

# Multifamily Scoring Wizard

## Minnesota Housing

Management Innovation: Technology

### HFA Staff Contact

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## OVERVIEW

Each year, Minnesota Housing and its funding partners allocate approximately \$185 million in deferred loans and \$12 million in 9% Housing Tax Credits to build or preserve over 1,200 homes through a competitive request for proposals process. Funding requests typically exceed available resources by three to one. To distribute financing in a transparent and equitable manner, Minnesota Housing has created a scoring framework that assigns points to projects based on how well a project meets the funding priorities in Minnesota Housing's Strategic Plan. To remain responsive to community's changing housing needs, the scoring framework is updated on a bi-annual basis.

With constant changes to preferences, priorities, timelines, funding types, and funding amounts, we were in urgent need to find a new solution to our scoring process that allowed us to make required changes in an ever shorter amount of time, reduce the chance of errors, enable us to identify/select the most impactful projects for our community, address multiple pain points, and improve the overall user experience.

## OUR INNOVATIVE SOLUTION

By working closely with our business partners, leadership, and our end users, we completely re-imagined how our scoring process functioned and was supported. Using state of the art technology, we transformed a highly complex application that took literally hundreds of hours (800+) to re-design, build, test, and update all the downstream integrations into a highly user-friendly Scoring Wizard that can be effectively and efficiently modified year after year to meet the constantly changing local, state, and federal guidelines. To add icing to the cake, the business can make many of the changes without needing to contact our friendly IT department!



#PowerToThePeople

## IS REPLICABLE

Knowing the old adage that the only constant is change, we needed to design an application that could be configured to meet the needs of each unique funding round with no maximum limit (Minnesota Housing is currently managing 21 unique funding rounds simultaneously), accommodate two or two million applicants, be easily maintained by the business, and be reused versus rebuilt each and every year. Our solution, built on the Salesforce platform, utilizes multiple, configurable, scalable, maintainable, and reusable main components:

- **Scoring Model** – developed to dynamically store all the funding round specific data in separate sub-components, resulting in a highly manageable and reusable system. Simply clone a scoring model from a previous year, make changes as necessary and it is ready to use!
- **Scoring Wizard User Interface** – gives us the ability to set up questions and logic in a series of reusable flows and sub-flows that are specific to the funding round year and guides the user through a set of questions to enter data related to their project structure.
- **Rules Engine** – a set of predefined rules that provide warnings and/or limit the user from entering data that would result in awarding/claiming points that they are not entitled to receive. Rules can be simultaneously configured and maintained for each individual funding round.

## RESPOND TO A MANAGEMENT CHALLENGE OR OPPORTUNITY

If NCSHA had a category for the most complicated Excel spreadsheet ever, we could have submitted our Excel based 39-page Self-Scoring Worksheet built with tens of thousands of lines of VBA code and would

have won in a landslide! Although the system met the needs of the business for many years, we knew that this was not sustainable in the long run. Some of the issues our external applicants, internal users, and our IT staff experienced included:

- **Platform Constraints** – scoresheets being built in Excel required us to send out a new version when changes were made or errors were found. (If someone was already in process, they had to start over from scratch!)
- **Maintaining Multiple Systems and Processes** – all our processes could not be done in a single system, requiring us to maintain multiple systems and processes. Changes in one system meant changes in others. #DownStreamEffects
- **Compatibility Issues** – with no control over users’ environments, our users experienced issues related to MS office versioning (older/newer, Windows vs. Mac, etc.).
- **Redundant Data Entry** – not only an inefficient use of time but was also highly prone to errors.
- **No Data Validation** – no easy way to only ask for the data that was needed based on the specific details of the project or validate the data entered was accurate and met our requirements.
- **Manual Calculations** – required user to calculate all their own values and redo all their math when any changes were made (Yay Math! Said no one EVER!)
- **Supporting Documentation** – users had to upload documentation to support the data they entered and the points they claimed into a separate section of the Portal, with no relationship to the scoring data.
- **Overly Complicated Review Process** – to complete internal reviews and reporting, we had to extract the data from each uploaded Excel worksheet and write this data to a database.
- **Lacked Standard Reporting Capabilities** – due to the complexity, code was required to create reports and letters, which needed to be re-written when even small changes were made.

## ACHIEVES MEASURABLE IMPROVEMENTS IN AGENCY OPERATIONS

From a technical perspective, we spent additional time and effort designing, building, and testing a highly robust and secure system that is easily configurable (#clicksNotCode) by the business users, yet maintainable by our IT staff. Knowing that we ultimately had to deliver a Scoring Wizard that was accessible, efficient, and user-friendly for users of varying technical knowledge using different devices, we used human centered design techniques throughout the design/build process.

- **Guides the user through the scoring process** – users enter information about their project and the scoring wizard identifies the points their projects are eligible for based on the information provided.
- **Allows user to create multiple test scenarios** – users may not be sure how claiming certain criteria will impact their score; let them try it a variety of ways!
- **Reduces duplicative data entry** – Total units, for instance, is used dozens of times. Prior to the Scoring Wizard, the user entered total units separately and did manual calculations for each question. (Enter Once Use Many)
- **Eliminates non-applicable categories** – allows us to define dependencies between questions, so if the user is not applying for a particular program or priority, the system will simply hide these non-applicable data fields using dependent and controlling fields.
- **Data validation** – our Scoring Wizard rules engine will flag the user to update data that was entered in error. Previously, if the user did not catch the error prior to submission, it would be identified during the internal review and result in a less competitive project that could not be restructured, wasted time, and ultimately frustrated applicants.
  - **In-field validation** – system validates data entered and flags users to make updates.

- **Cross question validation** – allows us to define and easily enforce the combination of units or points that an applicant can apply for.
- **Auto-calculates formulas in real-time to reduce complexity and errors.** Not sure which value to include in the denominator ([Should I use total units or assisted units](#))? The scoring wizard does the calculations for users. Simply update the total units and the system will update all the calculations automatically and notify you of any resulting validation errors!
- **Supporting Documentation** – are there documents required for certain categories or specific questions? The system allows the business to identify whether files are required to claim certain points, by question or category, and not allow users to submit their scoresheet until these files have been dropped or uploaded!
- **Provides easy access to scoring resources** – links to the scoring guide and other valuable resources throughout the scoring wizard when/where needed.
- **Internal review process** – allows management to easily assign, manage, and track primary, secondary, and final reviews.
- **Reporting and Dashboards** – what good is a system if you cannot easily combine multiple sources of data together to create professional reports and professional?



*How may I help?*

## **BENEFITS OUTWEIGH COSTS**

As we all know when building a new tool or application, there is typically a resource investment that must be recouped within the reasonable expected useful lifespan of the tool or application. Although some costs and benefits are easy to evaluate (hard costs/benefits, others are not as easily quantified (soft costs/benefits). Based on project costs, projected ongoing maintenance, and actual/projected benefits, we are expecting our return on investment (ROI) between years two and three.

## **DEMONSTRATES EFFECTIVE USE OF RESOURCES AND ACHIEVE STRATEGIC OBJECTIVES**

If we had an endless stream of resources (time, money, and people), we would not have to choose one project over another. Unfortunately, we live in the real world and therefore need to prioritize what we work on and what we pass on. To facilitate this process, we developed a process to quantify the impact and the cost of potential projects and assign 0 to 20 points based on this value.

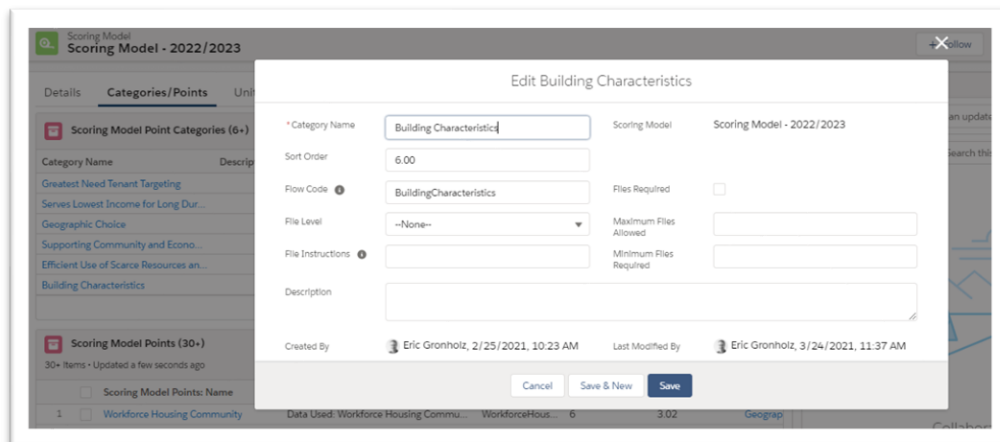
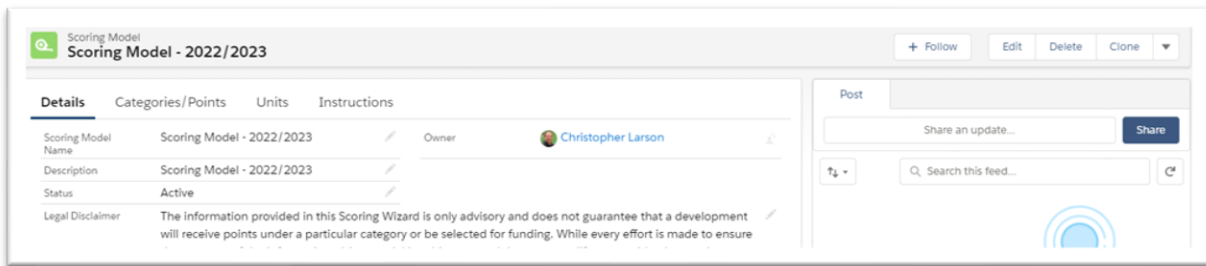
- Impact (Meets agency strategic priorities, annual time savings (soft costs), Annual cost savings, one-time cost savings, reduce risk, go green, and improved customer experience)
- Cost (Business/IT staff hours, annual costs, one-time costs)

After assigning these impact/cost value, we plot them on a quadrant to determine which projects we should work on and in what order. Based on budget, we try to focus on two (2) strategic projects during the year. The Scoring Wizard is a strategic project because it supports our vision of all Minnesotans living and thriving in a safe, stable home they can afford in a community of their choice.

While we leveraged a powerful software platform, the key to the success of this project was our continued commitment to the co-ownership model between business, technology teams, and external users.

## Appendix A: Behind the Scenes Structure

- **Scoring Model** – developed to dynamically store all the funding round specific data in separate components, resulting in a highly manageable and reusable system. Simply clone a scoring model from a previous year, make changes as necessary and it is ready to use!
  - Business Team can easily modify items such as the legal disclaimer, categories, questions, thresholds, priorities, points awarded, instructions, etc. without the assistance of our software developers!



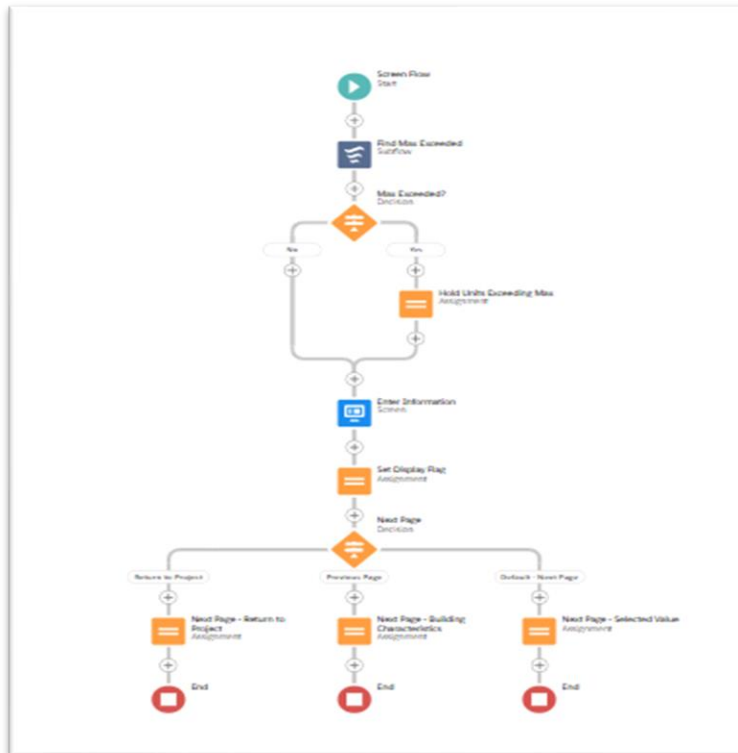
- Software developers can modify the backend code, to modify screen layouts, flows, sub-flows, logic, etc. for the entire system OR for individual funding rounds!

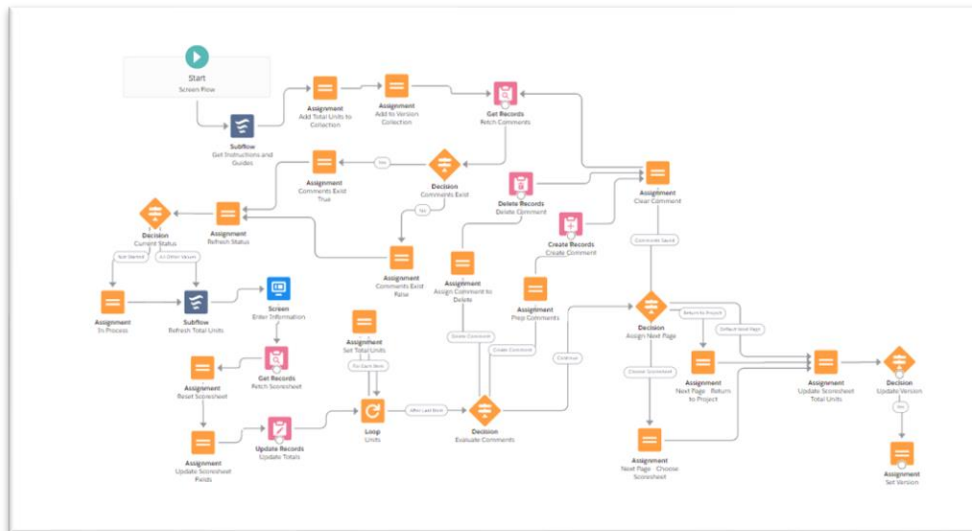
**SETUP Flows**

Flow Definitions  
**All Flows** ▼ [Filter Icon]

59 Items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label ↑	Process Type	Active	Trigger
Scoresheet Launcher V2	Screen Flow	<input checked="" type="checkbox"/>	
Scoresheet Setup - Choose or Create	Screen Flow	<input checked="" type="checkbox"/>	
Special Claim Record type updates	Autolaunched Flow	<input checked="" type="checkbox"/>	Record-Run After Save
Special Claim Status	Autolaunched Flow	<input checked="" type="checkbox"/>	Record-Run After Save
subFlow - Add Scoresheet Unit to Collection	Screen Flow	<input checked="" type="checkbox"/>	





- Scoring Wizard User Interface** – Ability to setup questions and logic, in series of reusable flows and sub-flows, specific to the funding round year, that guides the user through a set of questions to enter data related to their project structure.
  - Hide Non-Related Questions** - Project DOES NOT include set asides for People with Disabilities

Please see the [selection criteria / streamlines need tenant targeting](#) section of the scoring guide

**\*\*NOTE\*\*** Large Family Housing points are automatically calculated from what was entered on the Assisted Units grid on the Minimum Threshold Requirements tab AND the selection for 'What age group is your project restricted to?'. Points are displayed on the Claim Points tab.

[Download the 2022/2023 Self Scoring Worksheet](#)     
 [Download the 2022 Scoring Guide](#)     
 [Download the Scoring Wizard User Guide](#)

Instructions  Click to Hide

What age group is your project restricted to?

Seniors 55+  
 Not restricted to a particular age group

My project meets the High Priority Homeless (HPH) threshold

Yes  
 No

My project meets the People with Disabilities (PWD) threshold

Yes  
 No

- **Display Related Questions** - Project DOES include set asides for People with Disabilities

Scoring Wizard

**\*\*NOTE\*\*** Large Family Housing points are automatically calculated from what was entered on the Assisted Units grid on the Minimum Threshold Requirements tab AND the selection for 'What age group is your project restricted to?' Points are displayed on the Claim Points tab.

[Download the 2022/2023 Self Scoring Worksheet](#)
[Download the 2022 Scoring Guide](#)
[Download the Scoring Wizard User Guide](#)

Instructions  CLICK TO HIDE

What age group is your project restricted to?

Seniors 55+  
 Not restricted to a particular age group

My project meets the High Priority Homeless (HPH) threshold

Yes  
 No

My project meets the People with Disabilities (PWD) threshold

Yes  
 No

Did you submit a Pre-App for Section 811?

Yes - Eligible  
 Yes - Ineligible  
 No

**PWD 811 Units - May not exceed 11 units**

Unit Description	Total	Pct of Tot...
Enter the number of units for People with Disabilities using 811	0	0%

- **Rules Engine** – A set of predefined rules that provide warnings and/or limit the user from entering data that would result in awarding/claiming points that they are not entitled. Rules can be configured and maintained for each funding round individually.

Scoring Wizard

**\*\*\* Minimum Threshold Requirements Not Met \*\*\***

Due to the reason(s) listed below, your answers do not qualify you for this option. Click *Change Values* to alter your responses, or click *Leave Scoring Wizard* to end.

- The values entered under the **Minimum Threshold Requirements** section do not satisfy minimum requirements



## Appendix B: Scoring Wizard Screenshots

- Scoring Wizard/Scoresheet Management** – allows the user to select/delete/clone existing scoresheets and create new test/final version.

**Project Details**  
 Name: Test project 4\_2020 HTC R2  
 D #: D2278  
 Property: Sun Fish Lake Townhomes  
 Submission Due Date: January 17, 2020

Primary Project #: M18258  
 Proposal Type:  
 Secondary Project #:  
 Proposal Type:

Welcome to the Scoring Wizard!  
 \*\*\* Scoresheets must be submitted by January 17, 2020 to qualify for consideration \*\*\*

Legal Disclaimer   
 Click to Show Disclaimer

[Return to Project](#)

Welcome to the Scoring Wizard!  
 (1) Select an existing scoresheet to view, edit or delete,  
 --OR--  
 (2) Scroll down to create a new scoresheet for this project. A maximum of four (4) scoresheets can be created for a project.

NOTE: The FINAL version must be submitted to be considered for funding. Once the FINAL version is submitted

- It may only be opened for review
- only TEST scenarios may be created
- TEST scenarios may not be converted to FINAL.

Select an Existing Scoresheet

	Version	Status	Pts Available	Pts Claimed	# of Units	Created Date	Last Modified Date
Testing the submittability	Final Version	In Process	138	138	16	4/1/2021, 03:55 PM CDT	4/6/2021, 01:59 PM CDT

[Clear Selection](#)

[Delete Selected Scoresheet](#) [Clone Selected Scoresheet](#) [Open Selected Scoresheet](#)

Create a new scoresheet for this project by clicking the appropriate button below

**Test Scenario**

Create a test scenario. You may convert to a final version at any time prior to the scoring deadline.

**Final Version**

Create a final scoresheet version. Only ONE final version can be created per project.

- Scoring Wizard/Scoresheet Setup** – prompts the user to manage characteristics that are used through the Wizard for displaying/hiding fields and calculating points.

Scoresheet Setup > Minimum Thresh... > Greatest Need Te... > Serves Lowest Inc... > Supporting Com... > Efficient Use of Sc... > Building Characte... > Claim Points > Review and Report

Project Information - Scoresheet Setup

[Download the 2022/2023 Self Scoring Worksheet](#) [Download the 2022 Scoring Guide](#) [Download the Scoring Wizard User Guide](#)

Instructions   
 Click to Hide

\* Briefly describe the scenario (e.g. 9% HTC with PWD & HPH units, 4% HTC with 811 rental assistance, etc.) that you are scoring. This field is used to help you differentiate between scoresheet scenarios and can be referenced later. It does not impact your score.

Testing the submittability

\* Select the Scoresheet Version. If 'Final Version' is selected and another scoresheet is marked as the 'Final Version', that scoresheet will be converted to a 'Test Scenario'. The Final Version of the Scoresheet must be submitted (from the Review and Report tab) to be considered for funding.

Final Version  
 Test Scenario

\* Where is your project located?

Metropolitan Area - Minneapolis and St. Paul  
 Metropolitan Area - Suburban  
 Greater MN - Urbanized  
 Greater MN - Rural and Small Urban

\* My project is a Scattered Site property

Yes  
 No

Enter your project's Unacceptable Practices points. Enter 0 if no points.

0

**Total Units by Size**

Unit Description	SRO	Efficiency	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	Total Units
Enter the total number of units for each size of unit	2	2	2	2	2	2	2	2	16

- **In-field validation** – system validates data entered and flags users to make updates

[Scoresheet Se...](#) > [Minimum Thr...](#) > [Greatest Need...](#) > [Serves Lowest...](#) > [Supporting Co...](#) > [Efficient Use o...](#) > [Building Char...](#) > [Claim Points](#) > [Review and Re...](#)

### Project Information - Minimum Threshold Requirements

Please see the [Round 1 - Minimum Threshold Requirements Section](#) of the Scoring Guide

[Download the 2022/2023 Self Scoring Worksheet](#)     
 [Download the 2022 Scoring Guide](#)     
 [Download the Scoring Wizard User Guide](#)

Instructions  [Click to Hide](#)

#### Assisted Units

##### Assisted Units by Size

Unit Description	SRO	Efficiency	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	Total U...
Enter the number of Assisted Units for each unit size.	<input type="text" value="7"/> <small>5 max</small>	<input type="text" value="15"/> <small>10 max</small>	<input type="text" value="9"/> <small>8 max</small>	<input type="text" value="25"/> <small>20 max</small>	<input type="text" value="5"/>	<input type="text" value="5"/>	<input type="text" value="5"/>	<input type="text" value="5"/>	<b>76</b>

- **Cross question validation** – allows us to define and easily enforce the combination of units or points that an applicant can apply for.

### Scoring Wizard

**\*\*\* HPH Units Exceeds Total Units \*\*\***

The total units entered for High Priority Homeless (HPH) may not exceed the total units entered for the project. Click [Change Values](#) to alter your responses, or click [Leave Scoring Wizard](#) to end.

**\*\*\* HPH and PWD811 Units Too High \*\*\***

The total units entered for High Priority Homeless (HPH) and PWD 811 may not exceed 25% of the total units entered for the project. Click [Change Values](#) to alter your responses, or click [Leave Scoring Wizard](#) to end.

- **Scoring Wizard/Minimum Threshold Requirements** – helps ensure [GL(1)] that the projects meet our agency priorities and preferences as identified for the funding round.

Project Information - Minimum Threshold Requirements

Instructions  Click to Show

**Assisted Units**

**Assisted Units by Size**

Unit Description	SRO	Efficiency	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	Total Units
Enter the number of Assisted Units for each unit size.	2	2	2	2	2	2	2	2	16

**Preferences**

\*Will your project have an Eventual Tenant Ownership component?  
 Yes  
 No

\*Was the project determined by Minnesota Housing through the pre-application process to be eligible for the Innovative Construction Techniques component?  
 Yes  
 No  
 Not Applying for this preference

Reduces total construction costs by at least 10%  
 Reduces the time a project is under construction by at least 20%

**Deeper Rent Targeting**

\*My project includes project-based rental assistance for 100% of the units.  
 Yes  
 No

Minimum Threshold Requirements

### Scoring Wizard

**\*\*\* Minimum Threshold Requirements Not Met \*\*\***

Due to the reason(s) listed below, your answers do not qualify you for this option. Click *Change Values* to alter your responses, or click *Leave Scoring Wizard* to end.

- The values entered under the **Minimum Threshold Requirements** section do not satisfy minimum requirements

Project Information - Minimum Threshold Requirements

Please see the [Round 1 - Minimum Threshold Requirements Section](#) of the Scoring Guide

[Download the 2022/2023 Self Scoring Worksheet](#)
[Download the 2022 Scoring Guide](#)
[Download the Scoring Wizard User Guide](#)

Instructions  Click to Hide

**Assisted Units**

**Assisted Units by Size**

Unit Description	SRO	Efficiency	1 BR	2 BR	3 BR	4 BR	5 BR	6 BR	Total U...
Enter the number of Assisted Units for each unit size.	7	15	9	25	5	5	5	5	76
	5 max	10 max	8 max	20 max					

- **Scoring Wizard/Greatest Need Tenant Targeting** – the user enters data about how their project serves tenants experiencing the greatest need.

**Scoring Wizard - Greatest Need Tenant Targeting**

**Project Information - Greatest Need Tenant Targeting**

Instructions:  Click to Show

What age group is your project restricted to?  
 Seniors 55+  
 Not restricted to a particular age group

My project meets the High Priority Homeless (HPH) threshold  
 Yes  
 No

**High Priority Homeless (HPH) - Total HPH Units may not exceed 16 units**

Unit Description	Total	Pct of Total Units
Enter the number of units for HPH - Youth with Children	4	25%
Enter the number of units for HPH - Youth Singles	0	0%
Enter the number of units for HPH - Single Adults	0	0%
Enter the number of units for HPH - Families with Children	0	0%

Choose the Continuum of Care Household Type Priority One  
 Youth with Children  
 Youth Singles  
 Single Adults  
 Families with Children  
 Not Applicable

**Continuum of Care Units - 16 Total Units**

Unit Description	Total	Pct of Total Units
Enter the number of units targeted to Continuum of Care Household Type Priority One	4	25%

My project meets the People with Disabilities (PWD) threshold  
 Yes  
 No

**Save & Close**

- **Scoring Wizard/Serves Lowest Income for Long Durations** – the user enters data about how their project provides new or maintains existing rental assistance.

**Scoring Wizard - Serves Lowest Income for Long Durations**

**Project Information - Serves Lowest Income for Long Durations**

Instructions:  Click to Show

**Preservation and Rental Assistance**

What preservation threshold does your project meet?  
 Risk of Loss Due to Market Conversion  
 Risk of Loss Due to Critical Physical Needs  
 Risk of Loss Due to Ownership Capacity/Program Commitment  
 Not Applicable

**Rental Assistance - 16 Total Units**

Unit Description	Total	Pct of Total Units
Enter the number of Rental Assistance units	16	100%
Enter the number of Rental Assistance units with rents restricted to 30% MTSP Income limit for minimum of 10 years	8	50%

**Serves Lowest Income Tenants/Rent Reduction - 16 Total Units**

Unit Description	Total	Pct of Total Units
Enter the number of non Rental Assistance units with rents restricted to households with incomes at the 50% MTSP Income limit	16	100%
Enter the number of non Rental Assistance units which are further restricted to the 30% MTSP rent limit	8	50%

**Long-term Affordability**

Do you agree to extend the long-term affordability? If so, please select the number of years:  
 50 Years  
 40 Years  
 None

**Save & Close**

- **Scoring Wizard/Geographic Choice** – using our Minnesota Housing’s Community Profile ArcGIS map, the user can enter data to help determine scoring for geographic priorities.

- **Scoring Wizard/Supporting Community and Economic Development** – allows the user to provide data to demonstrate how their project supports the community economic development initiatives.

- **Scoring Wizard/Efficient Use of Scarce Resources and Leverage** – allows us to assess the project’s financial readiness to proceed.

**Scoring Wizard**

**ScoreSheet Details**  
 Description: Testing the submitability  
 Version: Final Version  
 Total Units: 16  
 Status: In Process

**Project Details**  
 Name: Test project 4\_2020 HTC R2  
 ID #: 02278  
 Property: Sun Fish Lake Townhomes  
 Submission Due Date: January 17, 2020

**Primary Project #:** M18358  
**Proposal Type:**  
**Secondary Project #:**  
**Proposal Type:**

ScoreSheet Setup → Minimum Threshold → Greatest Need Tenants → Serves Lowest Income → Supporting Commu... → **Efficient Use of Scarce Resources and Leverage** → Building Characteristics → Claim Points → Review and Report

**Project Information - Efficient Use of Scarce Resources and Leverage**

Instructions  Click to Show

What are your Total Development Costs for your project?  
 \$100,000

Unit Description	Amount	Pct of Total Costs
How much Capital Funding has been secured, awarded or committed for your project?	\$25,000	25%
What are your Other Contributions for your project?	\$15,000	15%
What are your Intermediary Costs for your project?	\$2,500	2.5%

Save & Close      << Previous      Save & Next

- **Scoring Wizard/Building Characteristics** – allows us to assess the project’s building characteristics, such as, Universal Design, supporting Smoke Free Buildings, and meeting the Enhanced Sustainability criteria.

ScoreSheet Setup → Minimum Threshold Req → Greatest Need Tenant Tar → Serves Lowest Income for... → **Building Characteristics**

**Project Information**

Instructions  Click to Show

Does your project meet Universal Design criteria?  
 Yes  
 No

Choose the appropriate response to this statement: My project has  
 Buildings with an elevator  
 Buildings without an elevator  
 Buildings with and without an elevator

Enter the number of Assisted Units in buildings WITH an elevator

Enter the number of Assisted Units in buildings WITH an elevator meeting the definition of Universal Design

Enter the number of Assisted Units in buildings WITHOUT an elevator

Enter the number of Assisted Units in buildings WITHOUT an elevator meeting the definition of Universal Design

Does your project meet the standards for Smoke Free Buildings?  
 Yes  
 No

What tier(s) does your project meet for Enhanced Sustainability?

- **Scoring Wizard/Claim Points** – displays all the points the applicant is potentially qualified for by category and individual criteria.

**Project Test project 4\_2020 HTC R2 Review**

Criteria	Points Claimed	Points Available to Claim
Greatest Need Tenant Targeting	9	9
Serves Lowest Income for Long Durations	53	53
Geographic Choice	22	22
Supporting Community and Economic Development	17	17
Efficient Use of Scarce Resources and Leverage	32	32
Building Characteristics	5	5
Unacceptable Practices	0	0

- **Scoring Wizard/Uploading Supporting Documentation** – allows the user to upload supporting documentation for internal users to review.

**Senior Housing**  
Points To Claim: 3  
Claimed Points: 3  
Data used: Senior Assisted Units grid AND selection for Restricted to a Particular Age Group

**Senior Housing - 30% MTSP Income Limit**  
Points To Claim: 4  
Claimed Points: 4  
Data used: Senior Assisted Units grid AND selection for Restricted to a Particular Age Group

- **Scoring Wizard/Data Validation – Verify Only OR Verify and Submit.**

Data Used: Total Development Costs AND Intermediary Costs		
<b>Building Characteristics</b>	<b>8</b>	<b>6</b>
Universal Design		
Data Used: Selection for Elevator Status AND Units for Universal Design	3	3
Smoke Free Buildings		
Data Used: Selection for Smoke Free Buildings	1	1
Enhanced Sustainability		
Data Used: Selection for Enhanced Sustainability	4	2
<b>Unacceptable Practices</b>	<b>0</b>	<b>0</b>
Unacceptable Practices		
Data Used: Unacceptable Practice Points	0	0
<b>TOTAL POINTS</b>	<b>152</b>	<b>131</b>

Print to PDF

- **Scoring Wizard/Data Validation Page –** helps ensure that all data has been entered and criteria has been met.

Scoresheet Setup
Minimum Threshold
Greatest Need Ten.
Serves Lowest Inco.
Supporting Commu.
Efficient Use of Scar.
Building Characteris.
Calm Points
Review and Report

\*\*\* VERIFICATION SUCCESSFUL \*\*\*  
All data verified.

Print to PDF



### Scoring Summary Report

2021 HTC 4% Only Round  
**Project:** Amber Union  
**Scoresheet Version:** Agency Review - Initial  
**Scoresheet Status:** In Process  
**Description:** Agency Review - Initial

<b>Primary Project #:</b> M18656	<b>Secondary Project #:</b>
<b>Primary Proposal Type:</b>	<b>Secondary Proposal Type:</b>

**SCORESHEET SETUP**

**Project Location:** Metropolitan Area - Minneapolis and St. Paul  
NA: Project is a Part of the Project NA

- **Scoring Wizard/Submission Process –** everyone needs positive feedback!

### Scoring Wizard

\*\*\* VALIDATION SUCCESSFUL \*\*\*  
 All data verified. Would you like to submit this scoresheet?

The scoresheet passed all validations and is ready to be assigned to the next reviewer. By submitting this scoresheet, a new review version will be created for the next reviewer. Would you like to continue?



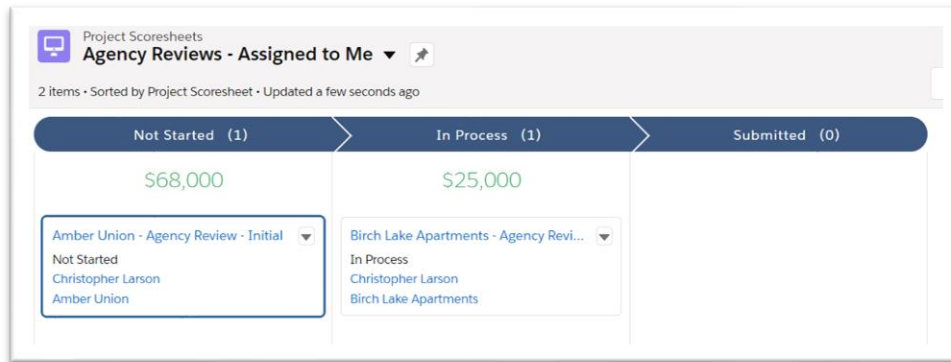
- **Scoring Wizard/Review Process – List View**

Project Scoresheets  
**Agency Reviews - Assigned to Me** ▼ ✎  
 2 items • Sorted by Project Scoresheet • Filtered by All project scoresheets - My Review, Scoresheet Version • Updated a few seconds ago

Search this list...

	Project Scoresheet ↑	Scoresheet ...	Reviewer	Project	Scoresheet Version
1	Amber Union - Agency Review - Initial	In Process	Christopher Larson	Amber Union	Agency Review - Initial
2	Birch Lake Apartments - Agency Review - Secondary	In Process	Christopher Larson	Birch Lake Apartments	Agency Review - Secondary

- **Scoring Wizard/Review Process – Kanban Board**



- **Scoring Wizard/Review Process – Console View**

Agency Reviews - All ▼ + ✎  
 7 items • Updated 3 minutes ago

Project Scoresheet ↑

- Amber Union - Agency Review - Initial (Not Started) - Christopher Larson
- Birch Lake Apartments - Agency Review - Final (In Process) - SJC Gronholz
- Birch Lake Apartments - Agency Review - Initial (In Process) - SJC Gronholz
- Birch Lake Apartments - Agency Review - Secondary (In Process) - Christopher Larson
- VBK Test Project\_2020 Avail Fin\_2020-11-25 - Agency Review - Initial (In Process) - Chuck Commerford
- VBK Test Project\_2020 Avail Fin\_2020-11-25 - Agency Review - Initial (Not Started)

Project Scoresheet  
**Amber Union - Agency Review - Initial** + Follow Scoring Wizard Edit Clone Delete

Project: Amber Union    Record Type: Scoring Model - 2022/2023    Points Available: 131.00    Points Claimed: 131.00

Not Started      In Process      Submitted      ✓ Mark Scoresheet Status as Complete

Details    **Units**    Claim Categories/Points    Comments

Scoresheet Units (22)  
 22 items • Updated a few seconds ago

	Scoresheet Unit	Total Units	Pct of Total	Display Area
1	Total # of Units	111	100.00%	Scoresheet Setup
2	Assisted Units	83	74.77%	Minimum Threshold
3	30% MTSP Rent Limit	15	13.51%	Minimum Threshold
4	Housing Assistance Payment (HAP)	19	17.12%	Minimum Threshold
5	Seniors 55+	0	0.00%	Greatest Need Tenar
6	Seniors 55+ and 30% MTSP	0	0.00%	Greatest Need Tenar

Activity    Chatter

Filters: All time • All activities • All types ▼

Refresh • Expand All • View All

**Upcoming & Overdue**

No next steps.  
 To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

- **Scoring Wizard/Review Process – Change/history tracking and comments**

The screenshot shows a web-based interface for reviewing project information. At the top, there is a progress bar with steps: Scoresheet Setup, Minimum Threshold, Greatest Need Tena..., Serves Lowest Inco..., Supporting Commu..., Efficient Use of Scar..., and Building Characteris... The current step is 'Building Characteristics'.

The main heading is 'Project Information - Building Characteristics'. Below it, there are links to download the 2022/2023 Self Scoring Worksheet, the 2022 Scoring Guide, and the Scoring V... (likely the Scoring Worksheet).

There is a section for 'Instructions' with a 'Click to Hide' button. Below that, a question asks 'Does your project meet Universal Design criteria?' with radio buttons for 'Yes' (selected) and 'No'.

Under 'Primary Reviewer Comments', there is a comment from Christopher Larson dated 4/28/2021 01:58 PM, stating: 'Verified with the developer that the building does NOT have an elevator, adjusted the answer and combined the 25/25 units into 50 total.' There is an 'Add Comment' button below this comment.

Another section asks to 'Choose the appropriate response to this statement: My project has' with radio buttons for 'Buildings with an elevator', 'Buildings without an elevator' (selected), and 'Buildings with and without an elevator'.

There are also 'Primary Reviewer Comments' and 'Final Reviewer Comments' sections, each with an 'Add Comment' button.

At the bottom, there is a text input field for 'Enter the number of Assisted Units in buildings WITHOUT an elevator' with the value '50' entered.

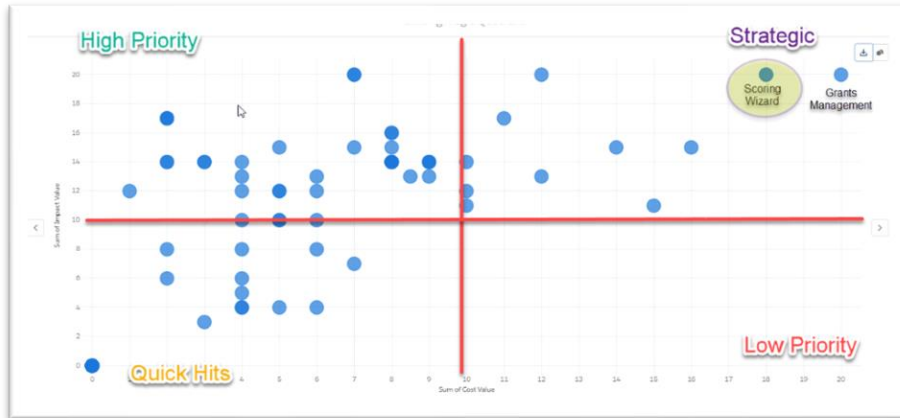
- **Scoring Wizard/Review Process – Point comparison allows the reviewer to see how their changes compare to the developer and the other reviewer(s)**

**POINTS SUMMARY**

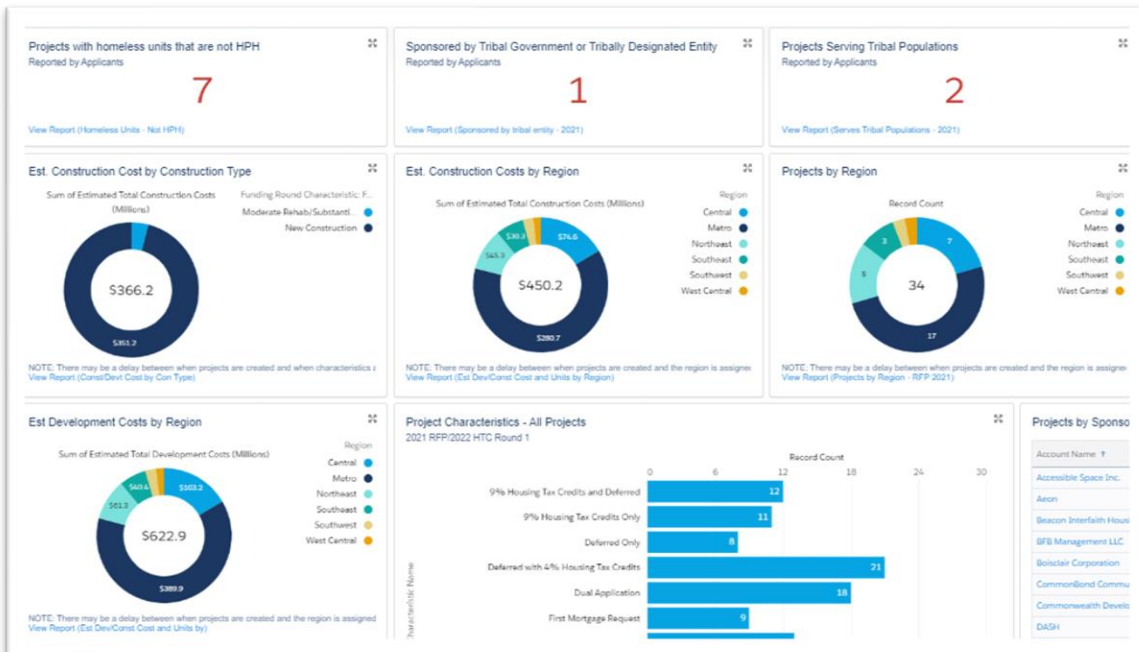
	Developer	Initial Review
<b>Greatest Need Tenant Targeting</b>	37	27
Large Family Housing - 2 to 5 bedrooms	12	12
Data used: Assisted Units by Size grid AND selection for Restricted to a Particular Age Group		
Large Family Housing - 4+ Bedrooms	3	3
Data used: Assisted Units by Size grid AND selection for Restricted to a Particular Age Group		
Senior Housing	0	0
Data used: Senior Assisted Units grid AND selection for Restricted to a Particular Age Group		
Senior Housing - 30% MTSP Income Limit	0	0
Data used: Senior Assisted Units grid AND selection for Restricted to a Particular Age Group		
Permanent Supportive Housing for High Priority Homeless (HPH)	10	10
Data used: HPH Units grid		
Continuum of Care	2	2
Data used: Greatest Need Tenant Targeting Units grid AND Total Units grid AND Continuum of Care Priority Type		
People with Disabilities Tier 1	10	0
Data used: Greatest Need Tenant Targeting Units grid AND Total Units grid AND selection for Restricted to a Particular Age Group		
People with Disabilities Tier 2	0	0
Data used: Greatest Need Tenant Targeting Units grid AND Total Units grid AND HPH Units grid AND selection for Restricted to a Particular Age Group		
<b>Serves Lowest Income for Long Durations</b>	32	29
Preservation	0	0
Data used: Total Units grid AND Preservation grid AND Preservation Threshold AND Preservation Tier		
Rental Assistance	16	16
Data used: Total Units grid AND Rental Assistance grid		
Further Restricting Rental Assistance	4	4
Data used: Total Units grid AND Rental Assistance grid		
Serves Lowest Income Tenants/Rent Reduction affordable to households at 50% MTSP Income Limit	n	n

Navigation buttons: << Previous, Verify Only, Verify & Submit, Save & Close

- **Prioritization Process** – magic quadrant for prioritizing projects based on cost/impact



- **Dashboards and Reporting** – what good is a system if your users don't have easy access to report on the data and display it in an impactful way with professional dashboards?



Report: Projects and Funding Round  
**Est Dev/Const Cost and Units by Region**  
 Displays the development and construction costs by region

Total Records: 34    Total Number of Units: 2,087    Total Estimated Total Developm...: \$622,858,879    Total Estimated Total Constructi...: \$450,228,339

Region	Project Name	Number of Units	Estimated Total Development Costs	Estimated Total Construction Costs
Central (7)	Hillside Heights Apartments	51	\$16,269,555	\$12,967,775
	Isle View Apartments	41	\$5,741,107	\$1,983,464
	Cambridge Apartments	65	\$18,972,318	\$13,031,948
	Marketplace Crossing	60	\$16,283,200	\$11,150,000
	Big Lake Station-Senior	74	\$19,729,109	\$15,583,000
	Lake Crossing Apartments	60	\$16,000,000	\$11,000,000
	Mission Creek Estates	44	\$10,252,396	\$8,916,796
<b>Subtotal</b>		<b>395</b>	<b>\$103,247,685</b>	<b>\$74,632,983</b>
Metro (17)	Gladstone Village	79	\$26,264,777	\$17,775,000
	Wadswag Commons	32	\$12,691,799	\$9,087,229
	Plymouth Avenue Apartments	61	\$16,359,818	\$11,261,514
	Emerson Village	40	\$17,278,000	\$12,218,575
	Hillside Terrace Apartments	44	\$12,653,705	\$4,446,000

Row Counts     Detail Rows     Subtotals     Grand Total