

63112\$ MORTGAGE COLLABORATIVE
NONPROFIT MEMBER APPLICATION



Organization: _____

Contact Person: _____

Title: _____

Address: _____

Telephone: _____

Nonprofit NMC Readiness Assessment:

1. Does the organization have a strategic plan to increase your homeownership line of business to achieve greater scale, community impact and increase financial performance? YES / NO
2. How is your organization currently promoting your services and attracting customers?

3. Does your organization currently spend resources on marketing? YES / NO
If yes, how much? \$_____ annually.
4. Is your organization ready to adapt new workflow systems and skillsets (if needed) to promote a fee for service model in an effort to become sustainable? YES / NO
If yes, what is your timeframe? _____
5. Is the organization interested in adding NMC technology (Mortgage Readiness and Loan Shopping Tools) into your consumer facing website? YES / NO
If yes, what is your timeframe? _____
6. Is your organization tracking operational efficiency or implementing ongoing efforts intended at increasing performance? YES / NO
If yes, how? _____
7. Is your organization currently engaging with customers via technology? YES / NO
If yes, how? _____
8. What percentage of your organization's operating sources are from the following:
Private and government grants _____% Fee for service (including contracts) _____%



9. Can your organization commit to the NMC Standard of producing a minimum of 30 new homeowners a year? Please share with us your 2018 goals: _____
_____ YES / NO
10. Can your organization pledge to implementing the NMC technology tools as soon as the customization of the tech tools are complete? YES / NO
11. Who in your organization will be responsible in implementing the NMC Fee for Service Sustainable and New Business Model? _____

Organization and Staff:

- a. What year was your nonprofit established? _____
- b. How many members currently serve on your Board of Directors? _____
- c. Is your Board of Directors open to a social entrepreneurial method of delivering your mission? _____
- d. How many staff members does your organization have? _____
- e. Please list the name & titles of your dedicated staff providing homeownership services:
- | | |
|-------------|--------------|
| Name: _____ | Title: _____ |
| Name: _____ | Title: _____ |
| Name: _____ | Title: _____ |
| Name: _____ | Title: _____ |
- f. Please list staff who have an NMLS License: _____

- g. Is your staff willing to alter work flows to become sustainable? _____
- h. What is your organization's service area(s)? Please list all counties: _____

- i. Please describe the demographic make up of your customers using percentages: _____

- j. Do you have more than one office, if so how many? _____
Please list other locations: _____
- k. What other languages does your staff provide to speak (if any)? _____



Services Offered

1. PRODUCTION GOALS

- a. What are your production goals for Pre-Purchase education, counseling and new homeowners for the next two years? Please list below:

	2018 GOALS	EXPECTED NMC LAUNCH MONTH	2019 PROJECTED
Homebuyer Education			
Post Purchase Counseling			
New Homeowners			
Realty Services			
Other			

- b. Please list previous two years actual production achieved:

	2016 ACTUAL	2017 ACTUAL
Homebuyer Education		
Post Purchase Counseling		
New Homeowners		
Realty Services		
Other		

- c. What percentage of your 2016 & 2017 new homeowner goals did your organization achieve?

2016 _____ % 2017 _____ % Achieved

- d. Approximately what percentage of homeowners will use Down Payment Assistance (DPA) programs to achieve your 2018 goals? _____

- e. Please list the DPA programs your organization is most reliant on in creating new homeowners:



2. HOMEBUYER EDUCATION

- a. How many homebuyer education classes does your organization offer a month # _____
Please indicate which curricula your organization uses: _____
- b. Average length of classes or classroom hours: _____
- c. Average attendance (number of persons) each class: _____
- d. What annual homebuyer events does your organization participate in or organize? _____

- e. What are the 2018 dates for the events? _____

- f. What online HBE does your organization offer (if any)? _____
- g. What is the major factor(s) that prevents graduates from buying (if any)? _____

3. HOMEBUYER COUNSELING

- a. Is your organization a HUD approved Counseling Agency? YES / NO
- b. Is your organization a HUD sub grantee? YES / NO
If yes, which intermediary are you affiliated with: _____
- c. Does your organization offer post purchase services or foreclosure-prevention counseling? YES / NO
- d. Do you foresee post purchase counseling continuing past 2018? YES / NO
- e. Does your organization offer HECM counseling? YES / NO
- f. Does your organization offer Debt Management counseling? YES / NO

4. LENDING SERVICES

- a. Does your organization originate 1st mortgages? YES / NO
- b. What is the most widely used 1st mortgage program or product your customers obtain?
Lender name/Program: _____
Lender name/Program: _____
Lender name/Program: _____
- c. Does your organization offer a DPA loan program to promote home ownership in your service area? YES / NO
- d. How much capital does your organization have available for DPA? _____
Terms for your DPA: _____



- e. Can your organization access other local/state DPA programs for your customers? YES / NO
If yes, please list the DPA programs and terms you rely on to assist your customers:

- f. List the lenders/banks you are currently working with or referring your customers to for their first mortgage: _____

5. REALTY SERVICES

- Does your organization offer Realty services? YES / NO
If yes, please list the names of your licensed Realtors:

6. INTERNAL SYSTEMS

- a. What software systems you are using for loan processing (if any)? _____
- b. What Client Management System (CMS) are your using to track & service your customers?

- c. What fees are your organization charging customers for services rendered below:

SERVICE	FEE (If Any)
Homebuyer Education	
Homeownership Counseling	
Lending	
Foreclosure Counseling	
Rehab Loans	
Reverse Mortgage	
Other	



Nonprofit Certifications/Licenses/National Affiliations

Community Development Financial Institution, CDFI	YES / NO
Licensed Mortgage Broker	YES / NO
Multifamily Developer	YES / NO
Real Estate Development	YES / NO

Please list National Affiliations: _____

Please list other Licenses or Certifications: _____

What Annual Conferences and/or national trainings does your staff/organization participate or attend?

Nonprofit Executive Director _____
Date

Nonprofit Homeownership Manager _____
Date

Your Next Steps:

1. Submit completed NMC Application to lupe.hernandez@springboard.org.
2. Please submit your 2018 Homeownership Business Plan and/or goals with the application.
3. The Nationwide Mortgage Collaborative, Account Executive will contact you within 72 hours to discuss your application and next steps.

Nationwide Mortgage Collaborative powered by Springboard CDFI is a network of nonprofit housing agencies focused on providing mortgage opportunities to underserved communities.

