



NATIONAL
COMMUNITY LAND TRUST
NETWORK

Fall 2014 HomeKeeper Adoption Grant Program

Background

HomeKeeper is a powerful Salesforce program designed for organizations that manage affordable homeownership programs. HomeKeeper enables your organization to efficiently maintain, manage, and use all of your information on potential homebuyers, homeowners and properties, generating high-quality performance reports and decision-making that is data-driven. The National Community Land Trust Network is an official HomeKeeper Implementation Partner of Cornerstone Partnership. Our goal is to see every community land trust and permanently affordable homeownership program adopt and use HomeKeeper, which will enable the sector to be more efficient, have a standardized workflow management system, and measure our national performance.

In support of this goal, the Network is pleased to release the second round of 2014 HomeKeeper Adoption Grants. While current HomeKeeper users unanimously report that it is well worth its cost, some organizations may be hesitant or unable to make the upfront investment to adopt HomeKeeper. The Network's grant program will help a select group of organizations to overcome these financial constraints by offsetting some of the costs of HomeKeeper adoption.

Description of HomeKeeper Adoption Grant program

In total, the Network expects to award **seven (7) \$4,000 HomeKeeper Adoption Grants** to current Network members that:

- 1) Complete the attached HomeKeeper Adoption Grant Application,
- 2) Meet all of the eligibility requirements listed on the application,
- 3) Participate in a scoping call with HomeKeeper staff, and
- 4) Sign a HomeKeeper Adoption Grant Agreement.

The Network anticipates awarding three (3) grants to "Larger Programs," defined as eligible organizations that have 50 or more homeownership units, and four (4) grants to "Smaller Programs," defined as eligible organizations that have 20 or more homeownership units.

HomeKeeper Adoption grant applications will be **considered in the order that they are received.** We expect to award grants to the first three Larger Programs and first four Smaller Programs to complete all of the four application steps listed above. If grants reserved for Larger Programs are not awarded by October 31st, 2014, the remaining awards will likely be granted to additional Smaller Programs. However, the Network reserves the right to modify its award distribution plan.

One half of the total grant (\$2,000) will be disbursed by the Network within 30 days after the Grantee submits proof of payment of both the HomeKeeper One-time Enrollment Fee and Annual Membership Fee (<http://myhomekeeper.org/sign-up/pricing>) as well as a copy of the HomeKeeper staff's email confirming completion HomeKeeper orientation and the entry of the first file.

The remaining \$2,000 will be disbursed by the Network within 30 days after the Grantee has fully completed data entry of household, purchase transaction, and property information for their current and historical portfolio, for all HomeKeeper National Roll Up fields.

HomeKeeper Adoption Grant Application

Complete the following Application and e-mail to Beth Sorce at beth@cltnetwork.org. HomeKeeper Adoption Grant Applications, submitted by qualified organizations, will be considered in the order that they are received. Applications may not be submitted before October 9th, 2014 at 9:00 am Pacific.

1. **Today's Date:**
2. **Your Organization's Legal Name:**
3. **Your Name:**
4. **Your E-mail:**

You must answer true to the following statements to be eligible for a HomeKeeper Adoption Grant. If your organization does not meet the eligibility requirements, do not proceed with application.

Eligibility Requirements	Response
<p>My organization is a 2014-2015 National CLT Network Member.</p> <p><i>If you are unsure of your membership status, go to: http://cltnetwork.org/directory/. If you are not presently a Network member, join here <u>before</u> submitting this application: http://cltnetwork.org/join/.</i></p>	<p><input type="checkbox"/> True</p> <p><input type="checkbox"/> False</p>
<p>My organization has not yet completed the HomeKeeper Member Application, is not currently a HomeKeeper user and has not been a HomeKeeper user in the past.</p>	<p><input type="checkbox"/> True</p> <p><input type="checkbox"/> False</p>
<p>My organization has at least 20 homeownership units in a community land trust, a long-term deed-restricted housing program, or another permanently affordable homeownership program.</p> <p><i>"Homeownership units" includes those that are <u>currently</u> for sale or occupied by homeowners. You may <u>not</u> count units under construction or rehab, subsidies/funding that have not been assigned to a property, or homeownership units that are not preserving affordability for at least 30 years.</i></p>	<p><input type="checkbox"/> True</p> <p><input type="checkbox"/> False</p> <p style="color: red;">Enter# home ownership units meeting the specified definition here:</p> <div style="border: 1px solid black; width: 100px; height: 40px; margin-left: auto; margin-right: auto;"></div>
<p>My organization is able and willing to pay the HomeKeeper One-time Enrollment Fee and the HomeKeeper Annual Membership Fee within 60 days of the HomeKeeper Adoption Grant Award notification. For current costs, see: http://myhomekeeper.org/sign-up/pricing</p>	<p><input type="checkbox"/> True</p> <p><input type="checkbox"/> False</p>
<p>After 2014, my organization is committed to paying the HomeKeeper Annual Membership Fee each year.</p>	<p><input type="checkbox"/> True</p> <p><input type="checkbox"/> False</p>
<p>The staff responsible for HomeKeeper implementation and I are available for a scoping meeting with HomeKeeper staff at the following dates and times.</p> <p><i>Suggested meeting times must be within 10 business days of the application submission date. Please note your time zone when listing availability.</i></p>	<p>1.</p> <p>2.</p> <p>3.</p> <p>4.</p>