

The Trouble with Tradition, Making a Cultural Change

Nebraska Investment Finance Authority
Management Innovation: Internal Operations

HFA Staff Contact

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Cultural Change - After 27 years, the executive director of the Nebraska Investment Finance Authority (NIFA) retired, and Shannon Harner was hired as the organization's new leader. Assuming her role in 2020, Ms. Harner quickly recognized that NIFA had an outdated mission statement and needed to identify its core values.

NIFA has a staff of 29 across seven departments: Accounting & Administration, Beginning Farmer and Rancher, Community Engagement, Finance, Low-Income Housing Tax Credit Allocation & Compliance, Homeownership, and Marketing. While the staff of NIFA is small, the departments were very siloed and lacked agency-wide strategic objectives. In fact, departments were often competing for resources to start new programs or enhance existing ones.

Ms. Harner and the staff set out to change the culture at NIFA and started out with three agency-wide goals: strategic planning, updating the mission statement which included establishing core values, and conflict resolution. These three goals would become the foundation on which future agency improvement would be achieved.

Innovative Change - NIFA took a unique step by utilizing the *4 Disciplines of Execution (4DX)*, a method tailored to sales and production and was able to transform it to fit our agency goals and objectives. This would provide a foundation for the change in culture NIFA was working towards.

Chris McChesney, Sean Covey, and Jim Huling developed *4DX* to help organizations identify and achieve their Wildly Important Goals (WIGs). Because the best intentions can get lost in the daily whirlwind, 4DX allows us to tackle the strategy and execution gap between our daily to-do items and the larger strategic goals of the agency. We found that the primary reason we failed to execute our goals is because our whirlwind responsibilities got in the way.

Identifying our overall agency WIGs and how each department and staff member could play a role in achieving that goal was challenging. The process began with an all-staff meeting, where we discussed what we wanted to accomplish over the upcoming year and determined our agency WIG. Next, each staff member determined how they would assist in advancing the agency-wide goals within their department.

Developing the WIG - We began by identifying three areas for improvement. We were challenged throughout the year as we adjusted to new protocols and procedures and in the end, we felt more invested in the agency and its goals. This made it easier to identify goals for the following year. The 4DX method helped us narrow our focus from a multitude of scattered objectives to just one goal. Once the agency goal was set, each

department determined how they would meet the agency-wide goal by identifying no more than three WIGs for the year.

Since we started this cultural change, we have accomplished two agency-wide WIGs:

1. Increase Measurable Collaboration and Communication Through Effective Engagement (completed in year one)
2. Identify and Streamline at Least One Key Process in Each Department to Move Towards Achieving NIFA's 3-5 year vision (in process for year two)

Per 4DX, each department developed a scoreboard with clearly defined objectives, measurements, and completion dates. We used the scoreboards to stay on track and hold each other accountable. They were instantly recognizable, so we could see at a glance the progress we made toward our goals. Demonstrating our creativity, the scoreboards helped us learn more about each department's programs.

Defining our Future - NIFA's mission statement was outdated and did not reflect our fundamental objectives. To help us address this, we hired a consultant who assisted us with determining our core values. With those in hand we worked with her to craft a meaningful mission statement to better represent our primary focus. From there, we established clear 3-5 year and 10-year visions.

NIFA Mission Statement: Growing Nebraska communities through affordable housing and agribusiness.

NIFA Vision Statements:

1. (3-5 year) NIFA leverages its resources, data, knowledge, and technology, with effective statewide partnerships and collaboration, to promote vibrant Nebraska communities through affordable housing solutions and agribusiness.
2. (10 year) NIFA is an indispensable partner for Nebraska citizens and communities in planning, creating, and sustaining affordable housing, advancing agribusiness, and furthering a vibrant Nebraska.

The consultant worked to establish a commonality with staff by humorous engagement activities, motivational interviewing techniques and encouraging participation from every single staff member as well as NIFA board members. The focus of our newly created mission and vision statements guide us in a unified direction and defines our commitment to Nebraskans.

Staff Education and Peer Interaction – Throughout the implementation of the 4DX program, the staff struggled with the engrained practice of siloed departments that previously had little inter-departmental interaction and engagement. To enhance both communication and staff culture, NIFA hired a human resource firm to provide customized all-staff trainings, including personality tests and conflict resolution. This engaged the staff in new ways by providing personal insight and education on how we could better interact with one another. These educational opportunities facilitated conversations across the departments, moving us beyond our silos. We all took the “DiSC” personality test and shared the results in a group discussion. We learned about our communication styles and how to engage more effectively with each other. This increased understanding of our individual personalities and those of our coworkers has improved staff communication and encourages agency collaboration and support.

Replicable & Benefits that Outweigh Costs – While we combined three different strategies to achieve our goals, they are all replicable to any agency. HR firms and communication consultants are readily available, and the *4 Disciplines of Execution* can be found in bookstores and online. Ultimately, while there was guidance, this cultural change was led by and accomplished through the hard work of the NIFA staff.

Accomplishments – We accomplished our initial WIG, which was to increase measurable collaboration and communication through effective engagement. NIFA staff worked together to craft a mission statement that accurately expresses our agency focus in one sentence. We also adopted five core values: Commitment, Integrity, Collaboration, Innovation, and Stewardship. In addition, we established weekly executive communication with the NIFA board of directors.

The agency-wide WIG for 2022 is to identify and streamline at least one key process in each department by June 30, 2022, fostering the achievement of our 3-5 year vision. Both the Community Engagement and Beginning Farmer and Rancher departments have completed their WIGs and the remaining five departments are on schedule to complete them by the end of the fiscal year.

Conclusion - This operational management process has not only made the staff more cohesive but highlights how the agency cannot achieve its strategic objectives without strengthening internal operations through the participation of each and every member of the staff. Change can be hard, but change can also bring new ideas, reignite the staff’s passion for their work, and improve the operations of the organization. We will continue to use these new tools to guide our work and believe that other HFA’s can benefit from a similar approach that can be tailored to their organization.

Exhibit 1: **Innovative Change – Department WIGs**

Accounting & Administration – To develop and implement clear guidelines, process and procedures for staff requests and general office spending.

Beginning Farmer and Rancher – Develop program marketing materials and informational video for relevant audiences.

Community Engagement – Increase reporting compliance in the Housing Study Grant Program, increase communication with partners program members through the Engage platform, and update policies and procedures to accomplish hybrid Conference.

Finance – Convert the manual check process to electronic payments.

Homeownership – reduce second mortgage document errors, allowing the loan to go through without NIFA staff returning to the lender and borrower for additional information.

LIHTC Allocation – Using the Engage platform as the primary communication source. It will be integrated with the Microsoft Teams platform to allow for the exchange of information between NIFA and the development community.

LIHTC Compliance – Determine needs, explore software vendors and analyze against current vendor to determine the right software compliance monitoring for NIFA. Improve the current process of uploading digital documentation to ensure increased efficiency. Approve the use of digital signatures for project documentation. To achieve this, the team evaluated current processes, researched uploading options and will launch a tool.

Marketing – Review each department's website documents and update them to comply with the new branding requirements. In order to accomplish this, they started with three departments: Homeownership, Beginning Farmer and Rancher, and Tax Credit.

HFA: Nebraska Investment Finance Authority
Entry Name: The Trouble with Tradition, Making a Cultural Change
Category\Subcategory: Management Innovation\Internal Operations

Exhibit 2: **Innovative Change – Department Scoreboards**

Accounting & Administration Team WIG/Lead Measures Scoreboard

LEAD MEASURE 1: Gather Information about applicable spending to be reviewed

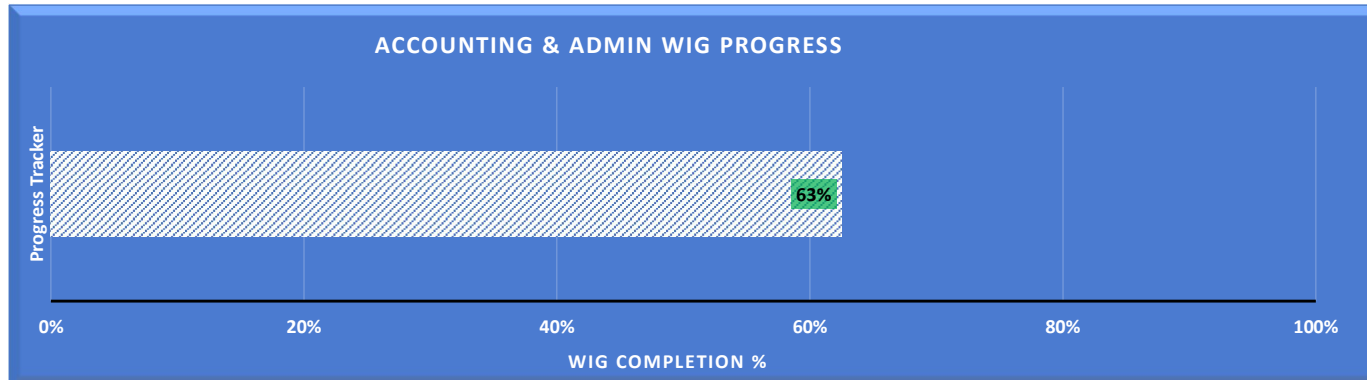
- - Request prior year supply list from Eakes
- - Analyze supply list
- - Initial cost comparison between vendors
- - Review expense accounts / budget (other purchases)
- - Create a standard inventory list
- - Create an inventory tracking process

Lead Measure 2: Create Guidelines for spending requests

- - Provide written communication to staff outlining process
- - Provide quarterly updates to staff on year-to-date spending

WIG

- Develop and Implement clear guidelines, processes and procedures for staff requests and general office spending by June 30, 2022



Today's Date 5/4/2022






Lead Measure 1: Gather Information about applicable spending to be reviewed

Check if Complete	Action Items	Due Date	Date Completed	Completed TRUE/FALSE
<input checked="" type="checkbox"/>	- Request prior year supply list from Eakes	9/15/2021	9/15/2021	TRUE
<input checked="" type="checkbox"/>	- Categorize supply list	10/15/2021	10/7/2021	TRUE
<input checked="" type="checkbox"/>	- Review expense accounts / budget (other supply purchases)	10/15/2021	10/1/2021	TRUE
<input checked="" type="checkbox"/>	- Initial cost comparison between vendors - Eakes, OfficeMax, Staples	11/15/2021	11/15/2021	TRUE
<input checked="" type="checkbox"/>	- Create a standard inventory list	1/31/2022	1/28/2022	TRUE
<input type="checkbox"/>	- Create an inventory tracking process	5/31/2022		FALSE

TRUE	FALSE	TOTAL	PROGRESS
5	3	8	63%

Lead Measure 2: Create Guidelines for spending requests

Check if Complete	Action Items	Due Date	Date Completed	Completed TRUE/FALSE
<input type="checkbox"/>	- Provide written communication to staff outlining process	6/30/2022		FALSE
<input type="checkbox"/>	- Create quarterly report to update staff on year-to-date spending	6/30/2022		FALSE

KEY - DATE DUE VS DATE COMPLETED	
Past Due	
Completed	
Due in 30 days	
Due in >30 but <90 days	
Due in more than 90 days	

WIG: Develop program marketing materials and information video for relevant audiences



8/15

8/30

9/15

9/30

10/15

10/30

11/15

11/30

1/15

3/15

Coordinate
strategy
with
Marketing

Identify
relevant
constituents

Gather
appropriate
information
for recorded
presentation

Begin
creating
presentation

Achieve 1/4
completion
of video

Achieve 1/2
completion
of video

Achieve 3/4
completion
of video

Finalize
presentation

Obtain
approval by
admin

Post to NIFA
website and
email promo
to
subscribed
audience

INCREASE REPORTING COMPLIANCE IN THE HOUSING STUDY GRANT PROGRAM

from 25% to 75% by December 31, 2021

Create & Implement usage of quarterly report form by grantees

Assess your current financial state

Increase NIFA's ability to obtain clear and consistent housing information for grantees

Create online summary form for applicants



July

Aug

Sept

Oct

Nov

Increase process efficiency & understanding of applicants

Review application & scoring process - make necessary changes

Create & Implement usage of quarterly report form by grantees

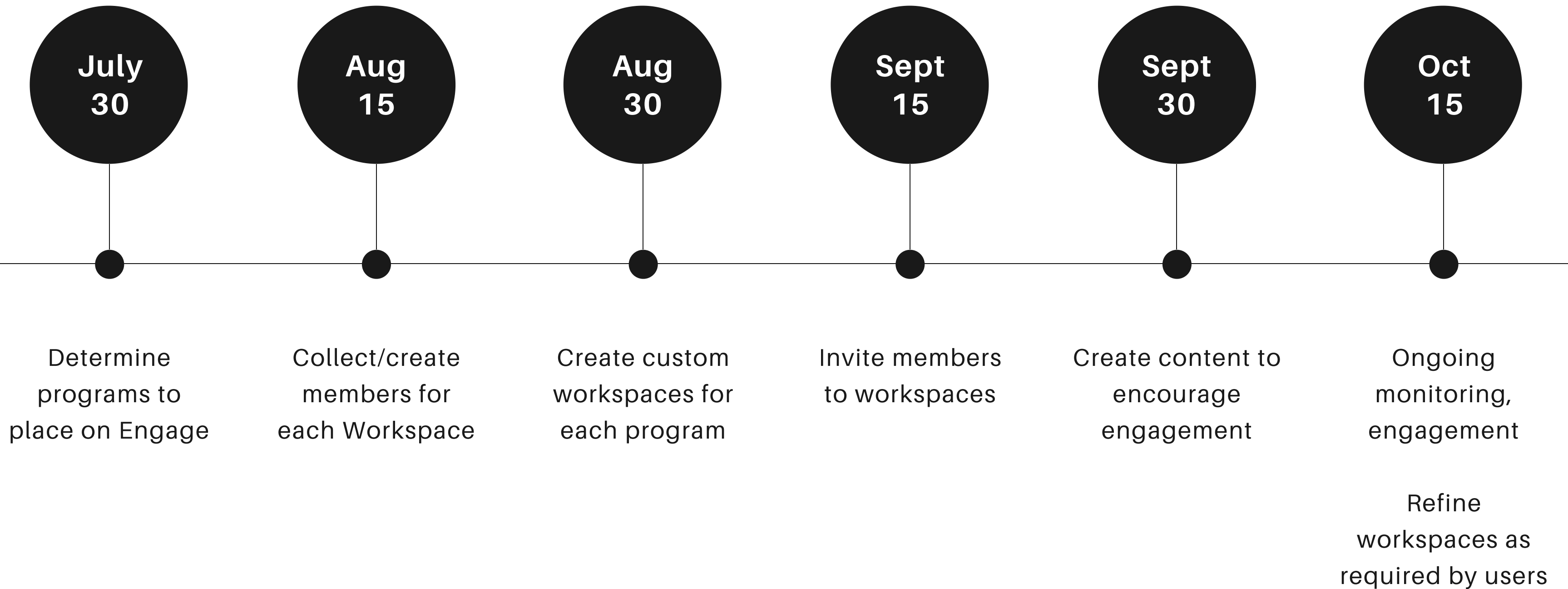
Implement quarterly report notification

Increase NIFA's ability to obtain clear and consistent housing information for grantees

Create data visualization to show impact of program on Nebraska

ENGAGE PLATFORM

Increase communication with Partner Program members
from 0% to 50% by 12/31/21



CONFERENCE

Update policies/procedures to accomplish hybrid conference event March 2022

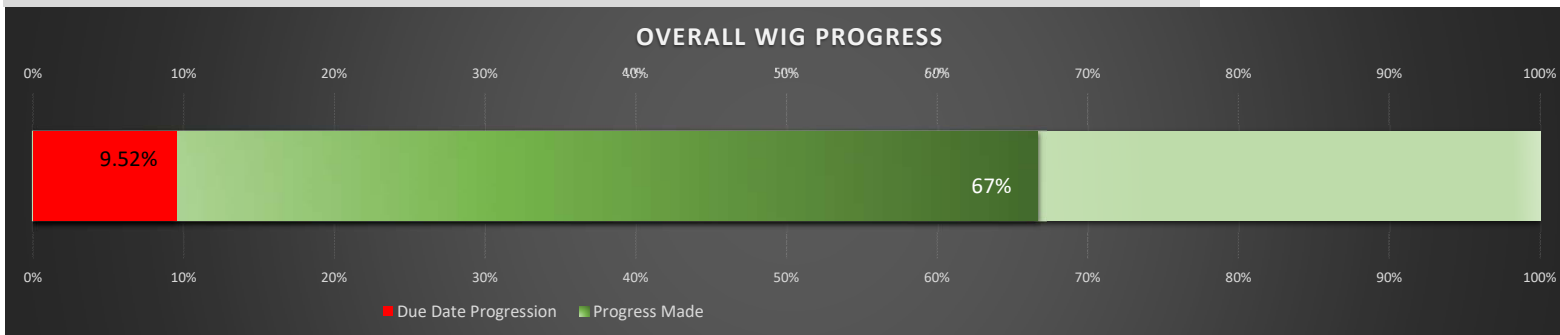


Finance WIG# 1	Status	Due Date	Date Completed	Progress
Convert the manual check process to electronic payments by 6/30	In Progress	6/30/2022		67%

4/28/2022

6/30/2022

9.52%



Lead Measures

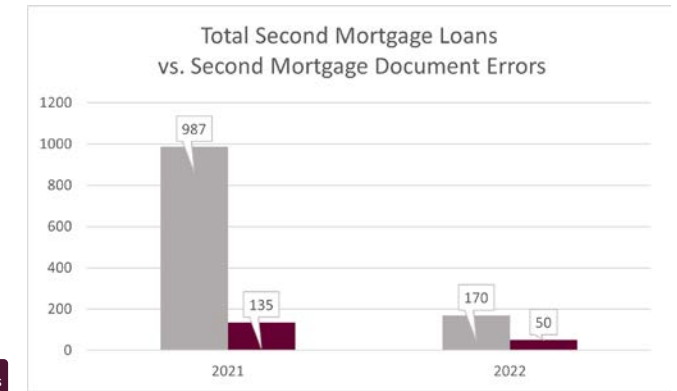
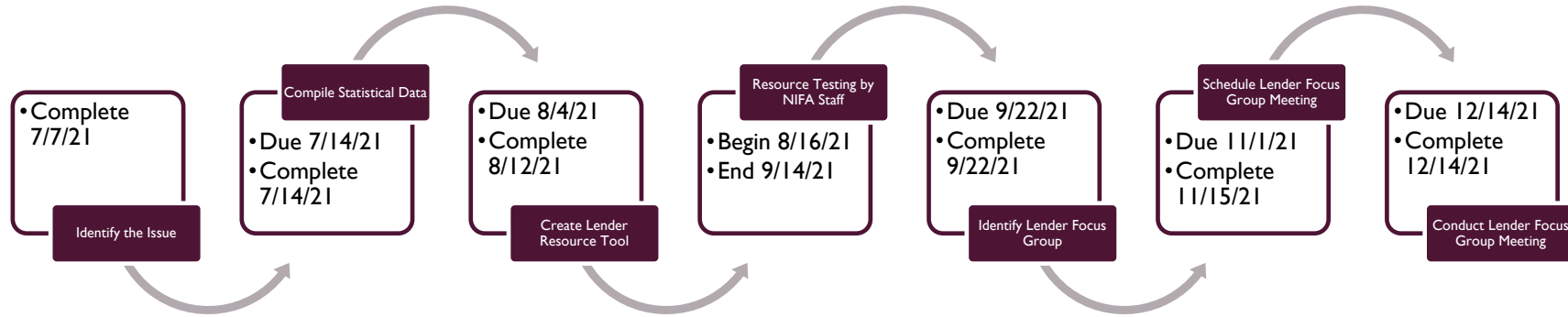
WIG #1: AP conversion

Lead Measure	Status	Due Date	Date Completed	Progress	Notes
Develop procedures for invoice processing and exporting Emphasys AP payment data	In Progress	6/30/2022		75%	reviewing information and costs to determine the cost of adding vendors to WF account for ACH payments. Contacted WF. Staying with UBT for AP or switching all to WF? Keeping both; we will have outliers to pay by check and then use WF for ACH
Determine the import template requirements for the electronic payment system	In Progress	6/30/2022		65%	ACH import Contacted WF. Working on template and system requirements etc. Steve reviewing packet for-
Gather necessary information from vendors and develop new vendor setup form	In Progress	6/30/2022		60%	Have vendor list. Contacting Iowa to find what info was necessary from vendors-Collecting ACH vendor information from Vendors; We will have some vendors that we will still pay by check. About 1/3 currently ACH

KEY - DATE DUE VS DATE COMPLETED	
Past Due	
Completed	
Due in 30 days	
Due in 60 days	
Due in more than 90 days	

SECOND MORTGAGE CLOSING DOCUMENT ERRORS

Agency WIG - Identify and streamline at least one key process in each department by 6/30/22 to move toward achievement of the 3 to 5-year Vision.

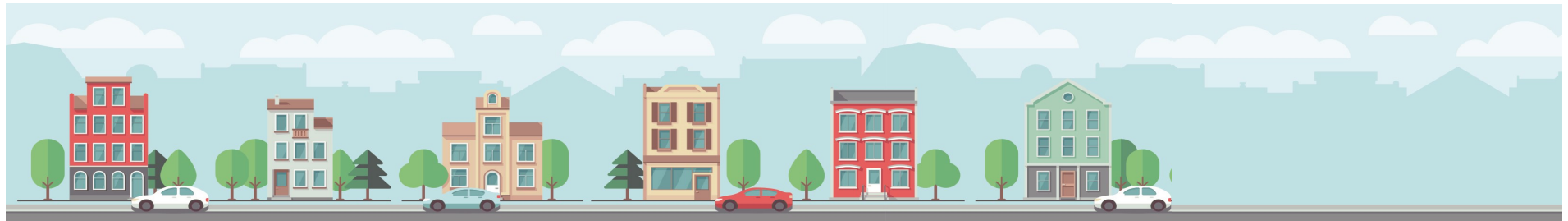


Result: Lender challenges identified (working from home, internal QC practices differ, how documents are produced)

NIFA Action Plan:

- Contact lender partners experiencing document completion obstacles
 - Provide education via phone/email
- Revise existing lender training materials to increase focus on second mortgage document requirements
- Additional resources (videos, training sessions) to be made available to lender partners by 6.30.22

LIHTC Allocation Scoreboard



11-30-2021	12-31-2021	1-31-2022	2-28-2022	3-31-2022	4-30-2022	5-31-2022	6-30-2022
Initial Discussion with Proteus for LIHTC Allocation Workspaces	Navigate the test environment and provide feedback to Proteus	Continue to provide feedback to Proteus regarding set-up of environment for Allocation	Meet with Proteus weekly to learn the system and work in test environment to set up modules and change the set-up to work with Allocation needs	Meet weekly with Proteus to make changes to modules, so we could begin finalizing modules	Meet weekly with Proteus to finalize modules. Make changes to modules and launch three workspaces for testing setup to determine any other changes needed before full roll out	Meet with Proteus to keep moving forward. Work with developments selected for testing the live workspaces to determine what other changes need to occur	Work with Proteus to make changes and roll out live workspaces for all developments receiving a conditional reservation at June Board meeting
-This was to provide information on needs for Allocation for the Engage platform	-A lot of questions were asked to determine the capabilities of the Engage platform	-Proteus contact was new and learning the platform and provided responses to questions about the capabilities of Engage	-Began creating the development Milestones in Proteus	-Finished creating development milestone modules, as Proteus continued to work on making changes for those modules	-Finished making changes to documents and created three development workspaces	-Stay in contact with developments to get feedback on platform. Work with Proteus to make necessary changes.	-Make necessary changes and create workspaces for developments receiving a conditional reservation in June
			-2/2/22 ✓	-3/2/22 ✓			
			-2/9/22 ✓	-3/9/22 ✓			
			-2/16/22 ✓	-3/16/22 ✓			
			-2/23/23 ✓	-3/23/22 ✓	-4/6/22 ✓		
			-2/28/22 ✓		-4/13/22 ✓		
					-4/20/22 ✓		
					-4/27/22 ✓		
						-5/4/22	-6/1/22
						-5/11/22	-6/8/22
						-5/18/22	-6/15/22
						-5/25/22	-6/29/22

TAX CREDIT COMPLIANCE 2021-22 WIG

Contact other State Agencies to explore what they use for software vendors.

Emphasys training and refresher on current system and demo of new modules.

Talked with David about our needs & wanting to pursue edocs and notification & workflow

LEAD: Evaluate our current software and compare to other software vendors.
LAG: Find reliable software that meets the needs of the Tax Credit

Determine needs, explore software vendors and analyze our current vendor against needs to determine the right software for our compliance monitoring needs by June 30, 2022

Contact other State Agencies to explore what they use for digital docs.

Summarize results from other state agencies in a spreadsheet.

Explore other options for digital uploads.

LEAD: Evaluate current process, research uploading options and launch tool.
LAG: Increase efficiency & timeliness of documentation submission.

talk to other state about their experience with edocs.

Met with David to discuss digital upload options, he is following up with Emphasys on Edocs

Improve the current process of uploading digital documentation to ensure increased efficiency by March 31, 2022

Review manuals and websites of other states

Contact other states about their policies/procedures

Draft a policy

LEAD: Develop and implement digital signature policy.
LAG: Streamlining application process for tenant and property management.

Review and edit policy

Submit for final review and approval

Implement policy and distribute accordingly



Approve the use of digital signatures for project documentation by December 31, 2021

Task	Responsible	Date assigned	Date due	Status	Date Completed
Week 1 7/27/21 - 8/2/21					
Create spreadsheet to track contacts for digital signatures	Tammy	7/27/2021	8/2/2021	100%	8/2/2021
research digital signature policies	Kelly	7/27/2021	8/2/2021	0%	
n/a- site inspections	Andray			n/a	
Contact three state agencies about digital docs	Eric	7/27/2021	8/2/2021	100%	7/30/2021
	Sheila				
Week 2 8/3/21 - 8/9/21					
Create list of questions and contacts for digital signatures	Tammy	8/3/2021	8/9/2021	100%	8/6/2021
research 5 states' digital signature policies	Kelly	8/3/2021	8/9/2021	100%	8/9/2021
n/a - site inspections	Andray			0%	
Off	Eric	N/A	N/A	N/A	N/A
	Sheila				
Emailed 2 states about digital docs	Lucas	8/3/2021	8/9/2021	100%	8/6/2021
Week 3 8/10/21 - 8/16/21					
Off	Tammy	N/A	N/A	N/A	N/A
research 5 states digital signature policies	Kelly	8/10/2021	8/16/2021	75%	8/17/2021
step by step inspection process checklist	Andray	8/10/2021	8/16/2021	0%	
Contact two more state agencies about digital docs	Eric	8/10/2021	8/16/2021	100%	8/11/2021
Esign versus docuSign	Sheila	8/20/2021	8/16/2021	100%	8/13/2021
Off	Lucas	N/A	N/A	N/A	N/A
Week 4 8/17/21 - 8/23/21					
Email states questions on digital signatures	Tammy	8/17/2021	8/23/2021	100%	8/23/2021
research the last states	Kelly	8/17/2021	8/23/2021	100%	8/20/2021
step by step inspection process checklist	Andray	8/17/2021	8/23/2021	50%	
Summarize the three responses rec'd for digital docs	Eric	8/17/2021	8/23/2021	100%	8/23/2021
Review SF digital signature policy with Jacki	Sheila	8/17/2021	8/23/2021	100%	8/24/2021
Followed-up with ND & SD, contacted WY about digital docs	Lucas	8/17/2021	8/23/2021	100%	8/20/2021
Week 5 8/24/21 - 8/30/21					
Work with Kelly to review information we have gathered and start a list of ideas of what we want to include in our policy	Tammy	8/24/2021	8/30/2021	100%	8/30/2021
Get with Tammy to review info we received from other states & email MHEG	Kelly	8/24/2021	8/30/2021	100%	8/30/2021
step by step guide, reach out to 5 states regarding digital docs	Andray	8/24/2021	8/30/2021	100%	8/30/2021
Investigate companies providing digital docs software to other state agencies	Eric	8/24/2021	8/30/2021	100%	8/27/2021
Further research on esignatures and HUD policy	Sheila	8/24/2021	8/30/2021	100%	8/27/2021
Contact 3 states about digital docs - KS, MI, UT	Lucas	8/24/2021	8/30/2021	100%	8/26/2021
Week 6 8/31/21 - 9/6/21					
Work with Kelly to come up with email of questions to ask Shannon and look at e-sign act and UETA	Tammy	8/31/2021	9/6/2021	0%	9/10/2021
work with Tammy to come up with email questions to ask Shannon, look over esign act and UETA	Kelly	8/31/2021	9/6/2021	0%	9/10/2021
Reach out to atleast 7 more states regarding their process of uploading documents	Andray	8/31/2021	9/6/2021	100%	9/5/2021
Investigate if there are other types of digital doc systems out there for other possible options	Eric	8/31/2021	9/6/2021	100%	9/3/2021
Work on making review forms fillable	Sheila	8/31/2021	9/6/2021		
follow-up with states I have already contacted and summarize responses	Lucas	8/31/2021	9/6/2021	100%	9/2/2021
Week 7 9/7/21 - 9/13/21					
Work with Kelly to finish last weeks Wig and work through questions with Robin	Tammy	9/7/2021	9/13/2021	100%	9/10/2021
Work with Tammy to finish last weeks Wig and work through questions with Robin	Kelly	9/7/2021	9/13/2021	100%	9/10/2021
Follow-up on emails sent that I'm still awaiting responses and research program developers who can provide info .	Andray	9/7/2021	9/13/2021	25%	
Review Master Project List for possible additional tabs	Eric	9/7/2021	9/13/2021	100%	9/10/2021
Meet with Tammy discuss forms to make fillable and create forms	Sheila	9/7/2021	9/13/2021	100%	9/10/2021
Reach out to Julie Anderson from SD to get contacts from other state agencies who will reply back to questionnaire.	Lucas	9/7/2021	9/13/2021	100%	9/10/2021
Week 8 9/14/21 - 9/20/21					
work with Kelly on the first half of CH5 of manual	Tammy	9/14/2021	9/20/2021	100%	9/20/2021
work with Tammy on the first half of CH5 manual	Kelly	9/14/2021	9/20/2021	100%	9/20/2021
Follow-up on emails sent that I'm still awaiting responses & meet with Eric and research program developers who can provide info .	Andray	9/14/2021	9/20/2021	100%	9/20/2021
Contact WSHFC (Lanakay Lipp) concerning Laserfiche Digital Doc System	Eric	9/14/2021	9/20/2021	100%	9/17/2021
Create forms - changing fonts 10 per week	Sheila	9/14/2021	9/20/2021	0%	
contact Nefi Gamez from Utah about using eDocs	Lucas	9/14/2021	9/20/2021	100%	9/16/2021
Week 8 9/21/21 - 9/27/21					
make changes to forms and send Kelly a list	Tammy	9/21/2021	9/27/2021	100%	9/22/2021
send email to emphasys & work on forms for marketing	Kelly	9/21/2021	9/27/2021	100%	9/27/2021
Start a list of what we want software to do and what software should do	Andray	9/21/2021	9/27/2021	100%	9/27/2021
Gather more info about Laserfiche from internet	Eric	9/21/2021	9/27/2021	100%	9/24/2021
Create internal fillable forms and update existing forms	Sheila	9/21/2021	9/27/2021	50%	
add tip sheet help under 'for your information' on Exhibit A	Lucas	9/21/2021	9/27/2021	50%	
Week 9 9/28/21 - 10/4/21					
Make changes to forms and put in folder to get ready for final approval	Tammy	9/28/2021	10/4/2021	100%	10/4/2021
	Kelly	9/28/2021	10/4/2021		
Collaborate w/Susan Pulac to come up with a fill-in-able questionnaire for staff to complete regarding software needs and wants.	Andray	9/28/2021	10/4/2021	100%	

Create a list of info to possibly add to memos in AOD to streamline reviews	Eric	9/28/2021	10/4/2021	100%	10/1/2021
Create internal fillable forms and update existing forms	Sheila	9/28/2021	10/4/2021	100%	10/1/2021
	Lucas	9/28/2021	10/4/2021		

Week 10 10/5/21 - 10/11/21

Review and finalize changes to Chapter 5 of the manual	Tammy	10/5/2021	10/11/2021	100%	10/6/2021
Review and finalize changes to chapter 5 of the manual	Kelly	10/5/2021	10/11/2021	100%	10/6/2021
Compiled the results and emailed to Kelly & Tammy	Andray	10/5/2021	10/11/2021	75%	10/12/2021
Enter memos in AOD for projects with USDA MINC Reports	Eric	10/5/2021	10/11/2021	100%	10/8/2021
Create Exhibit A - non-compliance vs. avoiding future non-compliance list	Sheila	10/5/2021	10/11/2021	10%	10/11/2021
example of e-signature	Lucas	10/5/2021	10/11/2021	100%	10/8/2021

Week 11 10/12/21 - 10/18/21

Review first half of chapter 6 of annual and set up meeting with marketing to go over changes to forms	Tammy	10/12/2021	10/18/2021	100%	10/15/2021
Review Chapter 6 with Tammy	Kelly	10/12/2021	10/18/2021	100%	10/15/2021
Compile a list of software vendors that will meet the departments basic needs	Andray	10/12/2021	10/18/2021	100%	10/18/2021
Review common issues for possible entry into AOD Memos	Eric	10/12/2021	10/18/2021	100%	10/15/2021
Create Exhibit A - non-compliance vs. avoiding future non-compliance list	Sheila	10/12/2021	10/18/2021	20%	10/18/2021
fix half of district 2/3 Ex A mistakes noticed by Sheila	Lucas	10/12/2021	10/18/2021	100%	10/18/2021

Week 12 10/19/21 - 10/25/21

Review Chapter 8 of manual and start on the FAQ's list with Kelly	Tammy	10/19/2021	10/25/2021	100%	10/22/2021
Ch 8 of manual and start on FAQs with Tammy	Kelly	10/19/2021	10/25/2021	100%	10/22/2021
Research SharePoint information to determine if it would be a viable tool for our department to use.	Andray	10/19/2021	10/25/2021	15%	10/26/2021
Review amenities for possible entry into AOD Memos	Eric	10/19/2021	10/25/2021	0%	10/26/2021
Create Exhibit A - non-compliance vs. avoiding future non-compliance list	Sheila	10/19/2021	10/25/2021	30%	10/25/2021
contact MultiSite Systmes to compare vs Emphasys	Lucas	10/19/2021	10/25/2021	100%	10/25/2021

Week 13 10/26/21 - 11/1/21

Finish FAQs, read through manual and email to Shannon and Robin	Tammy	10/26/2021	11/1/2021	50%	11/4/2021
Finish FAQs	Kelly	10/26/2021	11/1/2021	50%	11/4/2021
Continue to research SharePoint information to determine if it would be a viable tool for our department to use.	Andray	10/26/2021	11/1/2021	100%	11/1/2021
Review 50 project eval sheets for possible AOD memos/enter memos	Eric	10/26/2021	11/1/2021	100%	10/28/2021
Create Exhibit A - non-compliance vs. avoiding future non-compliance list	Sheila	10/26/2021	11/1/2021	50%	
Reach out to property managers for training	Lucas	10/26/2021	11/1/2021	100%	10/27/2021

Week 14 11/2/21 - 11/8/21

Finish the final read through of manual and send to Shannon and Robin and go through information gathered on digital upload software	Tammy	11/2/2021	11/8/2021	100%	11/8/2021
Finish the final read through of manual and send to Shannon and Robin and go through information gathered on digital upload software	Kelly	11/2/2021	11/8/2021	100%	11/8/2021
	Andray	11/2/2021	11/8/2021		
Review 50 more project eval sheets for possible AOD memos/enter memos	Eric	11/2/2021	11/8/2021	100%	11/5/2021
Create Exhibit A - non-compliance vs. avoiding future non-compliance list	Sheila	11/2/2021	11/8/2021	90%	11/5/2021
Research Entrata property management software	Lucas	11/2/2021	11/8/2021	100%	11/5/2021

Week 15 11/9/21 - 11/15/21

look over emails in WIG folder & contact states that have emphasisys	Tammy	11/9/2021	11/15/2021	100%	11/15/2021
look over emails in WIG folder & contact states that have emphasisys	Kelly	11/9/2021	11/15/2021	100%	11/15/2021
Continue Researching SharePoint Pros/Cons	Andray	11/9/2021	11/15/2021	100%	11/15/2021
Review 50 more project eval sheets for possible AOD memos/enter memos	Eric	11/9/2021	11/15/2021	100%	11/10/2021
Finish - non-compliance vs. avoiding future non-compliance list	Sheila	11/9/2021	11/15/2021	100%	11/13/2021
	Lucas	11/9/2021	11/15/2021	0%	

Week 16 11/16/21 - 11/22/21

Look more at Emphasys and edocs, meet with Nefi for a demonstration of how they are using edocs	Tammy	11/16/2021	11/22/2021	100%	11/22/2021
Look more at Emphasys and edocs, meet with Nefi for a demonstration of how they are using edocs	Kelly	11/16/2021	11/22/2021	100%	11/22/2021
Research other companies for uploading digital documentation	Andray	11/16/2021	11/22/2021	100%	11/22/2021
Review 50 more project eval sheets for possible AOD memos/enter memos	Eric	11/16/2021	11/22/2021	100%	11/17/2021
	Sheila	11/16/2021	11/22/2021		
created list of property managers that would benefit from CP training	Lucas	11/16/2021	11/22/2021	100%	11/19/2021

Week 17 11/23/21 - 11/29/21

THANKSGIVING WEEK - No WIG

Week 18 11/30/21 - 12/6/21

Meet with Single family and see how they use edocs and review verification forms that marketing has completed	Tammy	11/30/2021	12/6/2021	50%	
Meet with Single family and see how they use edocs and review verification forms that marketing has completed	Kelly	11/30/2021	12/6/2021	50%	
To compile a list of the companies that would possibly work for our department	Andray	11/30/2021	12/6/2021	100%	12/6/2021

Review 50 more project eval sheets for possible AOD memos/enter memos	Eric	11/30/2021	12/6/2021	100%	12/3/2021
	Sheila	11/30/2021	12/6/2021		
Reached out to Emphasys to discuss AMI report	Lucas	11/30/2021	12/6/2021	100%	12/3/2021

Week 19 12/7/21 - 12/13/21

Review Forms	Tammy	12/7/2021	12/13/2021	75%	
Review Forms	Kelly	12/7/2021	12/13/2021	75%	
Go through at least 4 companies that are on the list compiled and write out why I feel they would be a good fit for our department	Andray	12/7/2021	12/13/2021	50%	
Review 50 more project eval sheets for possible AOD memos/enter memos	Eric	12/7/2021	12/13/2021	100%	12/9/2021
	Sheila	12/7/2021	12/13/2021		
	Lucas	12/7/2021	12/13/2021		

Week 20 12/14/21 - 12/20/21

Review and finalize forms and accept changes to manual as they come in	Tammy	12/14/2021	12/20/2021		
Review and finalize forms and accept changes to manual as they come in	Kelly	12/14/2021	12/20/2021		
Submit the 4 companies I stated I would complete plus complete at least one additional company write-up	Andray	12/14/2021	12/20/2021		
Review the last 55 projects' eval sheets for possible AOD memos/enter memos	Eric	12/14/2021	12/20/2021	100%	12/16/2021
	Sheila	12/14/2021	12/20/2021		
follow-up with Emphasys and get someone to work with me directly	Lucas	12/14/2021	12/20/2021	100%	12/20/2021

Week 21 12/21/21 - 12/27/21 (Christmas Week)

No WIGS

Week 22 12/28/21 - 1/3/22 (New Year's Week)

No WIGS

Week 23 1/4/22 - 1/10/22

Continue to work on forms and manual with Kelly	Tammy	1/4/2022	1/10/2022		
n/a - out	Kelly	1/4/2022	1/10/2022		
	Andray	1/4/2022	1/10/2022		
No WIG	Eric	1/4/2022	1/10/2022	0%	1/10/2022
Finish the cost cert vs AOD template	Sheila	1/4/2022	1/10/2022		
Set up phone conversation with Lisa from Emphasys; Re: AMI calculation	Lucas	1/4/2022	1/10/2022		

Week 24 1/11/22 - 1/17/22

Continue to work on forms and manual with Kelly	Tammy	1/11/2022	1/17/2022		
Work on forms with Tammy	Kelly	1/11/2022	1/17/2022	100%	1/14/2022
Research last 2 companies and list which I feel would be a good fit for our department and why	Andray	1/11/2022	1/14/2022	100%	1/17/2022
Review SS of 50 projects to clarify sves and check if past violations are corrected by subsequent submissions.	Eric	1/11/2022	1/17/2022	100%	1/14/2022
	Sheila	1/11/2022	1/17/2022		
discuss generating AMI report with Lisa and Roland of Emphasys	Lucas	1/11/2022	1/17/2022	0%	

Week 25 1/18/22 - 1/24/22

Review final changes forms	Tammy	1/18/2022	1/24/2022		
look at revised forms from marketing	Kelly	1/18/2022	1/24/2022	100%	1/24/2022
Condense Processes	Andray	1/18/2022	1/24/2022	50%	
Review SS of 50 more projects to clarify sves and check if past violations are corrected by subsequent submissions.	Eric	1/18/2022	1/24/2022	100%	1/21/2022
	Sheila	1/18/2022	1/24/2022		
	Lucas	1/18/2022	1/24/2022		

Week 26 1/25/22 - 1/31/22

Work with Sheila on the audit technique guide- 1st step determining the sections that will be included	Tammy	1/25/2022	1/31/2022	100%	1/31/2022
work with emphasys to come up with a game plan for tickets	Kelly	1/25/2022	1/31/2022	100%	1/31/2022
	Andray	1/25/2022	1/31/2022		
Review SS of 50 more projects to clarify sves and check if past violations are corrected by subsequent submissions.	Eric	1/25/2022	1/31/2022	100%	1/29/2022
Annual Review Guide - work with Tammy	Sheila	1/25/2022	1/31/2022	100%	1/31/2022
	Lucas	1/25/2022	1/31/2022		

Week 27 2/1/22 - 2/7/22

Work with Sheila to complete the first section of the now renamed annual review processes guide	Tammy	2/1/2022	2/7/2022	100%	2/7/2022
work with emphasys	Kelly	2/1/2022	2/7/2022	100%	2/7/2022
	Andray	2/1/2022	2/7/2022		
Review SS of 50 more projects to clarify sves and check if past violations are corrected by subsequent submissions.	Eric	2/1/2022	2/7/2022	100%	2/4/2022
Annual Review Guide - work with Tammy	Sheila	2/1/2022	2/7/2022	100%	2/7/2022
	Lucas	2/1/2022	2/7/2022		

Week 28 2/8/22 - 2/14/22

Work on section 2 of the annual review processes guide with Sheila	Tammy	2/8/2022	2/14/2022	100%	2/14/2022
work on pain point checklist	Kelly	2/8/2022	2/14/2022	100%	2/14/2022
	Andray	2/8/2022	2/14/2022		
Review SS of 50 more projects to clarify sves and check if past violations are corrected by subsequent submissions.	Eric	2/8/2022	2/14/2022	100%	2/11/2022

Annual Review Guide - work with Tammy	Sheila	2/8/2022	2/14/2022	100%	2/14/2022
	Lucas	2/8/2022	2/14/2022		
Week 29 2/15/22 - 2/21/22					
Work on Section 3 of the annual review processes guide with Sheila	Tammy	2/22/2022	2/28/2022	100%	2/21/2022
continue pain points and questions for emphasys	Kelly	2/22/2022	2/28/2022	100%	2/24/2022
	Andray	2/22/2022	2/28/2022		
Review SS of 50 more projects to clarify sves and check if past violations are corrected by subsequent submissions.	Eric	2/22/2022	2/28/2022	100%	2/18/2022
Annual Review Guide - work with Tammy	Sheila	2/22/2022	2/28/2022	100%	2/21/2022
	Lucas	2/22/2022	2/28/2022		
Week 30 2/22/22 - 2/28/22 NO MEETING (Emphasys Mtgs)					
Week 31 3/1/22 - 3/7/22					
Work with Sheila on Section 4 of the annual review processes guide	Tammy	3/1/2022	3/7/2022	100%	3/7/2022
work on COVID checklists	Kelly	3/1/2022	3/7/2022	100%	3/7/2022
	Andray	3/1/2022	3/7/2022		
Review SS of 50 more projects to clarify sves and check if past violations are corrected by subsequent submissions.	Eric	3/1/2022	3/7/2022	100%	3/4/2022
Annual Review Guide - work with Tammy	Sheila	3/1/2022	3/7/2022	100%	3/7/2022
create bond Ex A and Cover Letter templates through Emphasys	Lucas	3/1/2022	3/7/2022	100%	3/4/2022
Week 32 3/8/22 - 3/14/22					
Work with Sheila on the last section of the annual review processes guide	Tammy	3/8/2022	3/14/2022	100%	3/11/2022
and meet with Kelly to work on site inspection procedures	Kelly	3/8/2022	3/14/2022	100%	3/11/2022
Work with Tammy on Site inspection Procedures	Andray	3/8/2022	3/14/2022		
Review the last 19 projects' SS to clarify sves and check if past violations are corrected by subsequent submissions.	Eric	3/8/2022	3/14/2022	100%	3/11/2022
Annual Review Guide - work with Tammy	Sheila	3/8/2022	3/14/2022	100%	3/11/2022
email projects that are past due on owner docs, CP, or fees	Lucas	3/8/2022	3/14/2022	100%	3/10/2022
Week 33 3/15/22 - 3/21/22					
Finalize the Annual Review Guide and share with staff for review	Tammy	3/15/2022	3/21/2022	100%	3/21/2022
put inspection checklists and protocols on teams/ review procedures	Kelly	3/15/2022	3/21/2022	50%	4/4/2022
Review the Responses Flow Chart to ensure it's up-to-date	Eric	3/15/2022	3/21/2022	100%	3/18/2022
Finalize the Annual Review Guide and share with staff for review	Sheila	3/15/2022	3/21/2022	100%	3/21/2022
emailed owners/managers about LIHTC training	Lucas	3/15/2022	3/21/2022	100%	3/17/2022
Week 34 3/22/22 - 3/28/22 - NIFA CONFERENCE Mar. 28 thru 30					
No WIG Meeting on 3/28/22					
Week 35 3/22/22 - 4/4/22 - NIFA CONFERENCE Mar. 28 thru 30					
Review staff duties with Kelly	Tammy	3/22/2022	4/4/2022	100%	4/4/2022
review procedures from staff in the WIG folder & Staff duties	Kelly	3/22/2022	4/4/2022	100%	4/4/2022
Review Annual Review Processes/add Emphasys Exhibit A steps	Eric	3/22/2022	4/4/2022	50%	4/4/2022
Work on non-compliance vs future and share with staff for review	Sheila	3/22/2022	4/4/2022	100%	4/4/2022
create SS document w/ points for projects wanting to switch SS	Lucas	3/22/2022	4/4/2022	100%	4/4/2022
Week 36 4/5/22 - 4/11/22					
Update procedures for 8823's and changes to owner/management contacts	Tammy	4/5/2022	4/11/2022	100%	4/11/2022
Work on procedures for Bond Fees and 8823s	Kelly	4/5/2022	4/11/2022	100%	4/11/2022
Review Annual Review Processes/add Emphasys Exhibit A steps	Eric	4/5/2022	4/11/2022	75%	4/11/2022
Add AFHMP section to non-compliance vs future	Sheila	4/5/2022	4/11/2022		
add project scoreboard to the 2021 master review list	Lucas	4/5/2022	4/11/2022	100%	4/11/2022
Week 37 4/12/22 - 4/18/22					
Enter new project and update instructions	Tammy	4/12/2022	4/18/2022	100%	4/18/2022
n/a	Kelly	4/12/2022	4/18/2022		
Complete review of Annual Review Processes Manual	Eric	4/12/2022	4/18/2022	100%	4/15/2022
	Sheila	4/12/2022	4/18/2022		
creat document of useful tips/write-ups/reminders for staff	Lucas	4/12/2022	4/18/2022	50%	4/18/2022
Week 38 4/19/22 - 4/25/22					
Update new project	Tammy	4/19/2022	4/25/2022	25%	
review first half of the Annual Review Process	Kelly	4/19/2022	4/25/2022	25%	
Revisit the Income Calculator; more user friendly?	Eric	4/19/2022	4/25/2022	100%	4/22/2022
	Sheila	4/19/2022	4/25/2022		
document for tips/reminders	Lucas	4/19/2022	4/25/2022	100%	4/25/2022
Week 39 4/26/22 - 5/2/22					
Finish my task from last week and do a little more in the Annual Process manual	Tammy	4/26/2022	5/2/2022		
	Kelly	4/26/2022	5/2/2022		
	Eric	4/26/2022	5/2/2022		
	Sheila	4/26/2022	5/2/2022		
	Lucas	4/26/2022	5/2/2022		

Europe



**Travel with us through Europe
as we complete our wigs!**

Marketing WIG #1

Rebrand Tax Credits Forms & convert to fillable PDF's by December 31, 2021.

Stage 1 (Spain): 12/31/21

Rebrand all 45 forms & documents

Stage 2 (Ireland): 1/15/22

Convert to Fillable PDFs

Stage 3 (France): 1/26/22

Upload to NIFA's Website

Marketing WIG #2

Rebrand Homeownerships Documents by May 31, 2022.

Stage 1 (Norway): 3/01/22

Rebrand Lender Sales Training & Operations PowerPoints

Stage 2 (Germany): 4/01/22

Rebrand Specialists Courses

Stage 3 (Finland): 5/31/22

Rebrand Marketing Materials

Marketing WIG #3

Rebrand AG Applications & Documents by June 31, 2022.

Stage 1 (Russia): 5/01/22

Rebrand applications

Stage 2 (Ukraine): 5/10/22

Convert applications to fillable PDFs

Stage 3 (Turkey): 6/31/22

Rebrand all other AG documents on NIFA's website

HFA: Nebraska Investment Finance Authority
Entry Name: The Trouble with Tradition, Making a Cultural Change
Category\Subcategory: Management Innovation\Internal Operations

Exhibit 3: **Defining our Future – Mission Statement, Core Values and Vision**



CORE VALUES



commitment



integrity



collaboration



innovation



stewardship





MISSION

*Growing Nebraska communities through
affordable housing and agribusiness.*





VISION STATEMENTS

(3-5 year) NIFA leverages its resources, data, knowledge and technology, with affective statewide partnerships and collaboration, to promote vibrant Nebraska communities through affordable housing solutions and agribusiness.

(10 year) NIFA is an indispensable partner for Nebraska citizens and communities in planning, creating and sustaining affordable housing, advancing agribusiness, and furthering a vibrant Nebraska.



HFA: Nebraska Investment Finance Authority
Entry Name: The Trouble with Tradition, Making a Cultural Change
Category\Subcategory: Management Innovation\Internal Operations

Exhibit 4: **Human Resource Staff Trainings**

Sensitivity Training

In this course, employees will learn and discuss the types of harassment: Quid pro Quo, Hostile Work Environment, Discriminatory Harassment including Title VII, ADEA (Age Discrimination in Employment Act), ADA (Americans with Disabilities Act), and protected classes. Employees will learn the difference between illegal and unprotected conduct. We will discuss the cost of harassment and best practices. Your specific procedures will be included in this training, so employees are properly educated on their resources and the location of those resources.

Providing an Excellent Customer Experience

Excellent customer service is one of the most critical components of any business. In this training, we will cover:

- Internal vs. External Customer Service
- Handling Difficult Customer Scenarios
- Communication Styles

Participants will leave this session with tools and actionable items to enhance their ability to provide an excellent customer experience.

Time Management

In this session, we will focus on tips for effective time management, what is urgent vs. important, how to manage time for your health, and maximizing your time at work. When you focus on better time management skills, your mental health will improve at work and at home.

Critical Conversations

It is critical that every employee in your organization knows where they stand. Providing accolades is easy to do, however giving employees feedback on how they can improve their performance can be a challenge. Naturally as people we tend to avoid conflict. In this session, we will discuss the importance of performance reviews and providing honest feedback. Participants will walk away with strategies to implement when they are involved in tough conversations with their employees.

The Power of Influence

The power of influence gives you the ability to motivate and inspire. A vital component of leadership is the ability to influence; the best leaders are those who can use the power of influence to initiate positive change. When utilized effectively, influence allows you to be key drivers in impacting people, businesses, and processes, while getting the results you want through behavioral change. The traits people possess that allow for the power of influence are crucial when identifying the difference between a leader and a manager.

Adversity Quotient (Resilience)

Known as the most widely used way to measure human resilience, AQ is one of the most important cognitive traits a person can have in business. Having AQ will enhance productivity, problem solving, engagement, and leadership. In this training, we will discuss how to enhance your AQ, how to detect AQ in the recruiting process, and how to reward and recognize the individuals who have high AQ within your organization.

Intellectual Humility

It's okay to be wrong. In fact, being able to admit you are wrong takes confidence and self-awareness. In this training, we will discuss the importance of recognizing when you may be wrong and how to detect those blind spots. Admitting wrongdoing can be difficult, but through intellectual humility, the ability to do so will create cultural change throughout the organization.

Servant Leadership

In this session, we will focus on the seven pillars of servant leadership. This model provides context around the key components we must express as leaders to illustrate servant leadership to those around us. Managers will leave with a framework of servant leadership and actionable items to provide positive impact in their leadership practice.

DISC Profile Assessment

DiSC® is a personal assessment tool used to improve work productivity, teamwork, leadership, sales, and communication. DiSC measures your personality and behavioral style. It does not measure intelligence, aptitude, mental health or values. DiSC profiles describe human behavior in various situations, for example how you respond to challenges, how you influence others, your preferred pace and how you respond to rules and procedures.