



Turn Program Data into Actionable Insights

National CLT Conference • October 20, 2015



Turn Program Data into Actionable Insights

Agenda

- Introductions and Overview
- Intro to Dashboards
- Small Group Brainstorming
- Open Sharing
- Regroup and Closing



From Counting... to Compelling

- 23 Buyers Served
- 18 Properties



Top 5 Occupations

Occupation	Record Count
Teacher/Aide	8
Office Administrator	7
Other	6
Health Care - Support Staff	5
Manufacturing	5



“We ensure our teachers, our health care workers can live in the community.”

It's not just the noise, rent increases, slow landlord response to our plumbing problems and the talk of turning the units into condos...



▼ Living Situation at Time of Application

Date in Applicant Home 1/2/2002

Quality of Living Situation Adequate

Applicant Living Situation Rent

Applicant Housing Type Apartment

Applicant Monthly Housing Costs \$1,600.00

Utilities Included in Rent? No

Percent of Rent to Income 45%

Applicant Utilities \$145.00

Lease Expiration Date

Date Sold Last Home

How Many Addresses In 5 Years Prior 9

Receiving Section 8 Subsidy?

Section 8 Subsidy Amount

Actual Housing Ratio 29.88%

Actual Debt Ratio 31.92%

Inspection Report Received

Inspection Contingency Waived

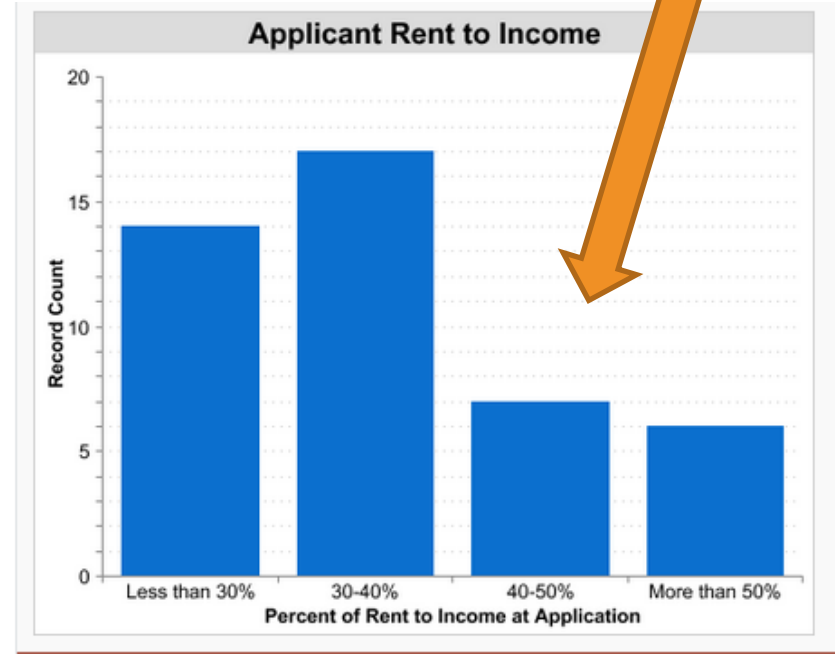


Story + Data

This is true
across
applicants!



It's not just the noise, rent increases, slow landlord response to our plumbing problems and the talk of turning the units into condos...



What's a Dashboard?



- ✓ Consolidate metrics
- ✓ Single snapshot
- ✓ For a specific role
- ✓ Real-time data
- ✓ Multiple data sources



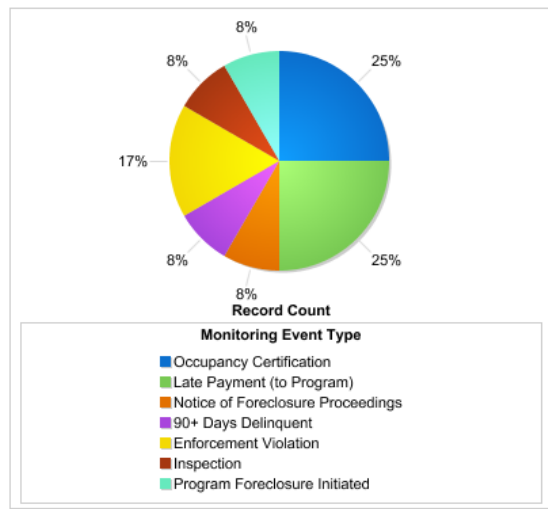
Stewardship Coordinator



Monitoring Events Dashboard

Find a dashboard... Edit Clone Refresh As of March 27, 2015 at 11:15 AM

Active Monitoring Events by Type

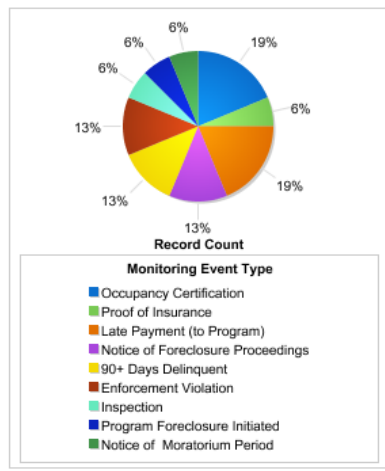


Monitoring Event Type	Record Count
Occupancy Certification	3
Proof of Insurance	1
Late Payment (to Program)	3
Notice of Foreclosure Proceedings	1
90+ Days Delinquent	1
Enforcement Violation	2
Inspection	1
Program Foreclosure Initiated	1

Active Events by Service File

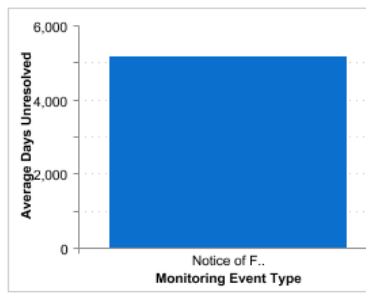
Service File: Service File Name	Days Unresolved

All Monitoring Events by Type



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Notice of Moratorium Period	1

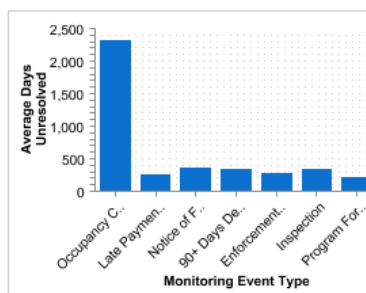
Average Days to Resolution



Monitoring Event Type	Average Days Unresolved
Notice of Foreclosure Proceedings	5,142

Above charts include only Monitoring Events that have been resolved.

Average Days Unresolved



Active Monitoring Events only.

Who cares?

- ✓ Funders
- ✓ Board members
- ✓ Donors
- ✓ Local government
- ✓ City Council
- ✓ Legislature



What decisions are they making?



- ✓ \$\$\$ Fund us.
- ✓ Give us lipservice.
- ✓ Recommend friends and family apply
- ✓ Encourage local gov't support
- ✓ Designing local policy

What do they need to know to act?

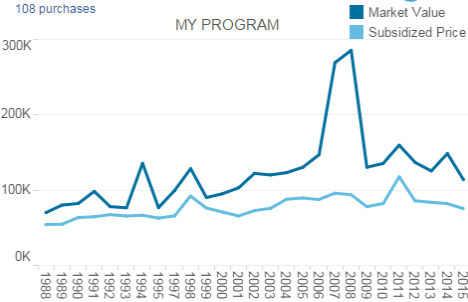


- ✓ 20% of the Districts teachers are residents in our homes.
- ✓ Our homeowners stay in their homes for an average of 14 years.
- ✓ 80% of our homeowners move on to buy a market rate home.
- ✓ We supported 5 homeowners in ways that helped them avoid foreclosure.

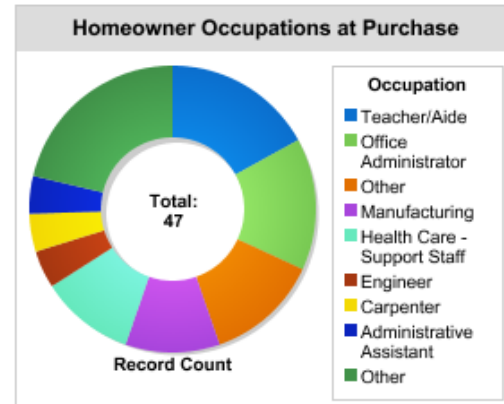
What do they see or hear to act?



How have values and prices changed? ?



<u>Top 5 Occupations</u>	
<u>Occupation</u>	<u>Record Count</u>
Teacher/Aide	8
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Other	6
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Manufacturing	5



What are the datapoints behind those statements?



- ✓ 20% of the Districts teachers are residents in our homes.
- ✓ Our homeowners stay in their homes for an average of 14 years.
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- ✓ We supported 5 homeowners in ways that helped them avoid foreclosure.

How do you collect?



- ✓ Application Data
- ✓ Online Forms
- ✓ Exit Survey
- ✓ In person conversation
- ✓ Post-purchase stewardship
- ✓ ?????

Your Storytelling Dashboard Roadmap

1. Who Cares?
2. What decisions are they making?
3. What do they need to see or hear to act?
4. **What are the data points behind those statements**
5. **How do you collect the data?**



Working Session!

On Your Flip Chart, Record:

1. Your Audience: Funders, Board members, Executive Director, Donors, Local government/City Council, Legislature,
2. List 1-2 decisions are they making or what they need to do
3. Write out 1-2 storyline statements
4. Draw 2-4 data charts to back it up
5. Be prepared to share your statements



Your Storytelling Dashboard Roadmap

1. Who Cares?
2. What decisions are they making?
3. What do they need to see or hear to act?
- 4. What are the data points behind those statements**
- 5. How do you collect the data?**



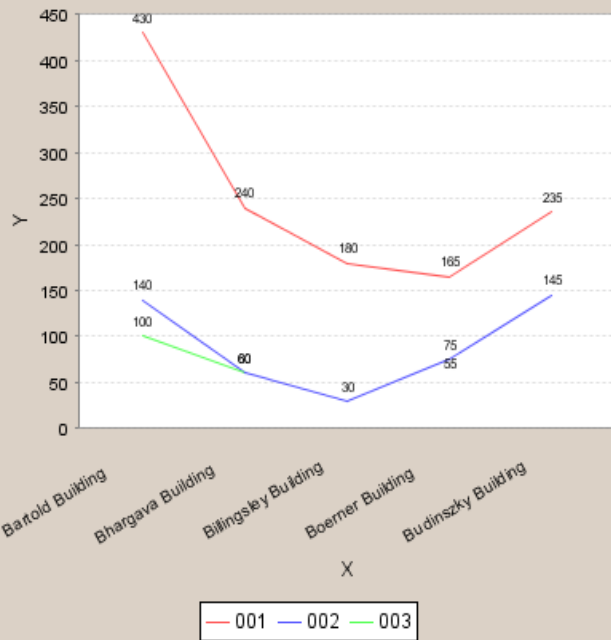
How do you create these?

- ✓ Create by hand with a designer, Canva for annual report
- ✓ Excel Chart
- ✓ HomeKeeper Hub Public Dashboard
- ✓ HomeKeeper Dashboard
- ✓ Social Impact Report benchmarked reports



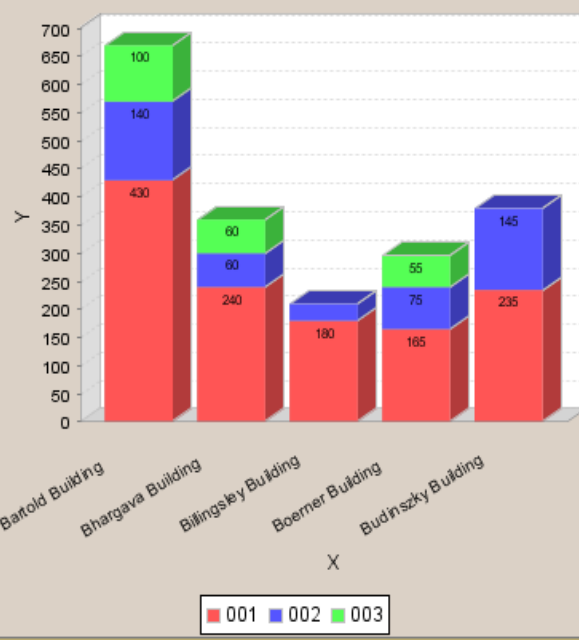
Line Chart

Line Chart



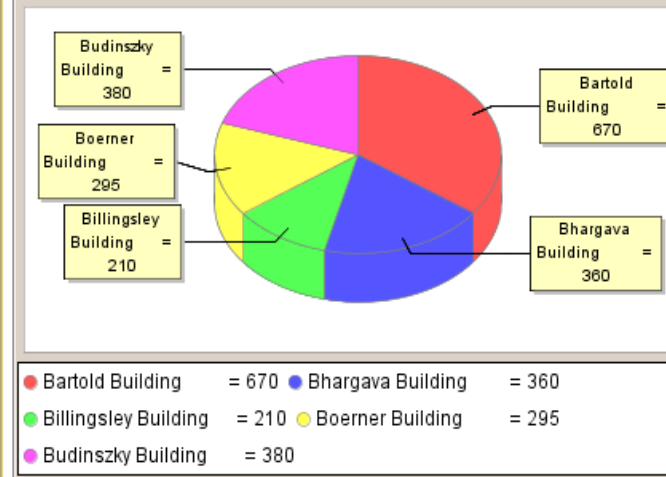
Stacked Bar Chart

Stacked Bar Chart



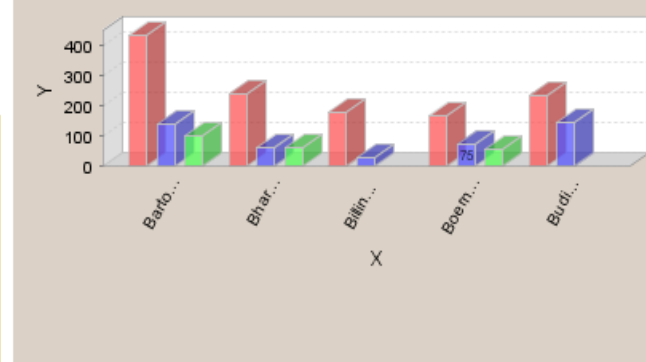
Pie Chart

Pie Chart



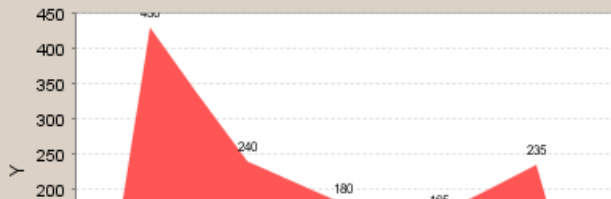
Bar Chart

Bar Chart



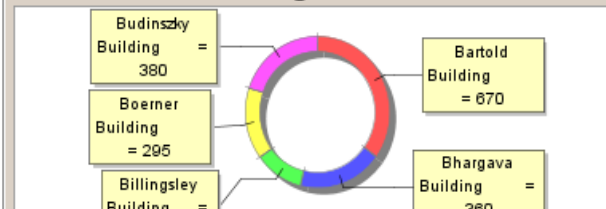
Area Chart

Area Chart



Ring Chart

Ring Chart



Canva

81%

OF SHARED EQUITY
HOMEBUYERS WHO OWN THEIR
HOME AFTER 5 YEARS

50%

OF LOW INCOME 1ST TIME
HOMEBUYERS WHO OWN THEIR
HOME AFTER 5 YEARS



CREATING A
SUCCESS
FRIENDLY
HOMEOWNERSHIP
EXPERIENCE

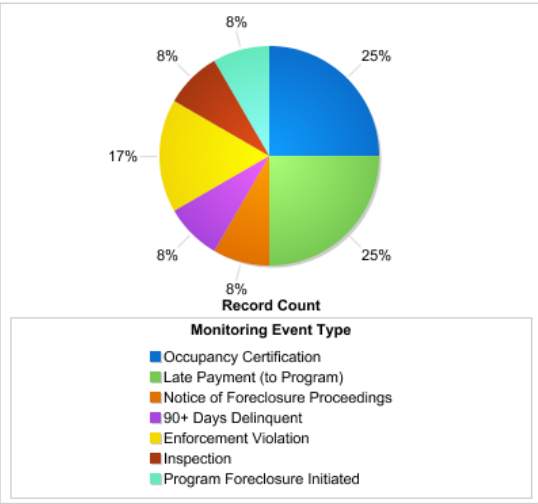
HomeKeeper Dashboard



Monitoring Events Dashboard

Find a dashboard... Edit Clone Refresh As of March 27, 2015 at 11:15 AM

Active Monitoring Events by Type

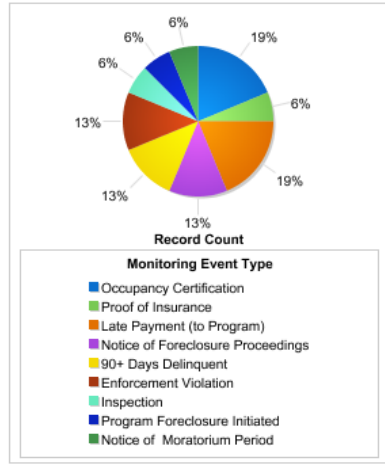


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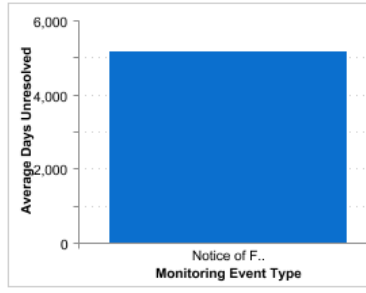
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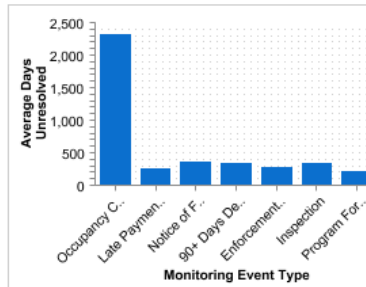
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Average Days Unresolved



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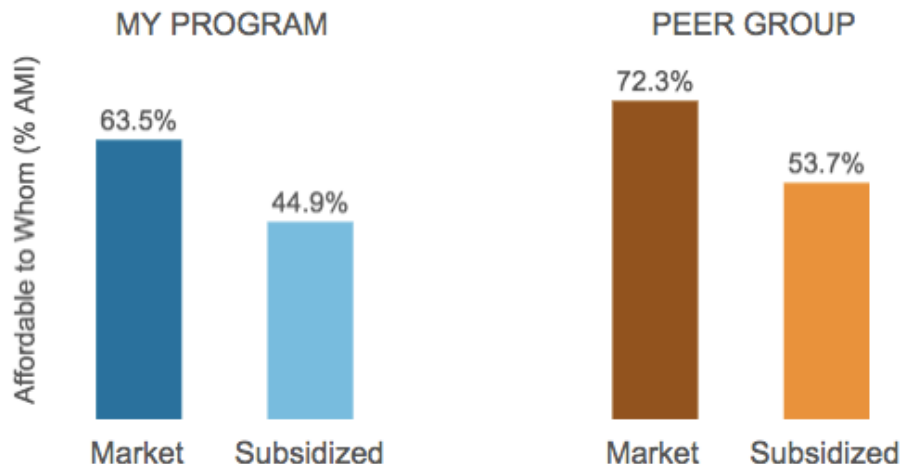
HomeKeeper Social Impact Report

Please return
enter your
Code.

Affordability

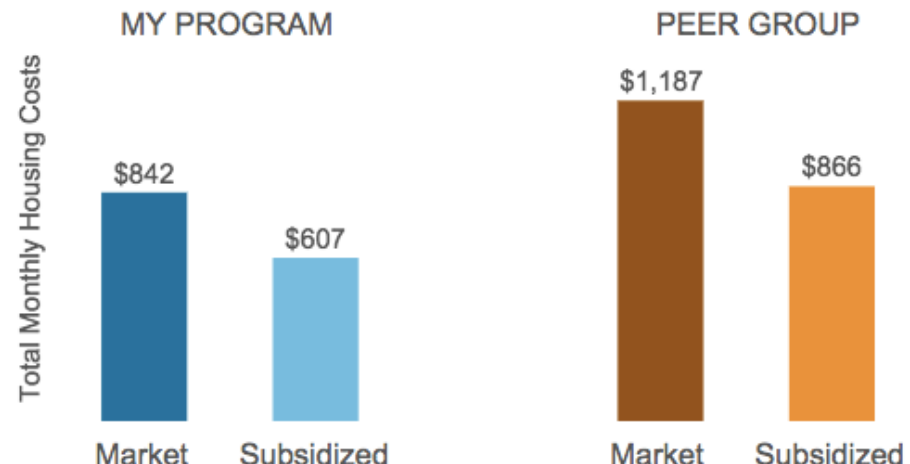
How much affordability is created?

103 purchases 5,228 purchases



By how much are costs reduced?

103 purchases 5,225 purchases



The program's typical home was affordable to households earning 63.5% of

The program reduced total monthly ownership costs for the typical household

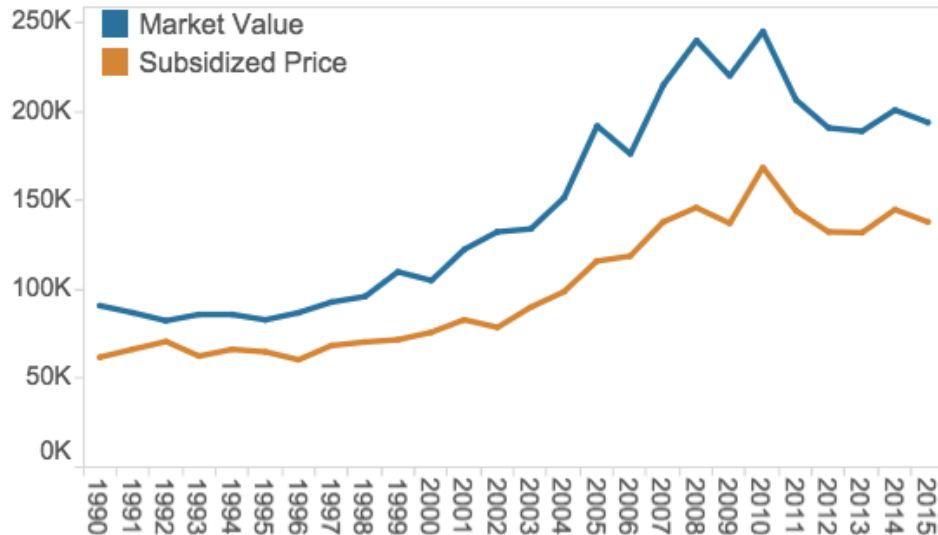
HomeKeeper Data Hub Public Dashboard



Community Investment

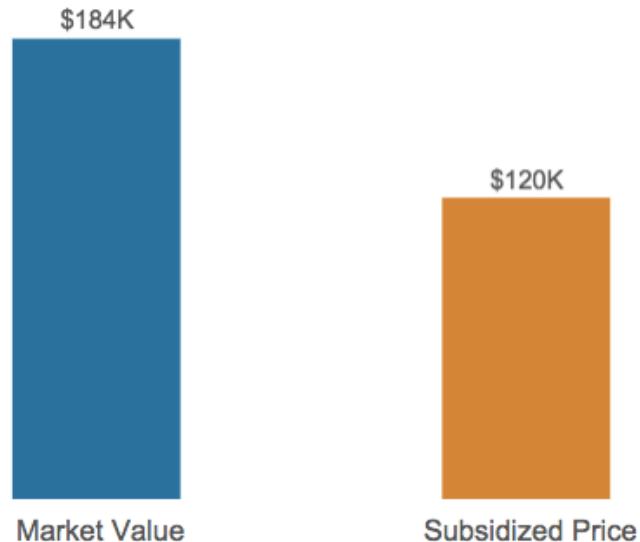
How have values and prices changed?

4,725 purchases



What are typical values and prices?

4,725 purchases





Questions?

