

TO: National Housing Resource Center

FROM: Sheila Rice, Interim COO
Kevin Prophet, Director Homeownership Applications

DATE: February 5, 2019

RE: Answers to Questions Posed on January 10, 2019 NHRC Call

Thank you for giving NeighborWorks America an opportunity to share our plans to develop a new CMS to replace CounselorMax on the January 10th NHRC call. The new CMS will replace our current CounselorMax product and will be based on the Salesforce platform. As we develop the new CMS, we are committed to full CounselorMax customer support, investing in updates and HUD compliance, and adding new customers.

Below are responses to the questions posed. Please feel free to reach out to me (srice@nw.org) or Kevin Prophet (kprophet@nw.org) if we missed any questions.

CounselorMax

Pricing - CounselorMax has an annual cost of \$595 for 5 users and an additional \$150 per each new user added. CounselorMax does not have a monthly fee.

Contact Information – For business related questions regarding invoicing and training you may contact us at 202-760-4156.

Wind Down – NeighborWorks will continue to support CounselorMax until an alternative CMS is in place. CounselorMax is alive and well and taking new customers. We commit to giving CounselorMax customers at least 12 months' notice before sunsetting CounselorMax.

Internet Browser – CounselorMax will go live on Google Chrome and Mozilla Firefox in the second week of February 2019.

Demonstration – A pre-recorded tour on our main website www.counselormax.com. For further questions, reach us at CounselorMax@nw.org.

Reporting Updates – CounselorMax has been updated with the FY19 changes to Financial Capability and HUD reporting.

System Updates – CounselorMax is frequently updated to remain in compliance. A new application for CounselorMax called ClientMax is currently available and provides a new customer portal that will allow customers to fill out their own outreach and intake forms directly into your CounselorMax database freeing up the counselor from data entry. For more information regarding our enhancements, please contact us at CounselorMax@nw.org.

Older Files – CounselorMax users can always work on older files in CounselorMax via the case management section in the Admin menu. Legacy is used when inputting an old case that you counseled before you had your instance of CounselorMax. There is no change to that workflow process.

Intermediary Subscription – A subgrantee can be a part of an intermediary’s CounselorMax subscription if: (A) the intermediary has given the subgrantee access to its license/database by securing and assigning user seats for the subgrantee; or (B) the intermediary has secured a separate license/database for the subgrantee and/or agreed to be billed for the subgrantee’s new or existing license/database. For more information, please contact us at CounselorMax@nw.org.

NeighborWorks New CMS

Customer Base – Just as CounselorMax served the industry, the new CMS module will be built on a Salesforce platform and will also serve the industry and be made available via the Salesforce App Exchange.

Training – NeighborWorks plans to offer training for the new CMS before migration and ongoing once the tool is available.

Migration – NeighborWorks plans to develop a seamless migration function through an onboarding process for CounselorMax customers who transition to the new CMS product. The speed, automation and cost of migration will depend on the volume and complexity of data migrated.

Pricing – NeighborWorks is negotiating bulk pricing with Salesforce. The new CMS tool will be available at an affordable price to nonprofits large and small. It is our intent to ensure that pricing includes the use of the tool and the Salesforce licenses needed to leverage the customer facing portal. One tool, one price.

Timing – Each organization needs to make their own decision according to their business needs. The best time for an organization to switch to a new CMS is specific to each organization.

Foundational System – NeighborWorks’ new CMS will be based on the Sustainable Business Initiative (SBI) Salesforce technology, which has been utilized by NeighborWorks Organizations (NWOs) with 4 years of progressive updates. SBI Tech was initially developed to increase operational efficiency and enhance the end-customer experience. As such, a Salesforce subscription will be required to use the new CMS. However, you will not have to buy a separate instance of Salesforce in addition to the new CMS. You will be able to purchase all in one directly from NeighborWorks® America.

Features – NeighborWorks America’s new CMS will include and expand on all of the functionality and features that are contained in CounselorMax now plus some additional new functionality which includes but is not limited to a robust customer-facing portal that allows end-customers to create accounts with the nonprofit and engage virtually, two-way document upload, online payment, online class and appointment scheduling, task assignment functionality, auto-

email follow-up, and a host of other features that have been proven to increase efficiency and sustainability. The new CMS will be a highly customizable tool that will accommodate any service line operated by the nonprofit. We are leading in the delivery of state-of-the-art tools that reduce or eliminate the need for multiple systems, reduce redundant data entry and reporting burden, and streamline service delivery. We continue to apply the “one organization, one system” mantra as we invest in robust functionality that meets the needs of our user community and the Housing Counseling industry at large.

Integration with other Systems – NeighborWorks is committed to engaging with solution partners in creating an interoperable platform that adds value to the Housing Counseling industry.

LaunchPad and NeighborWorks’ new CMS – As NeighborWorks develops the next generation of CounselorMax, NeighborWorks continues to be collaborative and supportive of efforts that enhance the performance and outcomes of the Housing Counseling industry. NeighborWorks and the Housing Partnership Network (HPN) are exploring whether a partnership or other collaboration with the LaunchPad Collaborative involving the LaunchPad CMS would allow NeighborWorks to meet the needs of its network members, existing CounselorMax customers and the housing counseling industry. Given our shared objective to provide a Salesforce-based CMS for the counseling industry, NeighborWorks and HPN have agreed to a time-limited, intensive review of the LaunchPad CMS as a potential next-generation solution for CounselorMax customers. Once this review is complete, we will communicate any decisions reached and next steps, if any.