HOW PALMETTO CRA TRANSFORMED OPERATIONS AND ACHIEVED 200% EFFICIENCY GAINS

CHALLENGES FACED

The City of Palmetto's Community Redevelopment Agency manages multiple community development programs including commercial facades, residential rehabilitation, and major tax increment financing projects. When Executive Director Rowena Young joined in September 2024, she encountered a manual, paper-based system that created significant operational challenges:

- **Paper everywhere** with documents scattered across desks, files getting lost or shredded, and no centralized system
- **Extreme processing delays** with a single application taking five months without completion
- **Lack of transparency** making it difficult for team members to track progress or collaborate on applications

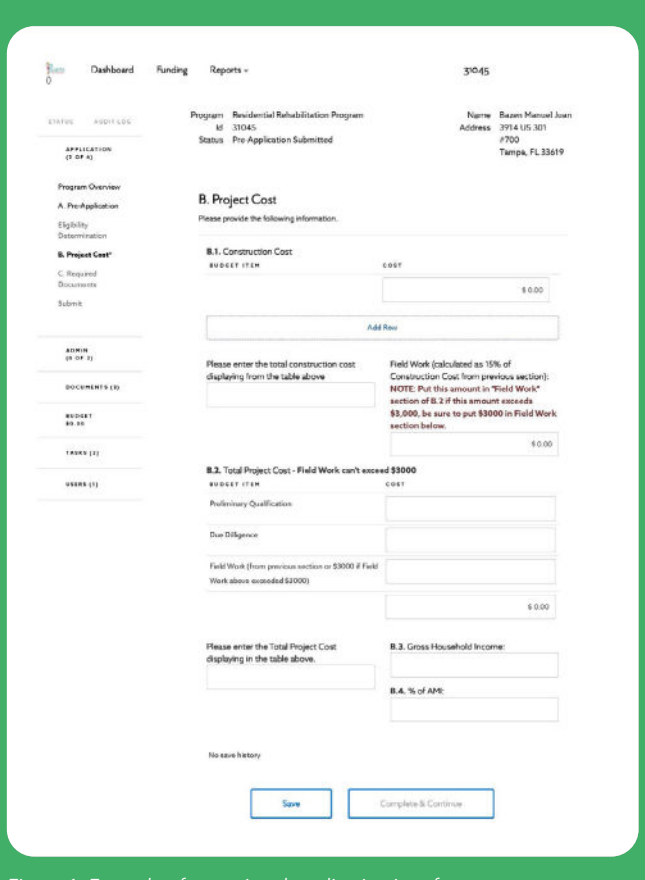

Figure 1. Example of new, virtual application interface

OUR SOLUTION

Palmetto CRA partnered with Neighborly Software to implement a centralized, digital platform serving as the single source of truth for all program data. The agency launched four Tax Increment Financing (TIF) programs on the platform:

- STOREFRONT GRANT
- RESIDENTIAL REHAB
- TAX INCENTIVE
- JUNK ABATEMENT

The platform enables the entire team to access application materials in one centralized location, review and approve applications digitally, render documents to PDF, and maintain complete audit trails—all without printing a single page.

IMPLEMENTATION

Palmetto CRA began implementation in May 2025, working closely with their dedicated Customer Success Manager to configure workflows for their four initial programs. The entire team received training on the platform, with the goal of cross-functional expertise so any team member can support applications when needed. The agency plans to add three more programs and additional staff users in 2026.

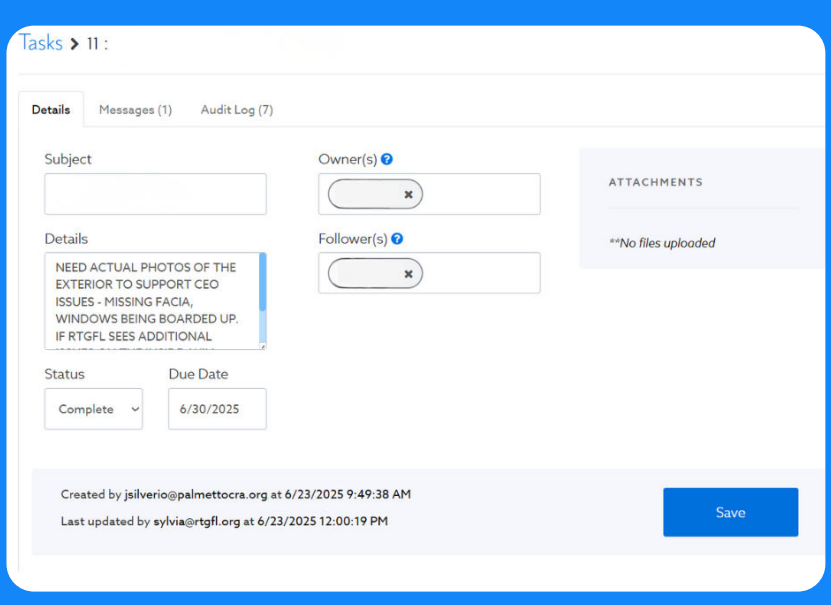

Figure 2. Example of new Task interface

RESULTS

Since launching Neighborly Software, Palmetto CRA has transformed its operations with measurable improvements:

- **200% efficiency improvement** in application processing time, reducing what took five months to just one month
- **30+ applications processed** across four different programs in the first fiscal year
- **$200+ million in TIF projects** moving through the pipeline with complete digital documentation
- **12 storefront grants** processed in the current fiscal year (compared to just 3 the previous year), with applications coming in so rapidly the agency needs to request additional funding
- **Fully paperless operations** with all documents rendered to PDF and transported directly to board meetings without printing
- **Enhanced communication** between CRA staff and applicants, using the task feature to notify applicants of pending actions instead of phone calls or delayed email exchanges
- **Improved workflow transparency** for both applicants and staff, with detailed status updates applicants can easily access and automated notifications when tasks are completed—eliminating the need for manual check-ins

The team now works collaboratively with real-time visibility into application status. Staff members call across the office to coordinate on projects, knowing exactly who is working on what and where applications stand in the approval process. The agency is preparing to expand further with Power BI dashboard integration and additional programs in 2026.

IMPACT

"My team doesn't have all this stuff piled up on their desk that they have to go review. We go in, we review, we check the boxes, we do all the things that we need to do inside of the Neighborly platform, and we print a complete copy of an application with all the supporting documents. You can't beat that."

Rowena Young,
Executive Director, Palmetto Community Redevelopment Agency

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Schedule a demo to learn how Neighborly Software can help your community implement efficient, compliant solutions.

SCHEDULE A DEMO

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