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Tasha Harris, Vice President and Compass Project Lead, Office of COO

Housing Partnership Network
Housing Counseling Program Meeting
March 5, 2020

What is NeighborWorks Compass™?

- A 4th generation **CUSTOMER RELATIONSHIP MANAGEMENT** tool for the housing counseling and education industry (one line of business, multiple service types).
- Enhances the customer experience and allows access to self-serve products and services to achieve goals.



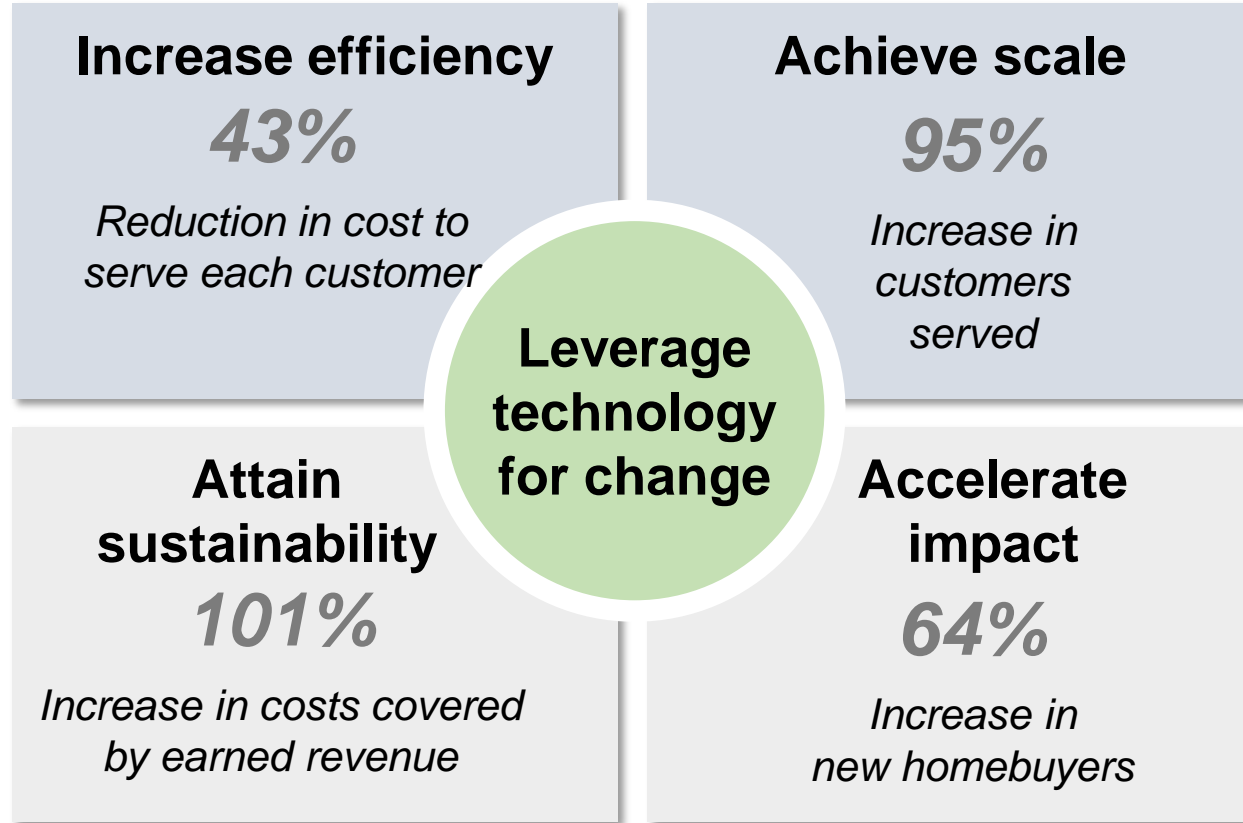
The Future Vision

- **Individuals and families** have a chance to build wealth, find stability and security, and participate in decisions that impact their future.
- **All communities**, and the nonprofits and leaders that serve them, are resilient and empowered to create positive change.
- **The systems and industries** that are fundamental to this work operate efficiently and effectively to remove barriers and obstacles to individual and community success.

Built During an Innovative Initiative

- Sustainable Business Initiative (SBI) builds social entrepreneurs who strive to achieve a double bottom line: **purpose** (mission) and **profitability**.
- SBI provides targeted resources to empower NeighborWorks organizations to:
 - Increase **EFFICIENCY**
 - Achieve **SCALE** in production
 - Attain **SUSTAINABILITY**
 - Create exponential **IMPACT**

Focused on Results



Initial Technology Design

- Why Salesforce?
- Designed and shaped by network participants' **feedback**; 70 NWOs (750 current users)
- Designed to aid organizations in becoming more **nimble and entrepreneurial** as they shift to a social enterprise business model
- Leverages relationships exponentially to create a **gold mine of accessible data** that increases outreach and fuels impact

The Big Infrastructure Build: It's Not *Just* the Product

- Product
- NeighborWorks Store
- Set-up Wizard
- Automated Data Migration
- Multi-modality Training Components
- Comprehensive Support System

NW Compass Features – *Under Development*

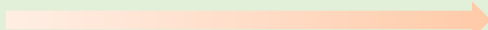
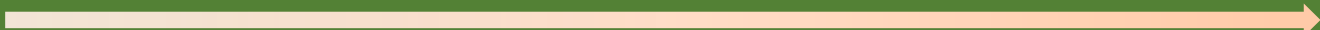
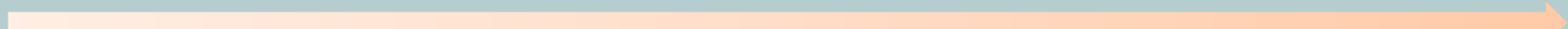
1. HUD 9902 bridge
2. ORS bridge
3. Customizable milestones for counseling and education services
4. Standard reporting for homebuyer education and counseling services
5. Dynamic budget tool
6. Interactive action plan tool visible in customer account
7. Tri-merge soft credit pull
8. Multi-person course registration
9. Multi-session course attendance tracking
10. Automated workshop roster and easy sign-in
11. Auto-generated course certificates
12. Online scheduling and payment for counseling appointments
13. Setup wizard
14. Automated triage and mortgage readiness

Amended Release Schedule

In developing a world-class CRM (Customer Relationship Management) system, it is vitally important that we take the time to ensure the product is right, the *first time*

Initial target was spring 2020. We have made a corporate decision to revise our implementation timeline to allow for infrastructure development, and a phased implementation beginning in early 2021 and continuing through December 2021 and beyond

Timeline for NeighborWorks Compass™ Releases

2Q 20 (Jan-Mar)	3Q 20 (Apr-Jun)	4Q 20 (Jul-Sep)	1Q 21 (Oct-Dec)	2Q 21 (Jan-Mar)	3Q 21 (Apr-Jun)	4Q 21 (Jul-Sep)	1Q 22 (Oct-Dec)	2Q 22 (Jan-Mar)	3Q 22 (Apr-Jun)	4Q 22 (Jul-Sep)
	<i>NWOs + LaunchPad</i>			<i>LaunchPad</i>		<i>CounselorMax (NWOs + Industry)</i>		<i>HUD Intermediaries + Other Industry Partners</i>		
NW Compass Infrastructure Development	Pilot 			Onboard 						
	4	10	20	120	240	590	940	1000	1100	1270
	NW Compass Feature Development 									

CounselorMax[®] Status

- CounselorMax users who choose to move to NeighborWorks Compass will begin transitioning in mid-2021
- When a decision has been made regarding the discontinuation of CounselorMax, users will be given significant advanced notice so you have plenty of time to transition to NeighborWorks Compass or explore alternatives
- Recognizing the importance of a seamless move to the future, NeighborWorks America is committed to keeping CounselorMax HUD-compliant, fully functional and fully supported

NeighborWorks Compass™ Demo

Customer Free Account



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[Contact Us](#)

[Resources](#)

[Sign In](#)

[English](#) 

Create Your Free Account

Tell us more about what services you're interested in

For us to help you, we need to know which of the services that we offer that you would like to know more about. Please read the descriptions of the programs and services we offer below, and then select the ones you're interested in and then we can get started crafting a custom plan just for you!

▼ Financial Empowerment

We offer one-on-one financial counseling to provide you with the necessary steps to improve your credit, income, savings and debit.

▼ New Home Purchase

Thinking about purchasing a new home? We can help you learn the ins and outs of purchasing a home and being a sustainable homeowner.

▼ Existing Homeowner Services

Already own your own home? Click here to see our existing home owner services!

I agree to the [Consent to Receive Documents Electronically](#)

[Continue](#)

Already have an account? [Sign In](#)

Customer Interested Services

▼ New Home Purchase

Thinking about purchasing a new home? We can help you learn the ins and outs of purchasing a home and being a sustainable homeowner.

- Are you interested in meeting one-on-one with a housing counseling specialist to discuss your specific housing goals and develop a personalized plan for homeownership?
- Learn all the ins and outs of homeownership in our 8 hour course!
- Ready to take the leap into homeownership? We have many flexible financing products - find out more here.

What is the primary area in which you are looking to purchase a home? *

--Select One--



What other areas are you interested in?

Please click on one or more of the locations listed in "Available Areas" to move it to the "Selected Areas" column; to remove a selection from the "Selected Areas" column, simply click on that selection to move it back to "Available Areas".

Available Areas

Mongtomery County
Giles County
Floyd County
Roanoke County

Selected Areas

--

▼ Existing Homeowner Services

Customer Account Basics



[Training Center](#)

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Create Your Free Account

First Name *

Frances

Last Name *

Jayne

Email Address *

frances.jayne1234@yopmail.com

Confirm Email Address *

frances.jayne1234@yopmail.com

Phone Number

How did you hear about us? *

Flyer / Folleto



[Create Account](#)

Already have an account? [Sign In](#)

Leads Management: Auto-Email To Customer



Dear Frances Jayne:

Thank you for your interest in our Pre-Purchase Counseling service! We look forward to working with you. Currently, we are missing some critical pieces of information that we need in order to begin assisting you; the information we need is listed below:

Monthly Income
Monthly Creditor Debt
Total Savings

Please log into your account at [\[Org link\]](#) and visit your My Profile page to complete the missing information. If you have questions, please use the Contact Us link found in the upper right hand corner of your account page.

Thank you,

NHSIE

Leads Management



All Search Contacts and more...



NW SHP Lightning Home Messages Organizations **Contacts** Services Course Sessions Bookings & Fees Properties Offers More

Contacts **All Leads Open - Not Contacted** New Import Add to Campaign

50+ items · Sorted by Last Modified Date · Filtered by all contacts - Stage, Contact Record Type · Updated a few seconds ago

Search this list...

	Name	Phone	Email	Conta...	Title	Stage	Last Modified Date	Contact Record Type
1	<input type="checkbox"/> Erin Atm		eatm1234@yopmail.com	amcco		Lead Open - Not Contacted	11/14/2019 11:00 PM	Lead
2	<input type="checkbox"/> Erin Error		eerror1234@yopmail.com	amcco		Lead Open - Not Contacted	11/14/2019 12:00 AM	Lead
3	<input type="checkbox"/> David Error		derror1234@yopmail.com	amcco		Lead Open - Not Contacted	11/14/2019 12:00 AM	Lead
4	<input type="checkbox"/> Carl Error		cerror1234@yopmail.com	amcco		Lead Open - Not Contacted	11/14/2019 12:00 AM	Lead
5	<input type="checkbox"/> Carl Name		cname1234@yopmail.com	amcco		Lead Open - Not Contacted	11/6/2019 11:00 PM	Lead
6	<input type="checkbox"/> Hello Sally	(850) 456-...	hellosally321@yopmail.c...	amcco		Lead Open - Not Contacted	11/5/2019 11:00 PM	Lead
7	<input type="checkbox"/> Test LIFT		lifftest1@yopmail.com	amcco		Lead Open - Not Contacted	11/1/2019 12:00 AM	Lead
8	<input type="checkbox"/> Amy Fork		afork1234@yopmail.com	amcco		Lead Open - Not Contacted	10/25/2019 12:00 AM	Lead
9	<input type="checkbox"/> lead record type			cvill		Lead Open - Not Contacted	10/24/2019 12:00 AM	Lead

Customer Dashboard > Update Profile

[Dashboard](#)[Services](#)[My Profile](#)[My Documents](#)[Training Center](#)[Contact Us](#)[Resources](#)[Sign Out](#)[English](#)

Welcome, Frances

RECENT ACTIVITY

Created your account!

[View Activity](#)

NEXT STEPS

Update your Profile to unlock your Dashboard.

[Update Profile](#)

Welcome to the NHSIE family! You've made the decision to get started – now let's see where you are in the home purchase process! Completing your profile will help estimate your credit score, how much home you can sustainably afford, and which classes and appointments you should schedule to help you realize your goal of homeownership. Once you've completed your profile, our team can then guide you through your next steps in the home purchase process and your personal Dashboard will provide you with a snapshot of your progress. So what are you waiting for?

[Complete your profile](#) to unlock the full power of your Dashboard!

Customer Profile > My Account



[Dashboard](#)

[Services](#)

[My Profile](#)

[My Documents](#)

[Training Center](#)

[Contact Us](#)

[Resources](#)

[Sign Out](#)

[English](#) ▼



My Account

[My Services Summary](#)

My Account

First Name *

Frances

Last Name *

Jayne

Suffix

--Select One--

Email Address *

frances.jayne1234@yopmail.com

Phone Number *

Preferred Phone Type *

--Select One--

Customer Profile > My Services Summary ²

[Dashboard](#)[Services](#)[My Profile](#)[My Documents](#)[Training Center](#)[Contact Us](#)[Resources](#)[Sign Out](#)[English](#) ▼

▼ Pre-Purchase Counseling Active

*Birthdate

11/19/1978

[11/15/2019]

SSN

*Gender

Female / Femenino



*Race

Black or African American / Negro o afro-americano



* Ethnicity

Not Hispanic or Latino / No hispano ni latino



* Current Gross Monthly Income

3,200

* Current Household Gross Monthly Income

4,600

* Current Savings

6,500

* Current Total Debt

5,000

* Credit Score - Equifax

490

* Credit Score - Experian

495

* Credit Score - TransUnion

510

* Current Total Retirement/Other Assets

25,498

* Household Size

2

* Current Housing Arrangements

Rental / Alquiler



Customer Dashboard > Profile Complete

[Dashboard](#)[Services](#)[My Profile](#)[My Documents](#)[Training Center](#)[Contact Us](#)[Resources](#)[Sign Out](#)[English](#)

Welcome, Frances

RECENT ACTIVITY

Roadmap to Success 11/14/2019.pdf

[View Activity](#)

NEXT STEPS

Please upload pay stubs for the previous 3 months

[View Steps](#)

CREDIT SCORE

495

350

850

Learn how to improve your score.

As of 11/15/2019 [Update](#)

MONTHLY INCOME

\$ 3,200

As of 11/15/2019 [Update](#)

MONTHLY DEBT

\$ 150

5% of Monthly Income

As of 11/15/2019 [Update](#)

SAVINGS

\$ 6,500

Goal of \$ 12,364

As of 11/15/2019 [Update](#)

The financial information shown here on your Dashboard was provided by you during the setup of your profile. A "Verified" flag will appear by each financial metric once you have uploaded supporting documentation and our staff has confirmed your information.

Your sustainable homeownership affordability range

\$ 137,695 - \$ 152,994

[Learn more about how this is calculated.](#)

Customer Dashboard > Next Steps



Dashboard

Services

My Profile

My Documents

Training Center

Contact Us

Resources

Sign Out

English

Next Steps

To take the next step in scheduling an appointment or registering for a class, please go to the [Training Center](#). To upload documents, go to [My Documents](#).



Initial Home Buyer Development Appointment

SCHEDULE NOW



Homebuyer Education Course

SCHEDULE NOW



Please upload pay stubs for the previous 3 months

DATE DUE
11/20/2019

Customer Training Center



Dashboard

Services

My Profile

My Documents


2

Training Center

Contact Us

Resources

Sign Out

English 



Thanks to NHSIE, I now am a home owner after 25 years of renting!

James

My Appointments

Classes and appointments we recommend, as well as those you have scheduled, appear under My Appointments. **NHSIE has a no refund policy regarding all appointments, classes and workshops.** Appointments may be rescheduled once booked via the 'Reschedule' function for a scheduled appointment. If you register for a class or appointment, then find you are unable to attend and cannot find an available date to reschedule, please [Contact Us](#).

Customer Training Center > My Appointments

My Appointments

Classes and appointments we recommend, as well as those you have scheduled, appear under My Appointments. **NHSIE has a no refund policy regarding all appointments, classes and workshops.** Appointments may be rescheduled once booked via the 'Reschedule' function for a scheduled appointment. If you register for a class or appointment, then find you are unable to attend and cannot find an available date to reschedule, please [Contact Us](#).



Homebuyer Education Course

Interested in home ownership? Don't know where to get started or who can help? Our intensive yet FUN 8-hour course will prepare you with all you need to know about the ins and outs of being a successful and sustainable home buyer!

[Details](#)

Initial Home Buyer Development Appointment

Questions about the home buying process? Need some one-on-one guidance from a home purchase expert? Schedule your one on one appointment with us now, and we'll get you that much closer to holding the keys of your new home.

[Register](#)

Customer Training Center >

Available Courses & Workshops

Available Classes & Workshops

Interested in taking additional classes? Below is a full listing of all our classes currently scheduled - feel free to browse through our selection of informative offerings and sign up for the ones you feel can help you on your journey towards homeownership!



Home Buyer Education & Counseling Bundle - \$75.00

An 8-hour HBE class, your first individual counseling appointment, and a one on one follow up appointment. A \$100 value, offered bundled together for \$75! Take the first steps towards home ownership here!

[Purchase](#)

Money and Credit SMARTS Bundle Package - \$125.00

One Money SMARTS! course and two one on one appointments - purchase this bundle and save \$50!

[Purchase](#)

**DEC
1**


12/1/2019 Money and Credit SMARTS!

Main Office - 12/1/2019 8:00 AM

Come learn from the pros about the best strategies to increase your savings, pay down your debt, and increase your credit score - all by making a few changes to things you do every day!

[Register](#)[View Online Classes](#)

NW Compass > Tasks


All
Search Salesforce

NW SHP Lightning
Home
Messages
Organizations
Contacts
* 01- Schedule Appoin

Task
01- Schedule Appointment

 Mark Complete

Name [Frances Jayne](#)
Related To [F. Jayne - Home Buyer Development - 2019-11-14](#)

Details		Related	
Assigned To	SHP Tech Support	Status	Not Started
Subject	01- Schedule Appointment	Days Open From Today	1
Due Date	11/15/2019	Task Template Id	aOL1M00000XimrYUAR
Type	Misc	Result	
Priority	High	Name	Frances Jayne
Close Date		Related To	F. Jayne - Home Buyer Development - 2019-11-14
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Other Information</p> <p>Public <input type="checkbox"/></p> </div>			
<div style="border: 1px solid #ccc; padding: 5px;"> <p>System Information</p> <p>Created By Frances Jayne, 11/14/2019 10:47 PM</p> <p>Last Modified By Frances Jayne, 11/14/2019 10:47 PM</p> <p>Comments</p> </div>			

Upcoming & Overdue

- v
☑
☰
01- Schedule Appointment !
Today v

[SHP Tech Support](#) has an upcoming task about ...

Related To

[F. Jayne - Home Buyer Development - 20...](#)

Description
- v
☑
☰
Please Verify Financial Info
Yesterday

[Alicia McCoy](#) has an upcoming task

Description

A lead has converted to a customer - please verify their financial info. Thank you!

NW Compass > Dispatched Services Milestones



All Search Salesforce

NW SHP Lightning Home Messages Organizations **Contacts** Services Course Sessions Bookings & Fees Properties Offers

Contact
Frances Jayne

Milestones Dashboard

- Not Started - Completed - In Progress - Overdue

Group Education



Home Buyer Development (Counseling)



Other areas interested

NW Compass > Customer Financials

Customer Financial Info

Current Gross Monthly Income <small>i</small>	\$3,200	
Current Savings	\$6,200	
Current Total Retirement/Other Assets	\$25,498	
Current Monthly Creditor Debt <small>i</small>	150	
Current Total Debt <small>i</small>	\$5,000	
Current Amount of Judgments/Collections <small>i</small>	\$0	
Credit Score - Equifax <small>i</small>	495	
Credit Score - Experian <small>i</small>	500	
Credit Score - TransUnion <small>i</small>	508	

Change in Credit since Intake	5
Change in Monthly Debt since Intake	\$0.00

Monthly Income Verified	
Savings Verified	11/15/2019
Assets Verified	
Monthly Debt Verified	
Total Debt Verified	
Derogatory Collections Verified	
Credit Score Verified	11/15/2019

Change in Income since Intake	\$0.00
Change in Savings since Intake	(\$300.00)



NW Compass > Financial Impacts Dashboard

All ▾

Search Salesforce



NW SHP Lightning

Home

Messages ▾

Organizations ▾

Contacts ▾

Services ▾

Course Sessions ▾

Bookings & Fees ▾

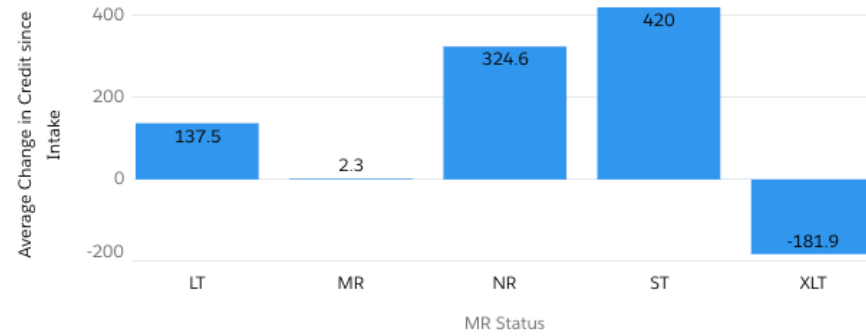
Properties ▾

Offers ▾

Can

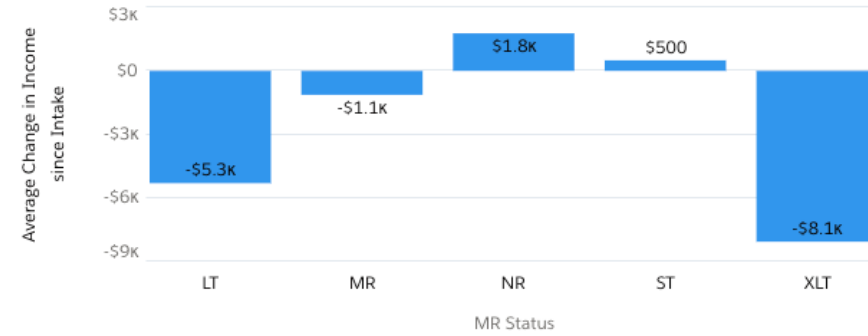
Financial Metrics Change over Time

Average Change in Credit by MR Status



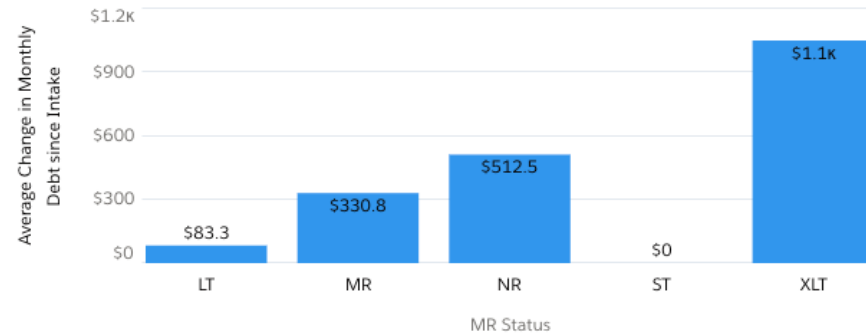
[View Report \(Average Change in Credit by MR Status\)](#)

Average Change in Income by MR Status



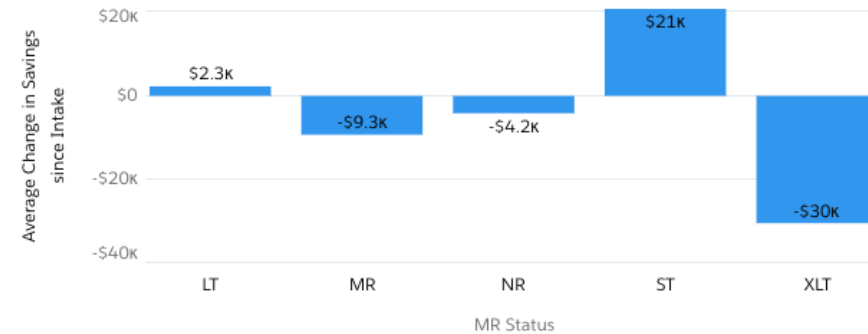
[View Report \(Average Change in Income by MR Status\)](#)

Average Change in Debt by MR Status



[View Report \(Average Change in Debt by MR Status\)](#)

Average Change in Savings by MR Status



[View Report \(Average Change in Savings by MR Status\)](#)

NW Compass > Mortgage Readiness Status



All Search Salesforce

- NW SHP Lightning
- Home
- Messages
- Organizations
- Contacts
- Services
- Course Sessions
- Bookings & Fees
- Properties
- Offers

Contact
Frances Jayne

▼ Mortgage Readiness Status

Total Income for MR Status ⓘ	\$3,200.00	MR Status	LT
Desired Home Price ⓘ		Maximum Mortgage Affordability	\$152,994.30
Desired Mortgage Term ⓘ		Max Mortgage Affordability - Low End	\$137,694.87
Median Credit Score ⓘ	495	Estimated Monthly Mortgage ⓘ	\$614.92
Total Savings for MR Status ⓘ	\$6,500.00		
Total Debt for MR Status	\$150		
Total Derogs for MR Status ⓘ	0	Include Co-Applicant?	<input checked="" type="checkbox"/>
Obstacles Collections Text	Congratulations - no 'Collections and Judgements' pitstop for you! You don't have any outstanding collections or judgments to pay off or settle.		

▼ MR Fields

MR Status Total ⓘ	53	Missing Info ⓘ	• Goals/Status - Where are you in the Home Buying Process?
Debt Status	0	Income Status ⓘ	0
Credit Status ⓘ	28	Savings Status	25
Estimated Income/Housing Ratio	22.29%	Estimate Savings Ratio	52.57%
Estimated Monthly Payment ⓘ	\$713.31	Savings Required ⓘ	12,364.13
		Estimated Closing costs ⓘ	10,937.50

NW Compass > Homebuyer Roadmap

Frances Jayne's Roadmap to Success

Congratulations! You've taken an important first step on your journey towards homeownership. Although there may be a few pitstops that you need to make along the way, NHSIE is here to help. This summary provides you with a snapshot of where you are now and where you need to go in order to reach your ultimate destination - homeownership!

Please bring this Roadmap to Success with you to your first appointment or class! We look forward to working with you.

Monthly Income:

Your Current Monthly Income:	\$3,200.00
Your Estimated Purchase Price:	\$125,000.00
Your Estimated Interest Rate:	4.2500%
Your Estimated Monthly Housing Payment:	\$713.31

Result:

Congratulations - no 'Income' pitstop for you! Your current monthly income is sufficient to support your estimated monthly housing payment!

Collections and Judgments:

Your Total Amount of Collections and Judgements:	\$0.00
Total Amount of Your Savings Available to Pay Off Collections/Judgements:	\$6,200.00

Result:

Congratulations - no 'Collections and Judgements' pitstop for you! You don't have any outstanding collections or judgments to pay off or settle.

Credit Score:

Your Estimated Credit Score:	500
------------------------------	-----

Result:

Pitstop ahead! Your current estimated credit score needs to be raised by the following amount in order to meet the minimum score generally required for homeownership:

160

NW Compass > Homebuyer Roadmap

Debt to Income Ratio:

Your Current Debt to Income Ratio: 42.60%

Result:

Pitstop ahead! Your current debt to income ratio is too high. You need either to reduce your monthly creditor debt by the following amount:

\$211.00

or increase your monthly income by the following amount:

\$587

Savings:

Your Current Savings (less amount needed to pay derogatory items) \$6,200

Savings Needed: 12,364.13

Result:

Pitstop ahead! Your savings need to be raised by the following amount to be mortgage ready:

\$6,164.13

Estimated Maximum Mortgage Affordability:

\$85,717.79

Many factors go into determining how much you can and want to spend on your new home. Based on the current monthly income and creditor debt that you provided to us, we have estimated your maximum mortgage affordability to be the amount shown above. Your actual affordability may be more or less depending on your individual circumstances, and your maximum affordability can change at any time if your income or debt increases or decreases. NHSIE will work with you to determine the purchase price that fits comfortably within your budget.

Customer > My Documents

[Dashboard](#)[Services](#)[My Profile](#)[My Documents](#)[Training Center](#)[Contact Us](#)[Resources](#)[Sign Out](#)[English](#) **2**[Upload](#)

Buying a home requires a lot of paperwork. Thankfully you can easily and securely share documents with your NHSIE Homeownership Advisor, as well as see what documents they've shared with you, with the click of a button! Typical documentation needed for a home purchase transaction includes income statements, bank statements, W-2s, etc. You will receive prompts on your Dashboard when documentation is needed, as well as emails from your Homeownership Advisor with additional information regarding required documentation as necessary.

All Documents

Number of Documents: 4

File Name	Description	Verified	
Roadmap to Success 11/15/2019.pdf	Roadmap - Verified	<input checked="" type="checkbox"/>	
Bank Statements.docx	Personal Bank Statement / Estado de cuenta bancaria personal	<input type="checkbox"/>	Delete
Pay Stubs.docx	Pay Stubs / Prueba de ingresos	<input type="checkbox"/>	Delete
Consent.pdf	Roadmap - Verified	<input checked="" type="checkbox"/>	

Reporting Sustainability: Earned Revenue

The percentage of the that are covered by earned revenue only.
organization's costs



Sustainability % - Earned Revenue Orgv2

Report Generation Status: Complete

Report Options:

Summarize information by:

Month of Operating Cost

Show

All organization monthly costs

Time Frame

Date Field

Month of Operating Cos

Run Report

Hide Details

Customize

Save

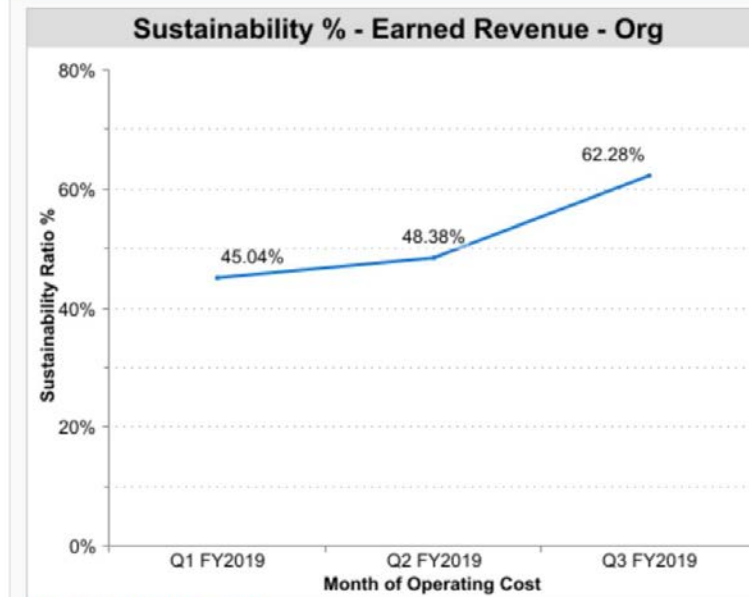
Save As

Delete

Printable View

Export Details

Subscribe



Edit Large | Medium | Small

Reporting Campaigns: #SheMatters Race

#SheMatters Race

Report Generation Status: Complete

Report Options:

Summarize information by:

Race

Show

Select a campaign:

Select campaign:

#SheMatters Expo

Run Report

Hide Details

Customize

Save

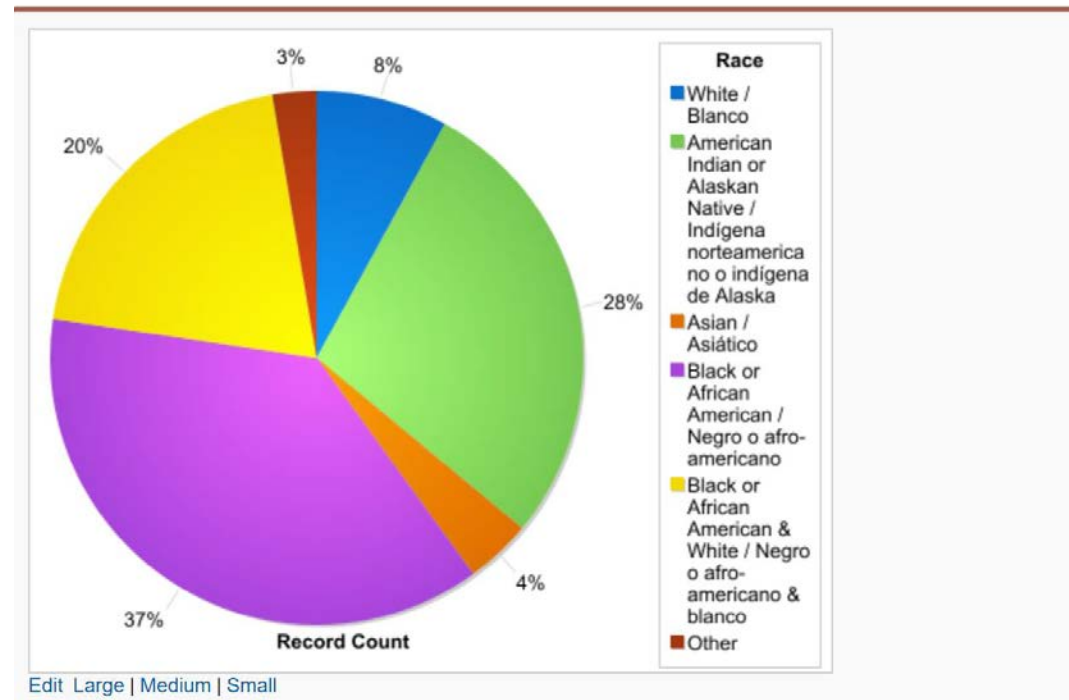
Save As

Delete

Printable View

Export Details

Add to Campaigns



From April to September: What to Expect

- Continued infrastructure and feature development
- Pilots testing and providing feedback
- Creation of a pricing structure
- Additional groups added to the pilots

Our Redoubled Focus: The Future Vision

- **Individuals and families** have a chance to build wealth, find stability and security, and participate in decisions that impact their future.
- **All communities**, and the nonprofits and leaders that serve them, are resilient and empowered to create positive change.
- **The systems and industries** that are fundamental to this work operate efficiently and effectively to remove barriers and obstacles to individual and community success.

Online Resources Available

- E mail questions to NWCompass@nw.org
- NeighborWorks.org/NWCompass for updates
- Members' Site, Tools/Resources, Software Tools