



Homeownership Program Data Management Self-Assessment

Are you ready to make the move to HomeKeeper? This assessment is designed to help homeownership programs that preserve affordability over the long term identify strengths and weaknesses in their program's data management practices. Read each question and check the appropriate box.

| | N/I= Needs Improvement | YES | NO | N/I |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| 1. Does your program systematically track demographic data such as age, race, ethnicity and special needs on applicants? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Is your program data on applicants, homebuyers and transactions easily accessible to multiple program staff members? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Can you quickly produce a report showing the top three reasons why homeowners sell? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Can you quickly produce a report of your properties grouped by status (for sale, owner-occupied, in development)? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Does your organization have one centralized "address book" to store contact information of individuals and organizations? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Do you currently synchronize your program contacts (lenders, partner organizations, title companies) with your organization's fundraising efforts? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Are you satisfied with the way you monitor occupancy and insurance compliance? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. If your program also makes loans or grants to homebuyers, do you have an effective way of tracking your homebuyer subsidies and fund balances? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Do you have an easy way to back-up your program data and files on-line? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Do you consistently track appraisal information, such as the appraised unrestricted market value, so you can track changes over time? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Are you able to respond promptly to requests for reporting data without going through your paper files? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Are you satisfied with the way you currently manage program information? | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| | TOTAL | | | |

