HomeKeeper
From local impact to national shared measurement

In a recent *Stanford Social Innovation Review*, the authors open their paper saying, “Large-scale social change requires broad cross-sector coordination, yet the social sector remains focused on the isolated intervention of individual organizations.”[i] The Cornerstone Partnership, NCB Capital Impact and a national consortium of organizations believe that they can bring this type of large-scale change to local, regional and national affordable housing efforts.

Affordable housing contributes to the economic development of distressed neighborhoods and creates vibrant and successful communities. And, there is a growing body of research that highlights the role of affordable housing in increasing residential stability and improved educational outcomes for children. But how do we bring the best practices in affordable housing from isolated local players to an entire nationwide sector? Cornerstone and their partners focus on three, key impact areas:

- Help individual organizations understand and manage data more effectively.
- Ensure data, common metrics, and best practices are shared across the entire sector.
- Influence communities and public policy at the local, regional and national levels by codifying the sector-wide impact into actionable policies and practices.

This following is a story of local impact, data management, and social change.

A Community Land Trust (CLT) is a nonprofit that works in communities to create long-term affordable housing. Think of it this way: A conservation land trust preserves land and a community land trust preserves land to work on or live on. The CLT holds the title to the land and leases it to the homeowners who live on the land. This removes the cost of the land from calculations of building price which then lowers the overall home cost. The homeowners are not renters; they own the home and build equity in it. When they go to sell the home, the lease requires them to keep the selling price affordable.

Some CLTs operate in cities and focus on sustainable urban housing where neighborhood gentrification displaces affordable housing options. Others work in rural areas to create affordable housing and affordable farm land. Some CLTs focus on housing in resort communities where local residents are pushed aside as expensive vacation homes begin to take over.

There are currently over 250 community land trusts in the United States. While every CLT is different, they all share one key characteristic: They handle an immense amount of data. They record and track land acquisitions, homes, home sales, homeowners, loans, grants, subsidies and real estate transactions on top of the day-to-day business of running a nonprofit. A single transaction creates a staggering amount of data. Now imagine the paperwork for forty, eighty or one hundred transactions. Next imagine the staff needed to manage the flow of data. Reduce the number of staff you think you need down to the actual staff number—one or two, maybe three if you are lucky, fulltime employees. You begin to understand the scope of the data management challenges. And we haven’t even begun to talk about reporting the data.

A common vision and a simple agenda

The Pacific Northwest has had an active CLT community for several years. One of the most active members is OPAL (Of People and Land) CLT and it was one of the first community land trusts in the West. Since 1989, a small staff led by Executive Director Lisa Byers has worked to provide affordable housing on Orcas Island, one of the priciest communities in the Pacific Northwest. "Our Northwest Community Land Trust Coalition—NWCLTC—meets twice a year. We continually learn from each other and have built a strong bond of trust. A common thread was the challenge of tracking information. We all had stories of the positive effects affordable housing has on our communities but lacked easy access to the data to back up the stories. If we did have the data, it would take several people combing through spreadsheets and paper files to find the numbers to really show the impact. "

The frustrations at the local level were felt at the national level, as well. The Urban Institute conducted a study of seven shared equity housing programs.[ii] The intro to the final 2010 report gives a high-level view of the difficulties in finding usable data:

> *The administrators were tasked with providing client-level data for every sale on housing prices, incomes, dates of home purchase, mortgage rates and terms, delinquencies and foreclosures, and other factors. Some sites maintained this information as administrative records in easily accessible electronic databases. Other sites undertook a labor-intensive process of searching hard-copy forms and county records to assemble this information…In some cases, we had access to a sample of homeowner records (for example, only those residents who had resold their home), while some sites were not able to provide information about some topics for any residents.*

Even before the report came out, the Northwest group was starting conversations about the need for "good data." Lisa recalls, "We had this common vision of a framework that would allow us do our work and measure outcomes at the local level, and at the same time, aggregate the data up to the state or national level. We didn't know about the tools or how we could get it done, but we knew it was a good idea and that it could benefit the community land trust movement as a whole.

Three CLTs in Washington state—OPAL, Homestead CLT in Seattle and Kulshan CLT in Bellingham—championed the project with support from the Northwest CLT Coalition and dedicated staff resources to get the project going.

Finding common ground

Sheldon Cooper, the executive director of Homestead CLT, was part of the core development group. "We were all doing similar work but using different applications and different names for stuff. When you got into the details, it was unbelievable the amount of information we would have to actually deal with." Lisa adds, "We had about fifty spreadsheets to track data, people and property — all in different ways. In 2007, we managed to get a grant for capacity building and chose a consultant to help us build the project." Thus, HomeKeeper was born.

The team chose to build a CRM (Customer Relationship Management) using the Salesforce.com platform. "It was a truly organic process. We all had different approaches to our processes. Instead of just sticking to our forms, we decided to take a shot at developing best practices. We were all willing to rethink how we worked if it could give us a unified set of data and approaches." What followed was two years of meetings to hash out the details followed by product iterations, more meetings and more iterations. Both Lisa and Sheldon jokingly commented that if they knew how long and difficult the project would ultimately be, they would have thought twice about jumping in. But they are also very clear that the end goal—shared measurement standards—was worth all the hard work.

Brad Struss of Bigger Boat Consulting sums up the issue this way, "You have incredibly knowledgeable subject matter experts from several programs and equally capable technical experts on these types of projects. The important, and time-consuming, part of the process involves coming to a shared understanding of the requirements and agreement on prioritization of the features." Bigger Boat Consulting, along with 501 Commons are the driving force behind rolling out HomeKeeper on the national level (more on that story later).

A new champion steps in

As the project progressed, it caught the attention of NCB Capital Impact (NCBCI). NCBCI is a national funder focused on programs that create a high quality of life for low-income people and communities. Affordable housing is a key goal and they saw the need for a shared-measurement system on a national level. Sheldon (of Homestead CLT) sums up NCBCI's involvement: "They came in at a critical time. We had a working prototype, but we are small organizations and had run out of resources to devote to the project. NCBCI brought the financial resources, dedicated staff, and a national focus."

The project quickly moved from a local effort to something much, much bigger. Cornerstone Partnership, a program of NCBCI with funding provided by the Ford Foundation, took over HomeKeeper. The Cornerstone Partnership is a peer network for homeownership programs that preserve long-term affordability and community stability. Charter members to the partnership include Habitat for Humanity International and the National Community Land Trust Network. Cornerstone's national plans took the prototype individual databases and condensed them into a single solution that could be easily setup for use by CLTs or any other program managing homes with long-term affordability contracts.

There are several components to the system. The HomeKeeper Workflow Management System is the operational system used by individual homeownership programs to track their day-to-day work. Key local property and transaction data feeds into the national Sector Performance Data System, which aggregates the data. The data system crunches those numbers and produces dynamic reports for the participating organizations that show their program benchmarked against their peers. HomeKeeper is currently in us by over 30 organizations across the country.

"Standards for collecting data or tracking outcomes for affordable ownership programs have been non-existent in the past," explains Tiffany Eng, manager of HomeKeeper development for Cornerstone. "Each organization decides how they are going to track information. When programs across the country are collecting different data points, it's difficult to compare a program to their peers and to the field as a whole. HomeKeeper changes this. By standardizing on how we measure data, local programs impact national efforts."

The collective impact on affordable housing

At the local level, affordable housing organizations like a CLT can better understand their particular programs and identify and respond to trends both in their program and in the industry as a whole. These organizations can strengthen the quantitative aspect of their reporting to funders, investors and other local stakeholders. For the first time, they should be able to give their funders a rigorous sense of the social impact of their investment in affordable homeownership. Best practices are no longer isolated to a few local organizations; they become part of the national dialogue. Tiffany points out, "By providing feedback on relative performance, we hope to encourage programs to more actively seek out information about why some programs are producing stronger outcomes. We expect this to lead to more widespread adoption of best practices." The data will allow affordable housing advocates to raise awareness and influence policy. And finally support robust research into the importance of affordable housing.

The efforts of a small group of local advocates have become a full-blown push to change the way we think, talk about and influence affordable housing in our local communities and on the national political stage. When asked why this data is critical to her success, Lisa Byers at OPAL says, "It's all about being able to tell a story. If we don't have the data, it's hard to tell a story that will influence public opinion or our policy makers." If data does create information, which in turn creates knowledge, which leads to understanding, affordable housing advocates are well on their way to creating lasting and large-scale change.

Project Credits

This project is the result of the collective effort of several organizations. The early vision of OPAL, Kulshan, Homestead, and the Northwest CLT Coalition paved the way for NCB Capital Impact and the Cornerstone Partnership to take it national. Along the way dozens of other affordable housing organizations have contributed their knowledge and expertise. On the system side, Bigger Boat Consulting built and continues to lead HomeKeeper development. 501 Commons installs the system for new organizations. Exponent Partners is developing the Sector Performance Data System.

About Bigger Boat Consulting

Bigger Boat Consulting builds data management solutions for nonprofit organizations. To learn more, please contact us at info@biggerboatconsulting.com or visit our website, www.biggerboatconsulting.com.

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[i] Hanleybrown, Fay, et al. Channeling Change: Making Collective Impact Work. Stanford Social Innovation Review, Jan 26, 2012.

[ii] Temkin, Kenneth, et al. *Balancing Affordability and Opportunity: An Evaluation of Affordable Homeownership Programs with Long-term Affordability Controls.* Urban Institute, October 26, 2010.