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| It's time for a HomeKeeper Checkup! This worksheet is designed for new and existing HomeKeeper staff who are planning an implementation, or exploring the possibilities for HomeKeeper for their program. Complete this template with your co-workers, keep as a reference, and check back to monitor your progress. | |
| Define your why | |
| *Example:* | *Here’s a straightforward equation: No Data = No Funding.*  *Increasingly, foundations, government, and other big donors require accurate and precise data on impact for grants and reporting. If you care about the mission of the organization, then you should care about whether it gets funded... Q.E.D., you should care about Salesforce and HomeKeeper.* |
| Why does your organization care about HomeKeeper? |  |
| How Does Your Organization use HomeKeeper? | |
| *Example:* | ***City First Homes*** *uses* ***Homekeeper*** *to:*   * *Store, manage, and display data on its homeowners and properties* * *Create impact reports and dashboards, which are used for board meetings and fundraising* * *Maintain a contact list of partners, funders, and applicants for properties* * *Track grant applications* |
| How does your organization use/ want to use HomeKeeper HomeKeeper? |  |

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| Functions Your Organization Is Using or Interested in Using | | | | | |
|  | | | Interested in Using | | Using |
| Property Development & Tracking | Track prospective acquisitions of land or buildings | |  | |  |
| Revolving Loan Funds | |  | |  |
| Track Development Costs | |  | |  |
| Manage properties and property characteristics | |  | |  |
| Application Management | Track a list of inquiries & outreach efficiency | |  | |  |
| Track application completeness progress | |  | |  |
| Centralize Income Qualification | |  | |  |
| Automate waitlist or lottery processes | |  | |  |
| Purchase Tracking | Track liens on the property and financing | |  | |  |
| Track loans your program makes to homeowners | |  | |  |
| Track the purchase process as homeowners close (Eg. Purchase and Sale, Inspections, etc) | |  | |  |
| Ongoing Relationship with Homeowners | Track your intervention when a homeowner gets underwater | |  | |  |
| Document requirements, like occupancy certification | |  | |  |
| Resale of a Home | Calculate resale price | |  | |  |
| Record exit survey information | |  | |  |
| Reporting | Create reports and charts relevant to community stakeholders | |  | |  |
| Report to your board regularly | |  | |  |
| Impact Measurement | Evaluate your program's performance internally | |  | |  |
| Benchmark your program against other programs in the National Data Hub on metrics like preserving affordability, building wealth | |  | |  |
| Other? |  | |  | |  |
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| How’s Your Data Look? | | | | | |
|  | | # in real life | | # in HomeKeeper: | |
| How many properties (owner occupied, under development) does your organization manage? | |  | |  | |
| How many applicants do you have in your pipeline? | |  | |  | |
| How many households have purchased through your program? | |  | |  | |
| How many times have properties “resold”? | |  | |  | |