



# New Mexico Finance Authority

**Bond Banking and Loan Management System Project**

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## Previous System - MITAS

- Lack of alignment with current NMFA business practices
- Lack of comprehensive reporting and monitoring
- Current version no longer supported by vendor
- Outdated technology



# Project Process

## *Independent Verification & Validation (IV&V)*

- Contracted with RESPEC, Inc.
- Contract requires IV&V services for ALL phases of project

## *FIT-GAP Analysis*

- Review of previous system
- Review of NMFA business processes and procedures
- GAP report used to determine Project Requirements Document

## *RFP*

- FIT-GAP and Requirements Document used to create RFP
- RFP process completed 2<sup>nd</sup> Quarter of 2015
- 5 vendors responded to RFP
- Based on scoring by Project Team 2 vendors were invited to present in person



## Procurement – Vendor Selected

- Technology Partnership Group (TechPG) based in Indianapolis, IN was the vendor selected – *4th quarter 2015*
- The EnABLE system is web-based, and hosted by the vendor (i.e. “cloud based”)
- Key features include:
  - Modules covering the full lifecycle of bond, loan, and grant management
  - Robust reporting
  - Flexible configuration for individual programs (PPRF, Water, Private Lending)
  - On-line, secure, client portal (applications, loan balances, statements)
  - Workflow engine with staff notifications and approval tracking



## Implementation

- Project plan divided into 4 phases, based on NMFA programs
  - *Water Programs (Water Trust Board, Drinking Water, Colonias)*
  - *Public Project Revolving Fund (PPRF)*
  - *Local Government Planning Fund (LGPF)*
  - *Economic Development (Private Lending, New Markets Tax Credits)*
- NMFA Legacy data for all active loans/grants to be loaded into EnABLE
- Monthly status updates, including IV&V report to NMFA Board





## Current Status

- **Water Programs** – Currently “live” in EnABLE, Clients actively submitting applications on-line
- **Public Project Revolving Fund** - Currently “live” in EnABLE, finalizing legacy data loading and reconciliation
- **Local Government Planning Fund (LGPF)** – Currently “live” in EnABLE
- **Economic Development** – Finalizing configuration



## Outstanding Items

- Go Live for Economic Development Phase
  - Anticipated 12/1/2018
- Finalize legacy data loading and reconciliation
  - Anticipated 12/31/18
- Decommissioning of current system (MITAS)
  - Anticipated 1/31/19



# Questions?

The screenshot shows the EnABLE web application interface. At the top left is the EnABLE logo, and at the top right is the New Mexico Finance Authority logo. A search bar is located below the logos. On the left side, there is a vertical navigation menu with the following items: Clients, Projects, Awards, Bonds, Grants/Prem, Loans, Financials, Funding Sources, Contacts, Security, Administration, Documents, Reports, Infrastructure, and Tools. The main content area is divided into several sections:

- My Tasks - 0 Tasks**: A table with columns for View, Task, Description, Due Date, and User/Group. A [View All](#) link is on the right.
- My Stuff**: A table with columns for Type, Name, Amount, Date1, Date2, Status/Type, and Role. A [View All](#) link is on the right.
- Announcements**: A table with columns for Announcement, Display From, and Display To. It shows "No Current Announcements" with two empty rows.
- Recent Records**: A list of records including "PPRF-4778", "Series 2018 Ed Tech Note", "Mesa Vista Consolidated School District No. 6", "DW Draw Reject Identification", and "DW-DR Accounting Review".
- Shortcuts**: A box containing a "Manage Shortcuts" link.
- Upcoming Events**: A section with no visible content.

At the bottom of the page, there is a footer with links for [Security Policy](#), [EnABLE Home](#), [Privacy Policy](#), [Link Policy](#), and [Accessibility Policy](#).