



About the Client

The City of Savannah is the oldest city in Georgia and the fifth largest city in the state (~140,000 pop). Savannah is a thriving seaport community that is aggressively addressing its affordable and workforce housing needs. The City's Housing Department and its partners, including banks, businesses and non-profits, use ~\$1.6M annually in federal CDBG/HOME funds along with the Savannah Affordable Housing Fund to leverage millions of other dollars to improve, develop and sell housing for low and modest income residents. Savannah housing programs include:

- Down-Payment Home Purchase
- Employer Assisted Home Purchase
- Volunteer Home Repair
- Veteran Home Repair
- Disaster Home Repair
- Home Repair/Rehabilitation
- Home Construction/Development
- Rental Property Repair/Construction
- Rental Property Development



Anita Smith-Dixon,
Administrator, Housing Department

Challenges

The City of Savannah Housing Department was using paper based applications, multiple excel spreadsheets, and manual processes to administer its housing programs. The City was searching for a way to not only drive administrative efficiency, but also to improve customer service. Specific goals, included:

- Reducing staff time spent chasing incomplete applications and/or missing documentation
- Reducing staff time required to input, manage and tabulate data in excel spreadsheets
- Tracking and managing a diverse range of projects with both singular and multiple funding sources
- Reporting real time program results to key stakeholders
- Providing an easier way to securely store and retrieve sensitive data related to personally identifiable information
- Increasing staff capacity for customer outreach and service

Results

In partnering with Neighborly Software, Savannah's Housing Department is benefitting from a comprehensive, user friendly, software solution that has helped the Department:

- Improve customer service, responsiveness, and oversight
- Increase by 95% the speed and accuracy of data inputted and managed by staff
- Reduce by 50% staff time spent reviewing and qualifying applicants
- Reduce monthly reporting errors by 96%
- Reallocate ~10% of staffs' time to customer outreach and program activity

“Neighborly Software has enabled our staff to become much more efficient, organized, timely and accurate in assisting our customers and partners. Our staff loves the software and our customer service is on the rise!”

About the Client

Founded in 1821, the City of Columbia is the fourth most populous city in Missouri and is home to the University of Missouri Tigers.

As a Midwestern college town, Columbia has a reputation for progressive politics, persuasive journalism, and public art.

The City's Community Development Department allocates ~\$1.4M annually in federal CDBG/HOME funds to meet a variety of housing, infrastructure and economic development needs for low to moderate income households and neighborhoods. Columbia's programs include:

- Down-Payment Assistance
- Minor Home Repair
- Housing Rehabilitation
- Community Land Trust
- CDBG Public Services
- Property Acquisition & Demolition



Gary Anspach, Manager
Housing Programs

Challenges

Compliance and transparency have always been the cornerstone of the City of Columbia's Community Development Department. However, as their programs expanded and their loan portfolio grew, more of the staff's time was being dedicated to compliance and audit activities. The City needed a more efficient way to manage its programs and ensure compliance. Specific goals, included:

- Eliminating the multiple spreadsheets and legacy Access database used to administer and track programs and loans
- Providing greater transparency into funding decisions
- Reducing staff time required to prepare for internal and external audits
- Providing an auditable way to track and report on program accomplishments

Results

Neighborly Software enables the City to efficiently manage all of its intake, compliance, reporting, funding, and loan management activities in one comprehensive solution – a solution specifically designed for Housing, Economic and Community Development organizations. Specific results include:

- Managing a complex and growing loan portfolio, consisting of 750+ amortizing, deferred and forgivable loans
- Providing more transparency in the application scoring and funding decisions of proposed public service projects
- Enabling real time visibility into funding balances by year and program, including required set asides
- Reducing staff time by 20% in preparing for internal and external audits

“Neighborly Software provides us peace of mind by enforcing compliance and audit controls and providing me real time visibility into our program spending and results.”

CITY OF FORT WORTH, TX

Case Study

Meet Our Neighbor

Fort Worth is the fifth-largest city in the state of Texas and serves a population of over 950,000 people.

To date, the City of Fort Worth has leveraged Neighborly Software to administer \$134+ Million in pandemic and annual federal and state funds that provide affordable housing, a safe living environment, and create economic opportunity.

Programs Used

Affordable Housing	HUD Notice of Funding Opportunities
Lead-Safe Housing	Multi-Family Weatherization Assistance
ERAP Subrecipients	Non-Government Organization Grants
Emergency Solutions Grants	Priority Repair
HOME-ARP NOFA	Permanent Supportive Housing
Healthy Homes for Heroes	Public Service Agencies
HOPWA	Tenant-Based Rental Assistance

Challenges Faced

Fort Worth realized the need to modernize the delivery of its program funding and overcome the following challenges to better meet the critical needs of its community:

- ▶ Case file information existed in multiple locations and formats and became unmanageable.
- ▶ Tracking was manually updated, required external department involvement, and was inefficient.
- ▶ We had difficulties administering funding quickly and in a user-friendly way.
- ▶ Reporting wasn't real-time and compliance was very difficult to track.



Neighborly Software
www.neighborlysoftware.com

KEY RESULTS

Neighborly Software provides the City of Fort Worth an automated and efficient way to manage multiple programs with:



Optimized Reporting

Budgeting and spending is tracked and managed from a single view and is streamlined.



Fully Compliant

CDBG funding is automatically structured in the system's configuration. The audit log allows for use internally and externally.



Centralized For All Users

Staff and community members alike find the software intuitive and easy to use. They can check on project and case status, and easily request draws.



Fully Configured

Application structure, processes, and reporting are fully configurable, enabling us to have greater community impact.



Terrance Jones

Neighborhood Services Manager
City of Fort Worth, TX



With Neighborly Software, we now receive real-time data which is HUGE when managing multiple programs and projects. This has enabled us to become much more efficient in making sure everyone is being served. Reporting is another tremendous benefit we are leveraging. We now have full visibility of our costs and payments which is critical. The system is naturally structured for HUD and CDBG and allows us to easily process information and move cases forward in a compliant manner!



Habitat for Humanity

Greater Fresno Area, CA

Meet Our Neighbor

Working in California in Fresno and Madera counties, Habitat for Humanity Greater Fresno Area serves a combined population of 1.15 Million people and improves the housing conditions of 100 families per year.

To date, Habitat of Greater Fresno Area has leveraged Neighborly Software to administer \$1.6 Million in **Housing Rehabilitation (CDBG) funds**. This funding has provided assistance to over 150 families by preserving existing housing through minor beautification and major rehabilitation projects.



“With Neighborly Software, we now receive real-time data which is HUGE when managing multiple programs and projects. This has enabled us to become much more efficient in making sure everyone is being served. Reporting is another tremendous benefit we are leveraging. We now have full visibility of our costs and payments which is critical. The system is naturally structured for HUD and CDBG and allows us to easily process information and move cases forward in a compliant manner!”

Jerry Zuniga, Director
Housing Preservation & Aging Services

Challenges Faced

Prior to the pandemic, Habitat of Greater Fresno realized the need to modernize the delivery of its program funding and overcome the following challenges to better meet the critical needs of its community:

- Case file information existed in multiple locations and formats and became unmanageable.
- Tracking was outdated, required external department involvement and was formatted incorrectly.
- Family Services (Intake), Construction, Project Management, and Accounting were disconnected and required additional administrative oversight to compile information.
- CDBG compliance was very difficult to track.

Key Results

Neighborly Software provides Habitat of Greater Fresno Area a streamlined and efficient Housing Rehabilitation program administration through:

- **Optimized Reporting:** No longer relies on the accounting dept. for outdated financial information
- **Fully Compliant:** CDBG funding is automatically structured in the system's configuration.
- **Centralized Contractor Management:** No longer looking through emails for information.
- **Fully Configured:** Application structure, processes, and reporting are fully configurable, enabling us to have greater community impact.

MANATEE COUNTY, FL

Neighbor Spotlight

Meet Our Neighbor

Manatee County is located in central Florida with a population of 399,710. It's largest city is Bradenton.

Through its CDBG funding, the county has been able to provide meals to seniors, street outreach, and connect individuals experiencing homelessness to housing resources, eviction prevention, legal services, and homebuyer education.

Over the course of its lifetime with Neighborly Software, Manatee County has administered \$82,863,973 in federal, state, and emergency assistance funding to its community.

Programs Used

Public Service Agencies	Homeowner Rehabilitation & Replacement
Down Payment Assistance	Emergency Rental Assistance
Public Service Grants (CDBG)	Homeless Solution Grants (ESG, HOPWA)
Homebuyer Education	Eviction Prevention
Federal and State Funding	HUD Notice of Funding Opportunity

Challenges Faced

Manatee County realized the need to modernize its application processes and project management tools to overcome the following challenges and better meet the critical needs of its community:

- ▶ **Incomplete & Inaccurate Applications:** Missing documentation requiring multiple reviews with each submission.
- ▶ **Tracking:** Had to get the status of applications and projects from the project manager.
- ▶ **Project Workflows:** Staff couldn't easily pull reports on expenditure of funding sources.

KEY RESULTS

Neighborly Software provides Manatee County, FL an automated and efficient way to manage multiple programs with:



Streamlined Workflows

It has eased the burden of maintaining documentation, including reviewing documents and record retention..



Fully Compliant

CDBG funding is automatically structured in the system's configuration. The audit log allows for use internally and externally.



Centralized For All Users

Provides an easy application process for submission of all requirement documents from Lending Partners.



Elimination of Paper Files

Application structure, processes, and reporting are online and fully configurable.

“

The ability to make some questions/documentation “Required” preventing application submission with missing documents has saved staff tremendous time in verifying completeness of applications, payment requests, and reporting.

”



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Housing & Community Development Team
Manatee County, FL



About the Client

Located just north of Fort Lauderdale, in the heart of Florida's Gold Coast, the City of Pompano Beach is home to clear ocean waters, golden sandy beaches, accessible marinas and a colorful offshore coral reef. Over 110,000 people call Pompano Beach home with just over 23% of its population living below the poverty level. The City's Office of Housing and Urban Improvement (OHUI) is responsible for administering roughly \$2.3M annually in federal and state funds to assist in the development and redevelopment of a viable community which provides affordable housing, economic opportunity, and a safe living environment. OHUI's programs include:

- Housing Rehabilitation
- Emergency Housing Repair
- Down-Payment Assistance
- Wind Mitigation
- Public Service Grants (CDBG)



**Miriam Carrillo, Director
Housing and Urban Improvement**

Challenges

The City of Pompano Beach's Office of Housing and Urban Improvement (OHUI) was tasked with modernizing the way it delivered its services. The leadership team was searching for a solution to enhance program compliance while reducing its administrative expenses. Specific goals, included:

- Reducing the risk of noncompliance with applicable laws and regulations associated with failure to follow established procedures.
- Eliminating the inefficiency and compliance risk associated with paper applications and multiple Excel spreadsheets used to track and manage OHUI programs.
- Reducing administrative expenses related to paper, printing and document storage.

Results

In partnering with Neighborly Software, OHUI is leveraging the system's workflow to ensure that all compliance steps and approvals are completed. The software is simultaneously reducing OHUI's administrative costs by automating routine tasks and reporting requirements. Specific results include:

- Reducing the time to produce monthly CAPER and compliance reports from 3 days to 1 day.
- Avoiding the need to replace an open intake position, thereby reducing personnel costs by \$32,000 annually.
- Decreasing paper, printing and document storage costs by an average of \$780 per month (\$9,000+ per year).
- Reducing the average time to process subrecipient and contractor reimbursement requests by 2 days.

"Neighborly Software more than pays for itself; it has enhanced our program compliance, reduced our administrative costs and allowed us to allocate more money to our housing and community development programs"







PRINCE WILLIAM COUNTY, VA



Meet Our Neighbor

Located on the Potomac River in Virginia, Prince William County is the second-most populous county in the state and home to over 470,000 people. PWC's Office of Housing and Community Development is responsible for administering roughly \$19M in Pandemic and annual federal and state funds that provide affordable housing, create economic opportunity, and a safe living environment.

Programs Used:

-  Rehabilitation (CDBG)
-  First Time Homebuyer (HOME)
-  Emergency Housing Assistance (CARES Act)
-  CDBG Competitive Grant (CDBG)
-  Emergency Solutions Grant (ESG)
-  Affordable Rentals





- ✓ 6.1% of 470,000+ Residents in Need
- ✓ \$3.7M annually in Federal Funds



Challenges Faced

Prior to the pandemic, PWC OHCD realized the need to modernize the delivery of its program funding to meet the critical needs of those in its community. An outdated, inefficient system, cumbersome reporting methods and manual workflows were just a few of the challenges they faced. The leadership team realized it was time for a solution that would enable them to implement programs with speed, accuracy and empathy.

Problems Identified:

-  Inefficient processes & manual workflows
-  Untimely delivery of program funding
-  Incomplete reporting and data sharing due to outdated system
-  Inability to accept online applications for program assistance





- ✓ 45 minutes to upload one PDF.
- ✓ Dealing with spreadsheets and paper write-ups.



Key Results

By partnering with Neighborly Software, PWC automated routine tasks and reduced administrative inefficiencies. With a newly established set of tools, templates and technology, PWC is able to accelerate program execution, achieve precision with loan reviews and underwriting, generate good data for reporting, effectively manage costs and meet schedule objectives. This translates to on-time performance and cost efficiency and a lasting, positive impact on PWC's community.

Benefits:

-  Reduced production time of federal & local Compliance reports
-  An online application feature crucial in providing assistance to 833 households with CARES Act Funding
-  Precision with loan review, cost management and project execution
-  Ability to meet expedited program timelines

- ✓ Increased speed of deliverables by days
- ✓ Ability to hire staff remotely to help with applications



“Neighborly Software is incredible; their support team goes above and beyond and the solution has dramatically improved program efficiency, increased our productivity and enabled us to deliver critical program dollars to our community in a timely manner.”

Joan Duckett
Assistant Director
Housing & Community Development