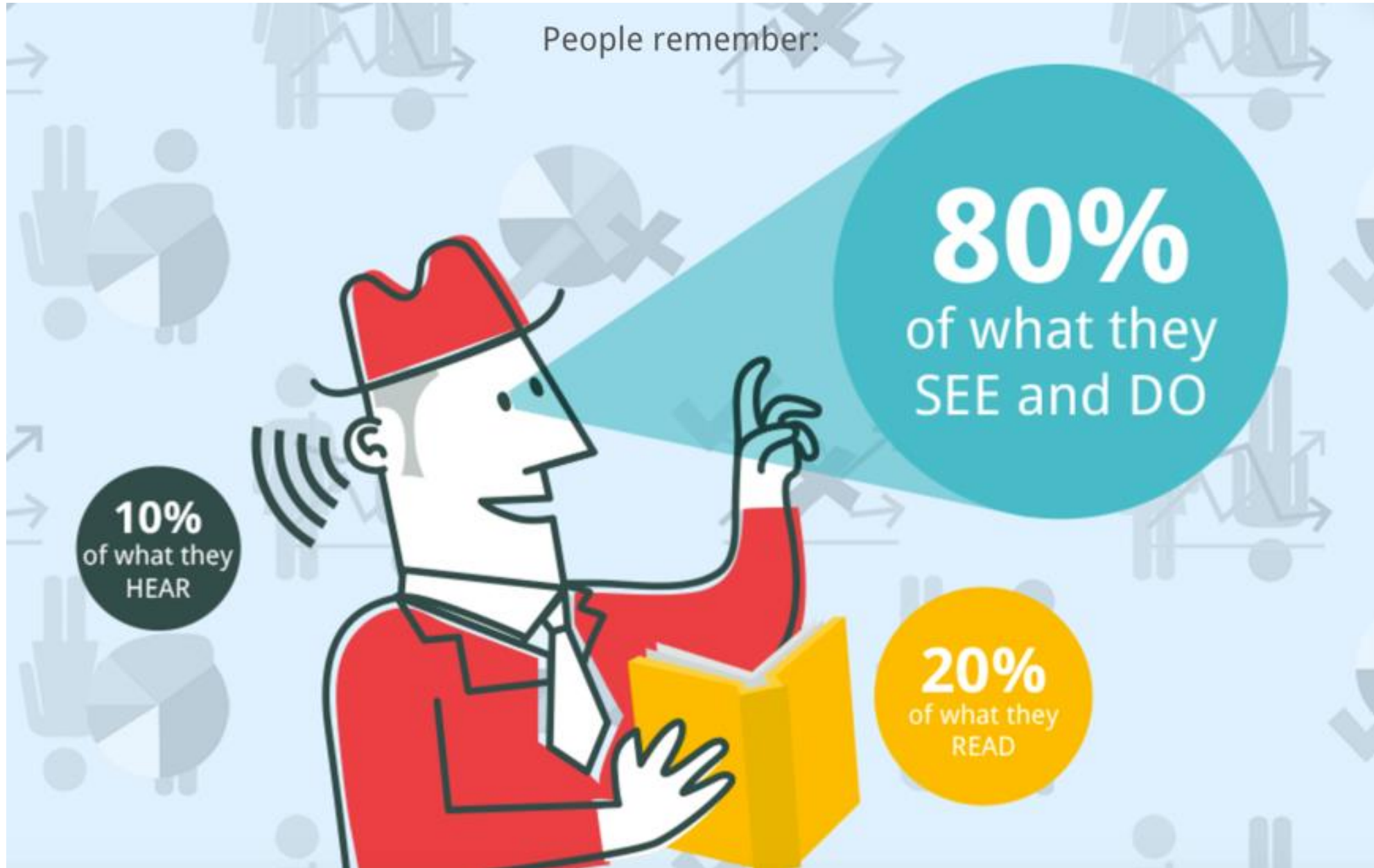


**EXAMPLE:**



**VS**

While you are travelling down this road there is a chance that one or more rocks of a varying size may fall from the slopes on one or both sides of you. You should be aware of this before you travel this way so that you are cautious of this particular type of hazard.



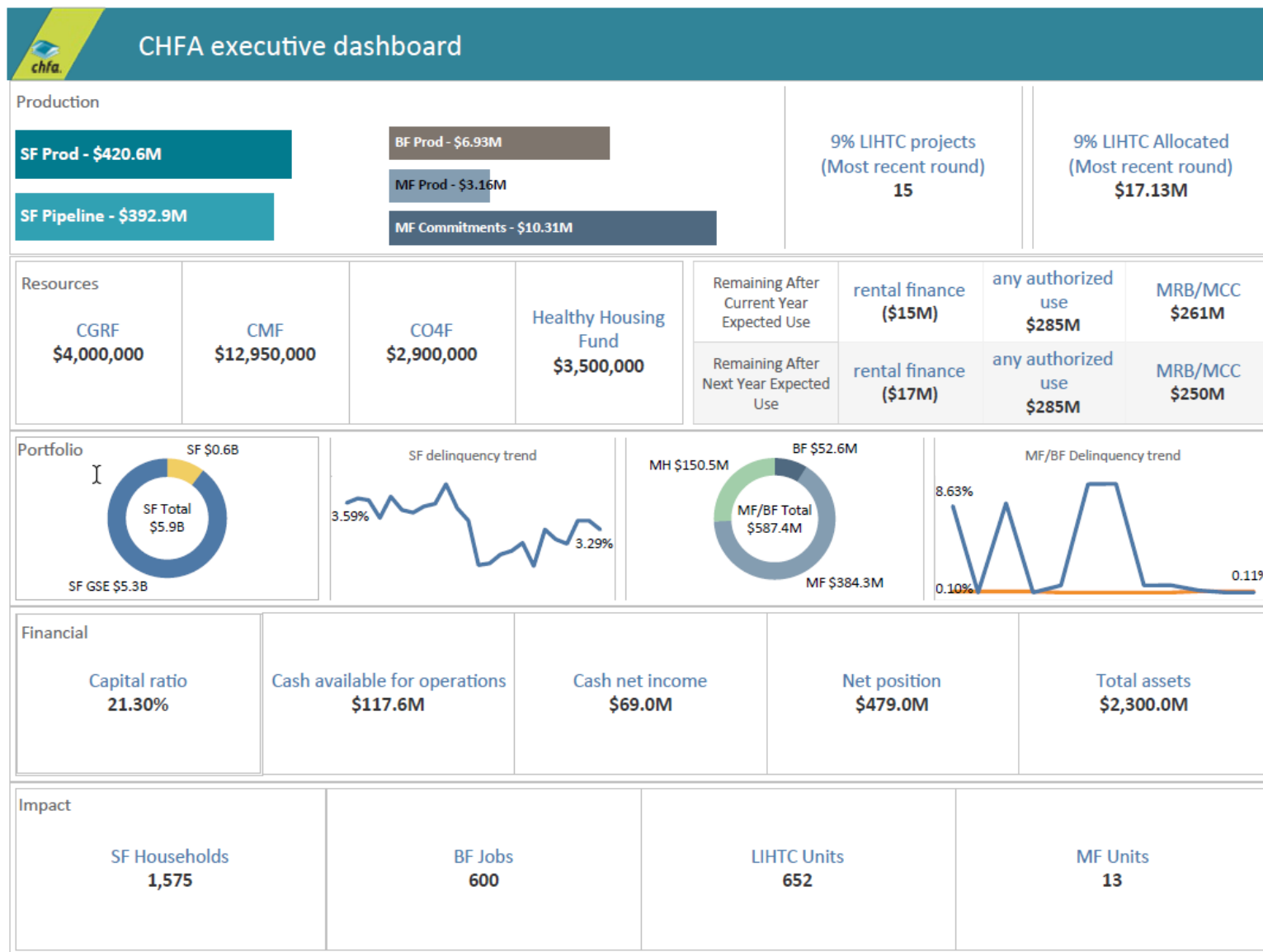
# CHFA's path to visualization

- In 2015, CHFA invested in technology tools to modernize data warehouses and reporting
- 14 source systems
- ~ 300 legacy reports
  - Logic could vary for each report
  - Download and manually analyze in Excel
- Desire grew for faster, agile analytics

# How do we use the new tools?

- New data warehouses allowed for easier, faster analytics and visualizations
- Interactive dashboard use took off at CHFA
  - First with specific users and groups, then eventually more widespread
  - Difficult for users to remember where each dashboard lived
- How do we organize and present all of this data to make meaningful decisions for the organization?

# First Draft





Navigation: Executive Summary | SF Production | BF Production | MF Production | SF Portfolio | BF Portfolio | MF Portfolio | Financial | SF Impact | BF Impa

### executive dashboard

<p>\$2.0B SF Production YTD</p> <p>\$209.8M MF Production YTD</p> <p>\$47.2M BF Production YTD</p> <p>production</p>	<p>\$117.6M Cash available for operations</p> <p>financial</p>	<p>\$6.8B Unpaid SF Principal Balance</p> <p>\$412.6M Unpaid MF Principal Balance</p> <p>\$46.1M Unpaid BF Principal Balance</p> <p>portfolio</p>
<p>\$54.8M Available Resources</p> <p>resources</p>	<p>7,435 SF Household Count YTD</p> <p>1,780 Tax Credit Units YTD</p> <p>3,556 BF Jobs YTD</p> <p>impact</p>	<p>349.5 Life of Loan NPV bps</p> <p>profitability</p>

kp dashboard | divisional dashboards | profitability dashboard | pab dashboard



## profitability line item drill in

Business Unit	Allocation Type	Account	Account Category	Allocated From	Allocation calendar date		
					2016	Revenue	Expense
		7109	Loan Closing Cost	CD - Brownfields RLF	50	(\$318)	\$318
				CD - Business Finance	50	(\$181)	\$181
			Loan Closing Fees	CD - Business Finance	50	(\$47)	\$47
		7258	Supplies	CD - Business Finance	50	\$1	(\$1)
		7262	Telecom	CD - Business Finance	50	(\$2)	\$2
				Community Developme..	50	(\$8)	\$8
		7267	Computer System Licenses & Mai..	CD - Business Finance	50	\$1,168	(\$1,168)
		7732	Staff Events	Community Developme..	50	\$142	(\$142)
		9201.9399	Travel & Training	CD - Business Finance	50	\$729	(\$729)
				Community Developme..	50	\$1,347	(\$1,347)
	Cost Center Direct	7000.7035	Salaries & Benefits	Accounting	50	\$5,512	(\$5,512)
				IRM	50	\$502	(\$502)
				IT	50	\$1,004	(\$1,004)
				Legal Svc	50	\$15,225	(\$15,225)
				LRM Compliance	50	\$299	(\$299)
				Research and Strategy D..	50	\$3,743	(\$3,743)
		7102	Legal	Legal Svc	50	\$148	(\$148)
		7104	Consulting / Contractor	IRM	50	\$181	(\$181)
		7105	Consulting / Contractor	IRM	50	\$0	\$0



**555.6**

TBA Premium bps

**-93.2**

Cash Through Securitization bps

**342.8**

Life of Loan NPV bps

**311.6**

Weighted Avg PSA

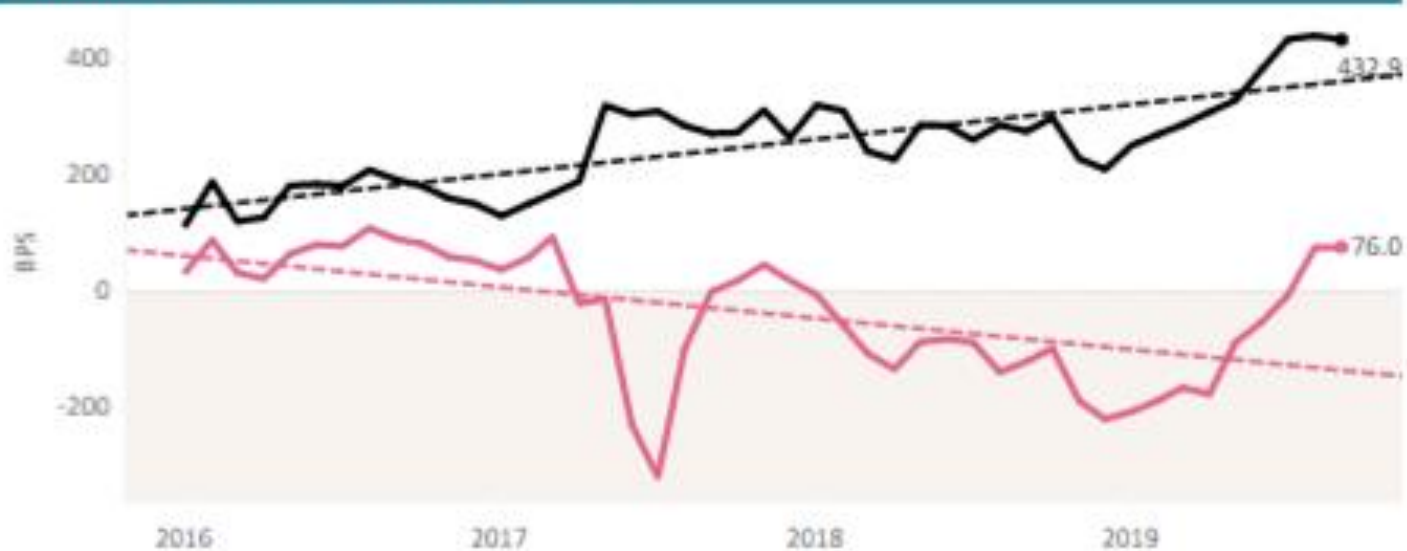
**34.2**

Weighted Net Service Fee To CHFA bps

## single family profitability ytd



### Securitized Flow Profit by Purchase Month



### Period(s) Avg Prepayment Speed

480

Budget Or Actual

Actual

- Cash Through Securitization bps
- Life of Loan NPV bps