

NCSHA 2016 Annual Awards Entry Form

(Complete one form for each entry)

Deadline: Wednesday, June 15, 2016

Visit ncsha.org/awards to view the Annual Awards Call for Entries.

Instructions: Type entry information into the form and save it as a PDF. Do not write on or scan the form. If you have any questions contact awards@ncsha.org or 202-624-7710.

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

Entry Name: _____

HFA: _____

Submission Contact: (Must be HFA Staff Member) _____ **Email:** _____

Please provide a 15-word (maximum) description of your nomination to appear on the NCSHA website.

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

HFA: _____

Entry Name: _____

Select the appropriate subcategory of your entry and indicate if you are providing visual aids.

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

Iowa Finance Authority

An Operational Transformation Leading to 100% Awareness

The Challenge

It would be a safe assumption to presume that nearly every housing finance agency (HFAs) at one time or another has been challenged with defining a single vision for its agency, and with it a sole strategic goal that the entire agency can rally around.

A point of pride amongst HFAs is our ability to adapt and take on programs to meet current needs. Over time, this strength can become a challenge, as the new programs and initiatives may not fit neatly into the founding mission statement that once worked so well.

We found ourselves holding many meetings to set strategic goals for each department. The goals that resulted from these meetings, while pertinent to the department at the time, often did not have a universal view of the agency and actually resulted in stronger silos between departments as each area was driving in their own direction to meet their goals that may or may not align with other department's goals.

The Solution:

In the fall of 2014 we set out to find a strategic planning method that would help us address our unique needs and help us create agency-wide goals that would be meaningful and measurable to each department, while keeping everyone accountable for their role in reaching them.

We researched several planning systems, but one stood out as an innovative solution that could be the change we needed: the Entrepreneurial Operating System® (EOS).

When we initially signed on for EOS, no one truly knew the adventure we were about to embark on was about to change our culture. While the system did help us realign our mission statement and set meaningful agency-wide goals – it also forced us to think about our agency in a different way and resulted in significant positive changes.

The EOS process has helped us to get every department on the same page, crystalize our vision, gain more traction to execute that vision and become a healthy and cohesive team.

Structure

The EOS Process is based around a regimented schedule.

- Quarterly off-site meetings: Each IFA department has a quarterly meeting to check the status of last quarter's rocks, set new ones that align with the leadership team's rocks for the quarter and solve remaining issues.
- Annual Planning meeting: The leadership team has a two-day annual meeting to check-in on accountability, EOS toolbox tools and the health of team and organization.
- Weekly L10 Meetings: Each IFA team has a weekly meeting to check in on to-do items, rock progress, discuss and solve issues and realign around the Agency's goal and mission.

Iowa Finance Authority

An Operational Transformation Leading to 100% Awareness

Results

IFA has successfully developed and integrated the following:

- **Accountability chart**

The accountability chart is similar to an organization chart, but includes major functions for each seat and only one person can be accountable for those functions. We had to decide the right structure that reduces complexity and creates clarity; all while considering the structure first and the specific people that will fill these roles second. The IFA accountability chart resulted in us seeing the need to shift some departments into other areas as well as create a new key position. These changes helped to create clarity in roles and encourage accountability.
- **Core Focus:**

Refreshed our core focus to include the core of what all of our programs share, no matter their audience: *“Enhance the quality of life for Iowans by making affordable financing possible for home and community.”*
- **Core values:**

We adopted new core values that are reflective of our current culture and what is expected of every IFA employee. These core values are actively used in resume review, interviewing, annual performance reviews and recognition. A core value key is used during performance reviews, if any staff member received a “minus” on any one or more core values, further action and coaching is taken.
- **Rocks**

Each IFA staff has between one and five rocks per quarter. These are goals that in some way support the overall agency 10-year target, 3-year picture and 1-year plan. All rocks must be specific, measurable, achievable, realistic and timely.
- **Meeting Format:**

Each IFA department now holds weekly “L10” meetings. The meetings are called L10s because each meeting starts off as a “10” and it is everyone’s responsibility in the meeting to speak-up if they feel the meeting has gotten off-track. At the conclusion of each meeting, everyone rates the meeting.
- **Scorecard**

The scorecard gives us a pulse of what is happening in each department. Each department has a scorecard with weekly, measurable goals. It includes 5-15 numbers and only one person can be accountable for each scorecard item. Scorecard items vary from business development contact hours to loan volume amounts.
- **Marketing Strategy**

While we had marketing plans for each department, the EOS process has a defined and simplified “Marketing Strategy” to complete for each that includes: 1: Target Market 2: Three Uniques 3: Proven Process 4: Guarantee

Iowa Finance Authority
An Operational Transformation Leading to 100% Awareness

- 10 Year Goal: 100% name awareness by 2025.**
 When we began our EOS journey, our goal was to have a meaningful strategic plan that every staff member could rally around, contribute to and tell you what the goal was when asked. We've accomplished that with our goal. **The 10-year goal of 100% name awareness by the year 2025** goes far beyond marketing dollars; the aim is to increase the number of lowans we can assist, simply because they know we exist and may be able to help them.
- 10-Year Goal Baseline**
 In order to know where we're going and set a plan of action to get there, we first must have a baseline of awareness to measure our efforts against. **Our research shows that 17% of lowans have heard the name "Iowa Finance Authority".**

Heard the name "Iowa Finance Authority"	Iowa Residents (519 surveys)	Government Agencies (198 surveys)	Influencers (197 surveys)
Yes	86 (17%)	163 (82%)	189 (96%)
No	433 (83%)	35 (18%)	8 (4%)

- Research:**
 Baseline: (June 2015)
 - Assess current brand awareness
 - Follow-up Research: (June 2017)
 - Assess progress towards 37% goal
 - Additional Research every two years
 - Determine effectiveness/tweaks to plan
- Awareness Plan**
 The research conducted also gave us a snapshot of the awareness levels of each of our program areas. Using this information, we were able to compile an awareness plan for both agency-wide initiatives as well as targeted marketing for each program with measurable goals.

The 3-year picture and 1-year plan both take actionable sized goals that will help us get where we need to be within ten years. Both plans have lists of goals that need to be completed in order for our internal processes and programs to be flowing smoothly as program usage gradually increases due to increased awareness efforts as we work towards obtaining the 10-year goal of 100% name awareness.
- 3-Year Picture:**
 Measureables:
 - Name Awareness: 57%
 - Iowa Title Guaranty market share increased by 10%
- 1-Year Plan:**
 Measureables:
 - Name Awareness: 37%
 - Right Person/Right Seat: 90%

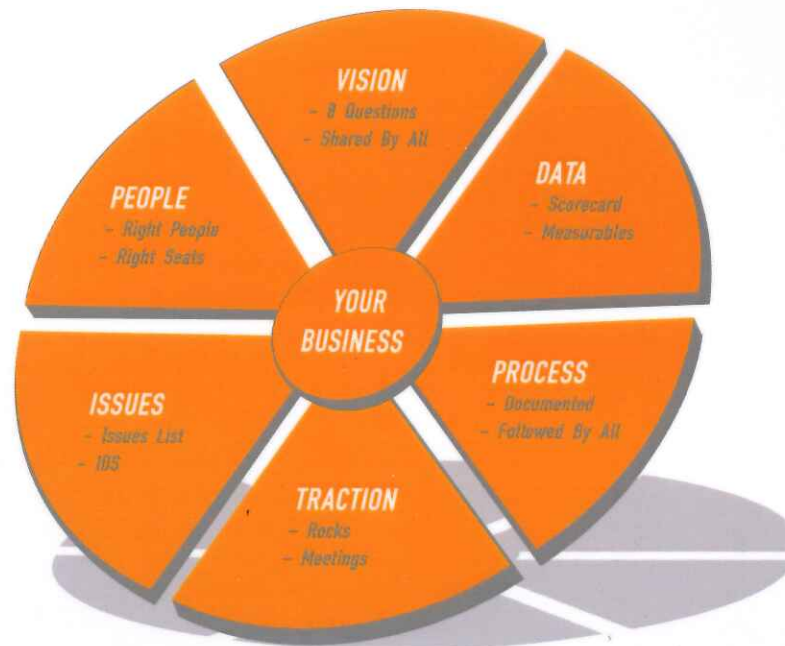
Helping organizations clarify, simplify and achieve their vision

WE HELP LEADERSHIP TEAMS OF ENTREPRENEURIAL ORGANIZATIONS

- Get on the same page and crystallize their VISION.
- Gain more TRACTION and execute on that vision.
- Become a more HEALTHY and cohesive team.

SIMPLE, PRACTICAL APPROACH

- A unique combination of teaching, facilitating and coaching.
- No theory, no magic pills, no flavor of the month. Just timeless principles that make organizations great.
- Over 1,000 full-day sessions with Leadership Teams.



"Applying The EOS principles has helped us achieve extraordinary results - last year we doubled revenue and tripled profits! Even better, our entire organization is aligned with our goals and vision - with powerful results."

Marc Schechter, Schechter Wealth Strategies

"After our work with The EOS Process, we are a very different company. We have a more effective and mature Executive Committee team. These simple techniques have played a key role in our changes."

Albert Berriz, McKinley

"Our vision is clearer and now we plan more strategically and really use The EOS problem solving techniques. We've met 89% of our rocks for eight quarters - and had 49% growth in 3 years!"

Curt Rager, Autumn Associates

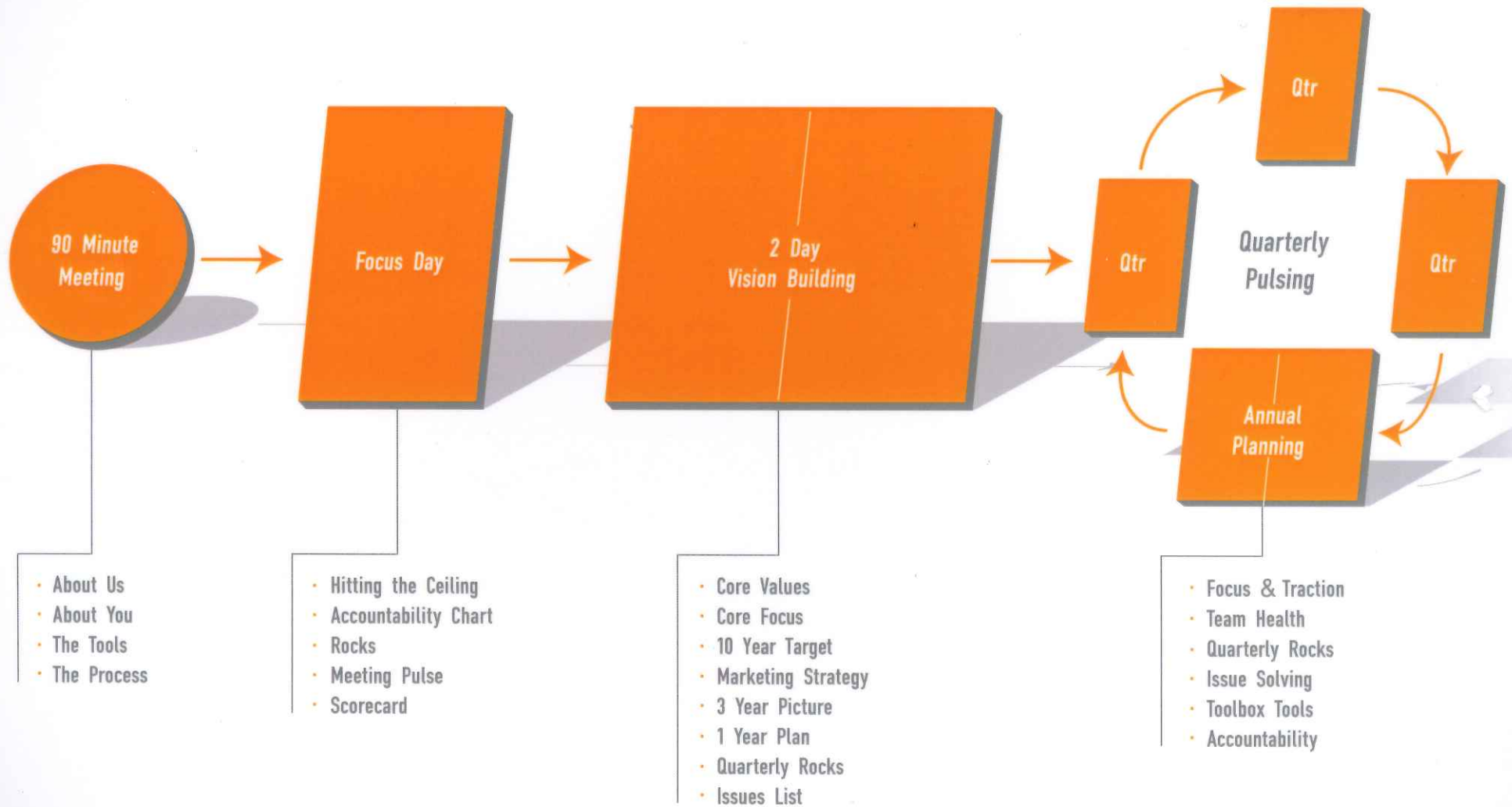
"We have fully implemented the EOS Tools throughout the organization. These tools have been instrumental in assuring individual and departmental accountability. Over the last year revenue is up 47% and profits are up even more than that. I cannot say enough good things about what you have done to help our company and to make it fun again."

Bernie Ronnisch, Ronnisch Construction

"Your help with Asphalt Specialists Inc. has proved to be invaluable. Your EOS Model and your V/TO are business tools that are both practical and user friendly. They have taken ASI to a new level."

Bruce Israel and Dan Israel, ASI Paving

THE EOS PROCESS™



Core Focus

- ▼ **PURPOSE:**

Enhance the quality of life for Iowans

- ▼ **CORE FOCUS:**

Making affordable financing possible for home and community.

Core Values

Integrity - Our employees, partners and customers can count on IFA to be honest and trustworthy

Mission Oriented - We keep a constant focus on the lowans our programs benefit

Purposeful Work Ethic - We nurture a culture of outstanding work ethic, teamwork and diligence

Accountability – We accept responsibility and honor our commitments

Customer Service Focus – We are courteous, responsive and respectful

Trusted Resource – We are a reliable resource for lowans

10-Year Target

**100% awareness amongst lowans by
2025.**

3-Year Picture

- ▼ Future Date: 6/30/19
- ▼ Measureables:
 - Name Awareness: 57%
 - ITG market share increased by 10%

3-Year Picture

What Does it Look Like?

- ✓ Customer and employee feedback system in place
- ✓ Improve employee engagement
- ✓ Sustained marketing strategy for each business unit
- ✓ Adequate workspace for all employees
- ✓ All policies and procedures, documented, understood, followed
- ✓ Software in place supporting agency needs
- ✓ EOS implemented throughout agency
 - ✓ 80% in Organizational Check-Up)

3-Year Picture

What Does it Look Like? (Continued)

- ✓ Ensure Right Person Right Seat (95%)
- ✓ Streamlined process for single-family department
- ✓ Increase multifamily lending
- ✓ Data security program ongoing
- ✓ Performance reviews completed annually for all employees
- ✓ Secure, stable IT support
- ✓ Full service HR department
- ✓ Automated customer experience surveys
- ✓ 100% paperless environment



1-Year Plan

- ✦ Future Date: 6/30/17
- ✦ Measureables:
 - Name awareness growth: 37%
 - Right Person/Right Seat: 90%

1-Year Plan

6/30/17

- ✓ HR department reorg. complete, duties defined, HR Plan operational
- ✓ Data security plan: 100% assessment, deficiencies addressed
- ✓ Employee engagement survey complete: Results received, plan to improve created
- ✓ ID processes to document: Additional 1/3 completed
- ✓ Facilities decision made
- ✓ Customer and employee feedback system implemented
- ✓ EOS basic tools implemented for each L10 team

10-Year Target

**100% awareness amongst lowans by
2025**

How do we get there?

Driven By Data

Baseline Research: (June 2015)

- Assess current brand awareness

Follow-up Research: (June 2017)

- Assess progress towards goal of 20% increase

Additional Research every two years

- Determine effectiveness/tweaks to plan

Results

Have you heard the name Iowa Finance Authority?

Heard the name IFA	Iowa residents (519 surveys)	Government (198 surveys)	Influencers (197 surveys)
Yes	86 (17%)	163 (82%)	189 (96%)
No	433 (83%)	35 (18%)	8 (4%)

Goal/Marketing Strategies

Agency-Wide

Familiar (Very/somewhat)	Total (715)	6/2017 Goal	Strategies
Familiar (Very/somewhat)	17%	37%	<ul style="list-style-type: none">• Search engine optimization• Events• Media Leg. Relations• Empowering advocates

Goal/Marketing Strategies

Homeownership Mortgage Programs

Familiar (Very/somewhat)	Total (715)	6/2017 Goal	Strategies
Familiar (Very/somewhat)	12%	32%	<ul style="list-style-type: none">• Summer campaign• Leverage partnerships• Home Buyer landing page

Goal/Marketing Strategies

Iowa Title Guaranty

Familiar (Very/somewhat)	Total (915)	June 2017 Goal	Strategies
Familiar (Very/somewhat)	8%	28%	<ul style="list-style-type: none">• Leverage partnerships• CE course for attorneys• Home buyer resources

Goal/Marketing Strategies

Housing Tax Credit Program

Familiar (Very/somewhat)	Total (222)	6/2017 Goal	Strategies
Familiar (Very/somewhat)	9%	29%	<ul style="list-style-type: none">Agency-wide strategies

Goal/Marketing Strategies

HOME Program

Familiar (Very/somewhat)	Total (222)	June 2017 Goal	Strategies
Familiar (Very/somewhat)	5%	25%	<ul style="list-style-type: none">Agency-wide strategies



Goal/Marketing Strategies

Project-Based Section 8 Program

Familiar (Very/somewhat)	Total (222)	June 2017 Goal	Strategies
Familiar (Very/somewhat)	10%	30%	<ul style="list-style-type: none">Agency-wide strategies

Goal/Marketing Strategies

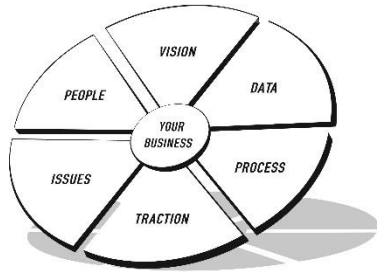
State Housing Trust Fund

Familiar (Very/somewhat)	Total (222)	June 2017 Goal	Strategies
Familiar (Very/somewhat)	7%	27%	<ul style="list-style-type: none">Agency-wide strategies

Goal/Marketing Strategies

Homelessness Programs

Familiar (Very/somewhat)	Total (220)	June 2017 Goal	Strategies
Familiar (Very/somewhat)	7%	27%	<ul style="list-style-type: none">Agency-wide strategies

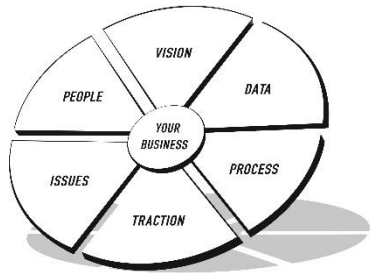


THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: Iowa Finance Authority

VISION

<p>CORE VALUES</p>	<ol style="list-style-type: none"> 1. Integrity – our employees, partners and customers can count on IFA to be honest and trustworthy 2. Mission Oriented – We keep a constant focus on the lowans our programs benefit 3. Purposeful Work Ethic – We nurture a culture of outstanding teamwork and diligence 4. Accountability – We accept responsibility and honor our commitments 5. Customer Service Focus – We are courteous, responsive, and respectful 6. Trusted Resource – We are a reliable resource for lowans 	<p>3-YEAR PICTURE™</p>
<p>CORE FOCUS™</p>	<p>Purpose: Enhance the Quality of life for lowans</p> <p>Core Focus: Making affordable financing possible for home and community</p>	<p>Future Date: 6/30/19</p> <p>Measurables: Name Awareness: Increase by 40 percentage points. TG market share increased by 10%</p> <p>What does it look like?</p> <ul style="list-style-type: none"> • Customer and employee feedback system in place • Improve employee engagement • Sustained marketing strategy for each business unit • Adequate workspace for all employees • All policy & procedures documented, understood and followed appropriately • Software in place supporting agency needs • EOS implemented agency wide (80% on Organizational Check Up) • Ensure Right Person Right Seat (95%) • Streamlined process for Single Family Department • Increase Multifamily lending • Data security program ongoing • Performance reviews completed annually for all employees • Secure, stable IT support • Full service HR department: succession planning, retention plans, EOS methodology • Automated customer experience surveys • 100% paperless environment
<p>10-YEAR TARGET™</p>	<p>100% awareness amongst lowans by 2025</p>	
<p>MARKETING STRATEGY</p>	<p>Target Market/“The List”: See separate sheet</p> <p>Three Uniques:</p> <ol style="list-style-type: none"> 1. 2. 3. <p>Proven Process:</p> <p>Guarantee:</p>	



THE VISION/TRACTION ORGANIZER™

ORGANIZATION NAME: Iowa Finance Authority

TRACTION

1-YEAR PLAN	ROCKS	ISSUES LIST																																																										
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**Executive Director
DAVE JAMISON**
LMA
Strategic Planning
Community Development
Finance
Administration
Iowa Title Guaranty
Housing Programs

**Executive Assistant
JESS FLAHERTY**
Director Support
IFA Board
Conf./Meeting Coordination

**Programs
CAROLANN JENSEN**

LMA
Section 8
LIHTC
Multifamily

HOME
Compliance
Asset Management
Housing Revolving Fund

**Administration
CHIEF ADMINISTRATION
OFFICER,
BRIAN CROZIER**

LMA
Legal
Communications/
Marketing

Government Relations
IT
Business Development

**Community Development
LORI BEARY**

LMA
Single-Family
State Revolving Fund
Ag Division

Economic Development/
Conduit Bonds

**Finance
CINDY HARRIS**

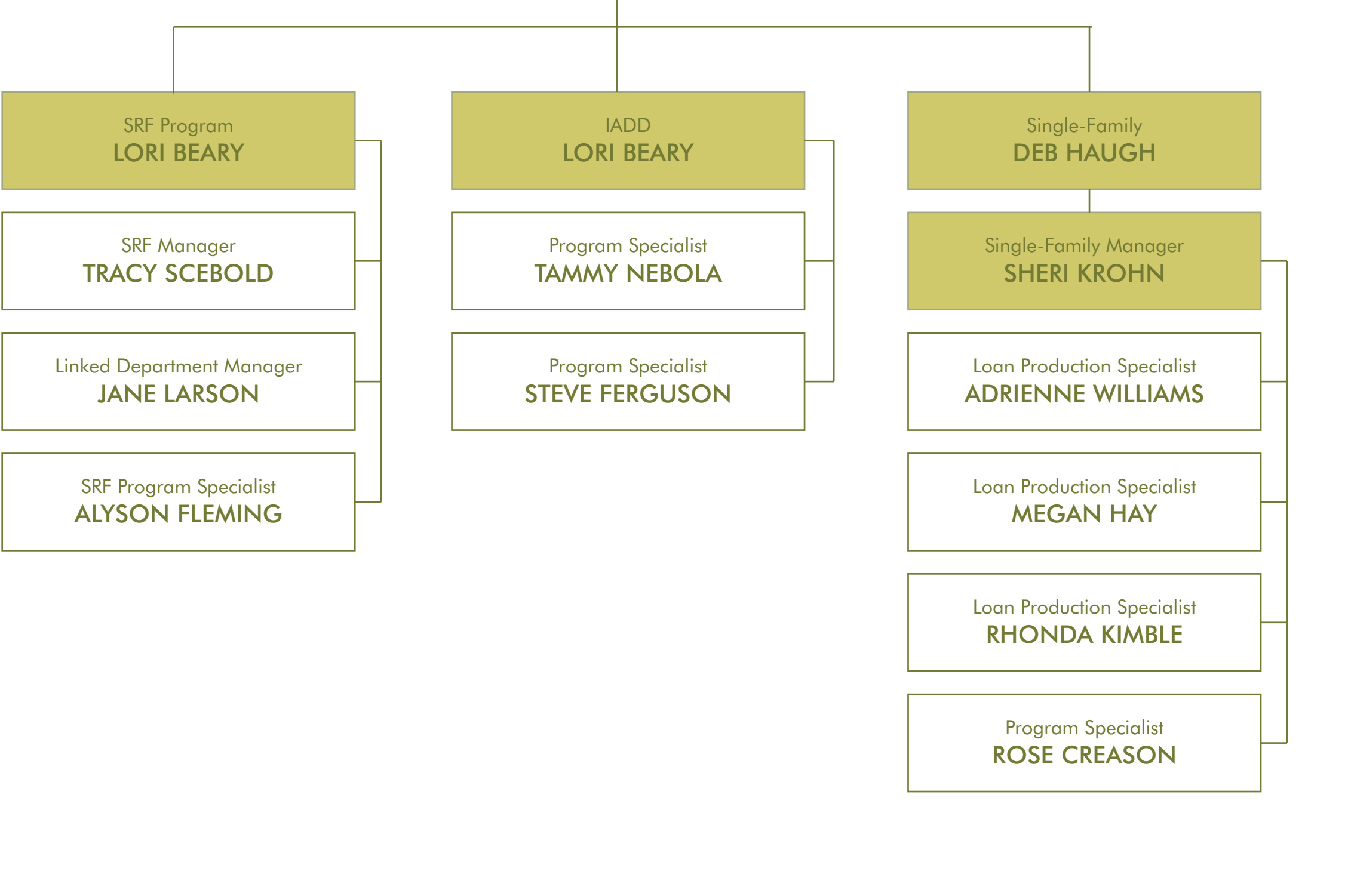
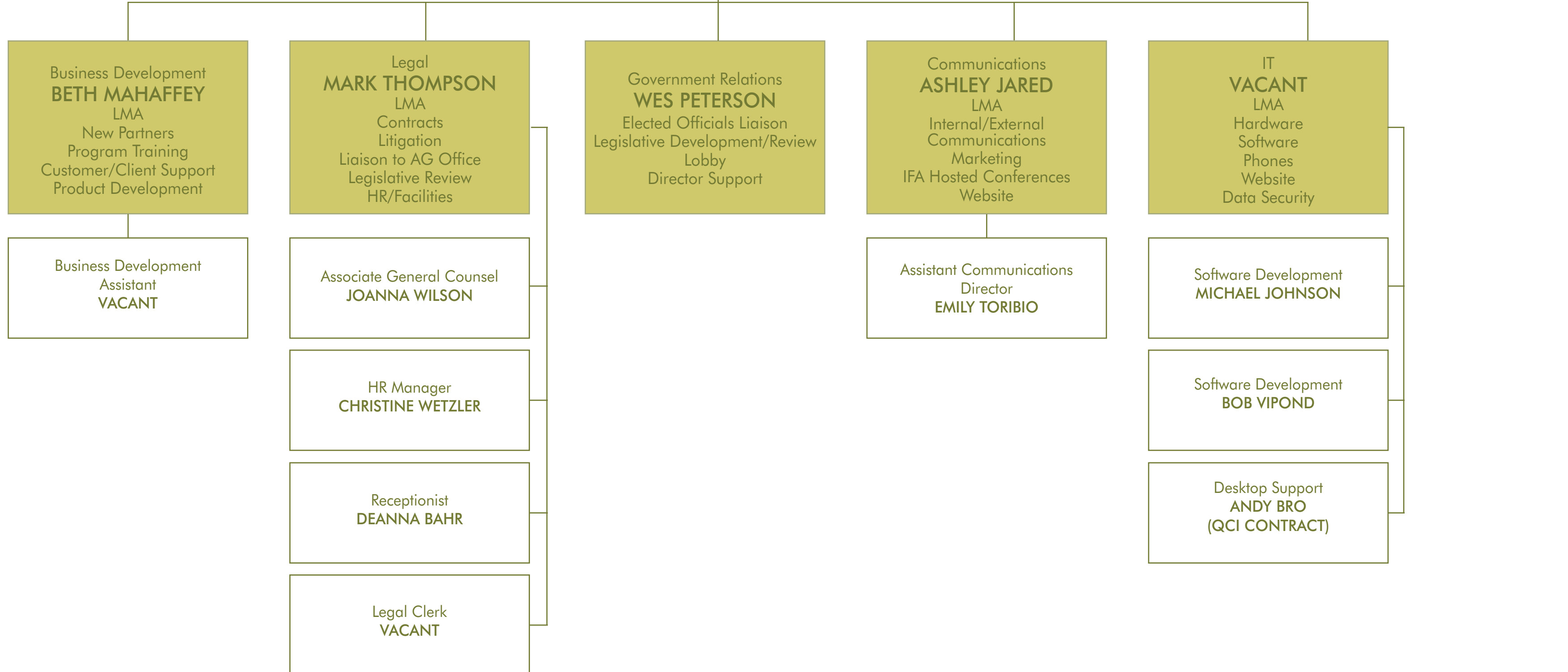
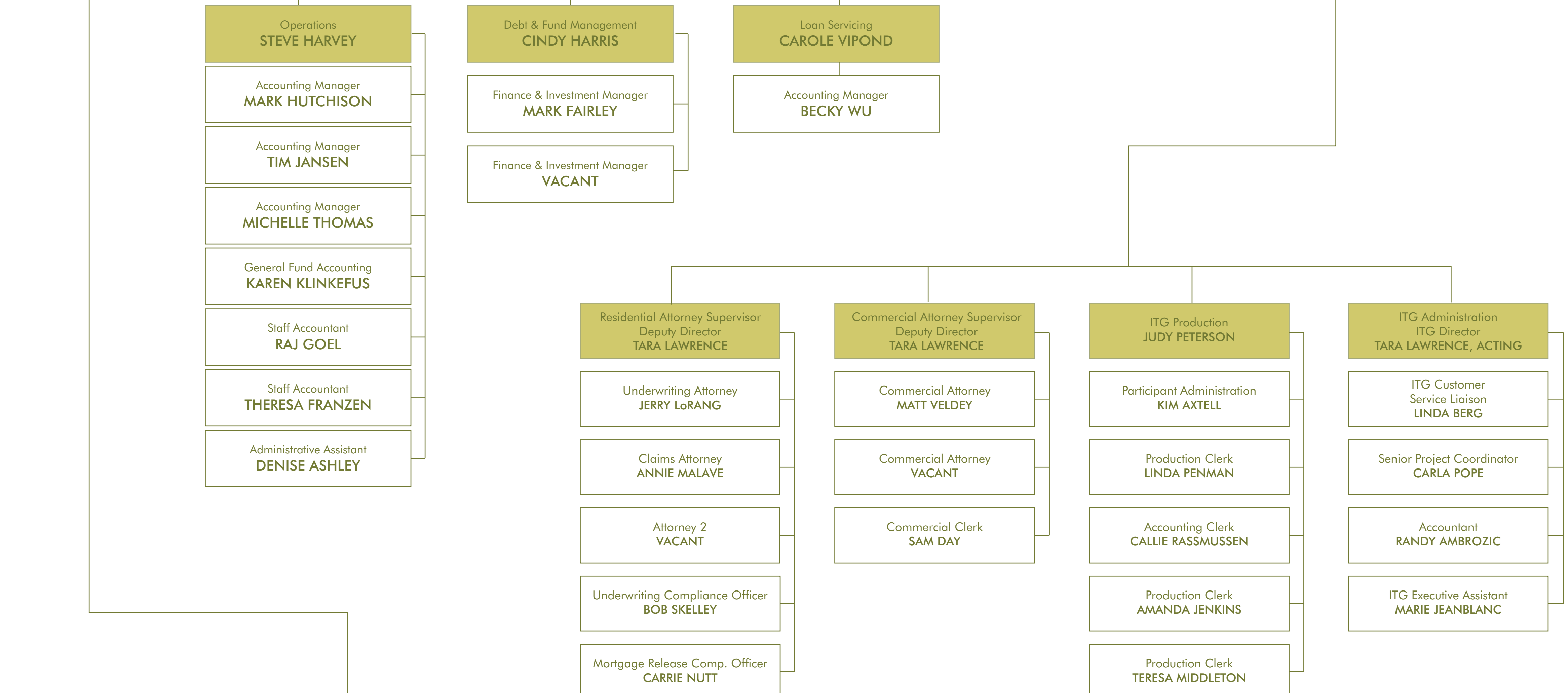
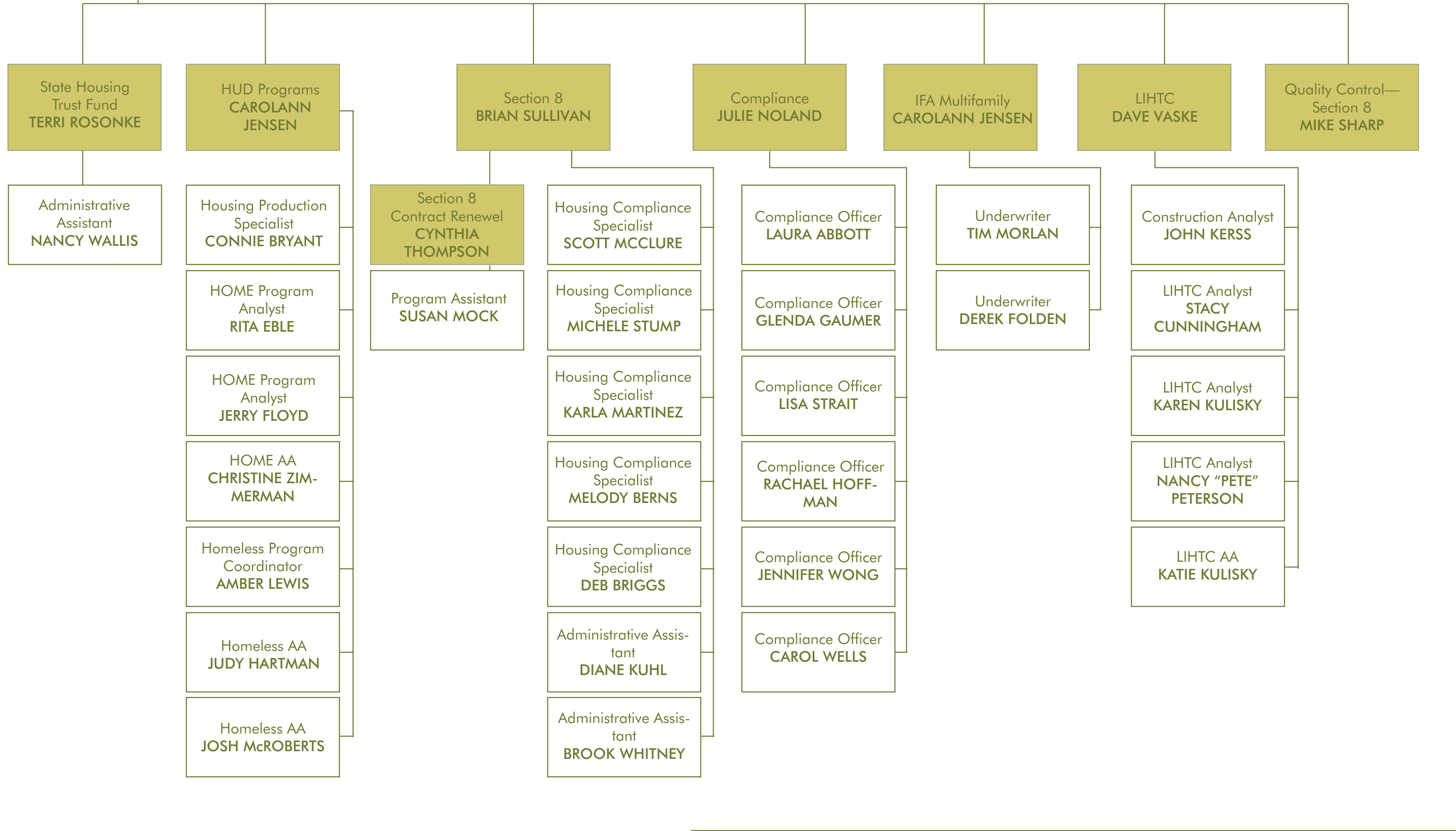
LMA
Accounting/Budget
Loan Servicing

Debt & Fund
Management
Credit Rating

**Iowa Title Guaranty
DIVISION DIRECTOR,
TARA LAWRENCE, ACTING**

LMA
Residential

Commercial
Rating/Resv5





Executive Director
DAVE JAMISON
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Finance
CINDY HARRIS
LMA
Accounting/Budget
Loan Servicing
Debt & Fund Management
Credit Rating

Iowa Title Guaranty
IOWA TITLE GUARANTY
DIVISION DIRECTOR,
TARA LAWRENCE,
ACTING
LMA
Residential
Commercial
Rating/Resv5



**IOWA FINANCE
AUTHORITY**

ADMINISTRATION
CHIEF ADMINISTRATION OFFICER
BRIAN CROZIER

- LMA
- Legal
- Communications/Marketing
- Government Relations
- IT
- Business Development



THE PEOPLE ANALYZER™

NAME	<i>INTEGRITY</i>	<i>MISSION-ORIENTED</i>	<i>PURPOSEFUL WORK ETHIC</i>	<i>ACCOUNTABILITY</i>	<i>CUSTOMER-SERVICE FOCUS</i>	<i>TRUSTED RESOURCE</i>			
John	+	+	+	+	+	+/-			
Sally	+	+	+	+	+	+			
Susan	+	+	+	+	+	+			
James	+	+	+	+	+	+			
Larry	+	+	+/-	+	+	+			
The Bar									

Rating: + +/- -



L10 Meeting Agenda

- I. Segue (5 min cap)**
 - a. Personal Good News
 - b. Professional Good News

- II. Scorecard Review (5 min)**
 - a. Review Scorecard
 - b. On-track/Off-track to the goal
 - c. Off-track Issues go to IDS (Drop it down)

- III. Rock Review (5 min)**
 - a. Review Company and individual rocks
 - b. On-track/Off-track
 - c. Off-track issues go to IDS (drop it down)

- IV. Customer & Employee Headlines (5 min)**
 - a. Customer News
 - b. Employee News
 - c. Customer/Employee Issues go to IDS (Drop it down)

- V. To-Do List (5 min)**
 - a. Review to-do list
 - b. Done/not done
 - c. To-do list issues go to IDS (drop it down)

- VI. IDS (30 min)**
 - a. Review issues list
 - b. Prioritize 1-2-3
 - c. IDS the issues one at a time
 - d. Repeat until complete or out of time

- VII. Conclude (5 min)**
 - a. Recap to-do list
 - b. Cascading messages
 - c. Rating 1-10 score

