



## 2020 HPN Member Profile

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### Welcome (Page 1)

Dear HPN Member:

To help us better understand and evaluate the capacity, impact, and goals of your organization, please complete the following membership update. Include information from subsidiaries and affiliates in all of your answers. To save your work, click on the box at the top of the form that says, "Save my progress and resume later." You will then input your email address and select a password so that you can resume your form (using that same email and password) later. **Please test that you are able to save your form early in the process.**

On the following pages, you will see your organization's prior year information in the left-hand column. These are read-only fields. **(If last year's data appears incorrect, please send an email to Jessica Davidson Sawyer at [davidson@housingpartnership.net](mailto:davidson@housingpartnership.net) outlining the discrepancy.)**

Input this year's information in the right-hand column. Please fill out ALL blank fields in the right-hand column using the prior year data (left-hand column) as a guide. For those cases where your answers will likely be the same year-over-year (e.g., what business lines you offer) all you need to do is confirm that the data carried over from last year into the right-hand column is correct.

Please note that the online form is dynamic, so some questions only appear if you indicate that you have a particular business line (e.g., lending). Hidden help text and definitions will appear when you click in the text boxes on the right-hand side.

This document may assist you in gathering data for the profile and lists all of the profile questions and definitions. Once you have gathered all of your information, return to the online form to enter the data.

Thank you for reviewing and updating your annual member profile. In general, member data submitted in your profile is used within HPN, as well as shared with HPN's affiliated organizations and social enterprises such as HPN Select and the Housing Partnership Insurance Exchange, in accordance with our data sharing agreements. HPN may also share member data it considers non-sensitive with HPN members, funders, policymakers, and other relevant external parties. Through the collection and dissemination of member data, HPN seeks to further its mission by, for example, promoting collaboration and peer exchange across the membership, advancing the policy goals of HPN's network, and demonstrating the network's impact to acquire important funding. For more information on how HPN intends to use member data and what member data it considers to be sensitive, please contact us.

If you have any questions, need a password reset, or if you are unsure how to respond to a question in the profile, please contact Jessica Davidson-Sawyer at [davidson@housingpartnership.net](mailto:davidson@housingpartnership.net) or 617.259.1827.

Thank you!



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### Page 2 - Basic Company Info

#### Organization Name and Contact Info

1. Company Name
2. Headquarters Mailing Street
3. City
4. State
5. Zip Code (9 Digit)
6. Main Phone Number
7. Company Website

#### Member Profile Contact Info

##### *Person Completing this Form*

*Please indicate the name and email of the person completing this form:*

1. Name of person completing this form:
2. Email of person completing this form:

##### *Primary Contact*

*Please indicate the name and email of the primary contact for the HPN member profile submission, if different from above*

1. Name of Member Profile Primary Contact
2. Email of Member Profile Primary Contact

#### HPN Website Page & Logo

*Please take a moment to look at your organization's page on the HPN website by copying the below link into a new browser window [note: you will only see a link in the live form with your organization's prefilled data]. This page contains high-level business line information, social media links, CEO name, contact information, and logo. Please note that right now what you are seeing is what was submitted LAST YEAR. Your data on the website will be updated with any changes once an HPN staff member approves this year's profile submission.*

*If you need your logo updated on the website, please email a high resolution color AND transparent (white) version of your logo (e.g., jpeg, png) to Saayali at [rege@housingpartnership.net](mailto:rege@housingpartnership.net).*

#### General Information

1. Description (maximum of 2000 characters)

*This blurb will appear on your organization's page on the HPN website. This is often your standard marketing language.*

2. Do you have organization-wide targets for percentage of purchases made from Minority Business Enterprises (MBEs), Women Business Enterprises (WBEs), and/ or Veteran Owned Businesses (VBEs)?
  - a. Yes
  - b. No
  - c. Exploring
  - d. Unknown

## Financial Information

### Consolidated and Parent Financial Statements

Please enter the following information from your consolidated and parent financial statements for the last fiscal year (in US dollars). Beginning this year, we are also asking you to upload your company's audited consolidated financial statements from the last fiscal year if HPN has not already collected them (e.g., through our Housing Counseling program or the Fund). If you upload your audited financials, you may leave the 4 consolidated audit questions below blank, and HPN will fill them in, if you prefer.

3. Last Fiscal Year End Dated:
4. Most Recent Consolidated Audit Received by HPN:
 

*If this field (Most Recent Consolidated Audit Received by HPN) matches your Last Fiscal Year from above, then you do not need to upload your audited consolidated financial statements again.*
5. Please upload your audited consolidated financial statements from the last fiscal year:
6. If your audited consolidated financial statements from the last fiscal year have not been finalized, please provide an estimate of when they will be available (e.g., July 2020):
7. Total Revenue for 2019 Fiscal Year (US Dollars)--All Consolidated Entities:
8. Total Expenses for 2019 Fiscal Year (US Dollars)--All Consolidated Entities:
9. Total Net Assets for 2019 Fiscal Year (US Dollars)--All Consolidated Entities:
10. Total On-Balance Sheet Assets for 2019 Fiscal Year (US Dollars)--All Consolidated Entities:
11. Total Revenue for 2019 Fiscal Year (US Dollars)—Parent Corporation Only:
12. Amount, if any, of pass-through grants included in 2019 Parent Corporation Revenue, e.g., capital grants passed through to project entity:
13. Total Expenses for 2019 Fiscal Year (US Dollars)--Parent Corporation Only:
14. Amount, if any, of grants made included in 2019 Parent Corporation Expenses:
15. Total Net Assets for 2019 Fiscal Year (US Dollars)--Parent Corporation Only:
16. Total On-Balance Sheet Assets for 2019 Fiscal Year (US Dollars)--Parent Corporation Only:

### Revenue Sources in Operating Budget

Please enter your earned income and contributed income as a percentage of your current operating budget's total revenue.

17. Earned Income (% of operating revenue):
 

*Earned income is defined as payments received in direct exchange for a product, service, or privilege. Examples include government contracts, fee-for-service work, service contracts, interest/investment income, rental income, and business income.*
18. Contributed Income (% of operating revenue):
 

*Contributed income is defined as cash or in-kind resources that were given (not loaned) to the organization in the form of a gift or grant, and does NOT include earned income, loans, or investor proceeds. Examples include fundraising dollars, pledges and donations, grants from governments, foundations, and/or corporations, as well as in-kind grants such as facility usage. Include previous years' contributions that were released/are expected to be released from restrictions in the current year.*

## Capital Raising/Funding

19. Does your organization raise equity capital for its consolidated entity and/or subsidiaries?
- Yes
  - No

*Please answer yes if your organization makes use of Mission Related Investments (MRIs), Program Related Investments (PRIs), Equity Equivalents (EQ2s), Preferred Stock, Common Stock, or engages in any other type of equity capital raising.*

20. How much equity capital did your organization raise in its last fiscal year (for all companies/subsidiaries)?

## New, Expanding, and Closing Business Lines

*Rather than requiring you to review all business line options each year and state whether your organization is currently active in them, we have reduced this section to three questions where you can summarize any business line changes (additions, ramp ups, endings). We hope that this will be a less burdensome way to report these infrequent changes, as well as provide HPN with more detail about your work so that we can leverage this information for peer exchanges and in connecting members who do similar work.*

1. NEW BUSINESS LINES: Will your organization start (or has it recently launched) any of the following business lines/areas of work in the 2019 or 2020 calendar years, or does it plan to in future years?
- Operating States/Geographic Footprint
  - Industry Certifications/Memberships
  - Real Estate Development-Rental
  - Real Estate Development-For-Sale/Homeownership
  - Real Estate Development-Naturally Occurring Affordable Housing (NOAH)
  - Real Estate Development-Market-Rate
  - Real Estate Development-Commercial
  - Real Estate Development-Other
  - Property Management
  - Resident Services-Programs Offered
  - Resident Services-Populations Targeted
  - Resident Services-Health Services/Partnerships
  - Housing Counseling
  - Lending-Commercial and/or Development
  - Lending-Consumer Mortgage
  - Lending-Other
  - New Markets Tax Credit Financing (as a CDE)
  - Equity Syndication
  - Other
  - None of the Above
  - Unknown

*Please select the checkbox next to any areas where you have added a new business line this year or last year or plan to in the next 0-3 years. For operating states/geographic footprint, check the box if you are/will work in any new states or areas. For industry certifications/memberships, check the box if you have received/applied for a new certification/membership.*

2. Please provide details about NEW BUSINESS LINES you have/will start offering (5000 character limit): [insert text]

*For any of the items checked above, please provide details of the new activities(s), and when the changes occurred/will occur.*

3. Who can we contact to learn more details about your NEW BUSINESS LINES? Please provide the name(s) and email address(es) of the staff we should contact (2000 character limit): [insert text]

*HPN staff may follow up on these changes to get additional information for data collection or peer exchange purposes*

4. EXPANDING BUSINESS LINES: Will your company significantly ramp up (or has it recently done so) any of its existing business lines/areas of work in the 2019 or 2020 calendar years, or does it plan to in future years?

- a. Operating States/Geographic Footprint
- b. Real Estate Development-Rental
- c. Real Estate Development-For-Sale/Homeownership
- d. Real Estate Development-Naturally Occurring Affordable Housing (NOAH)
- e. Real Estate Development-Market-Rate
- f. Real Estate Development-Commercial
- g. Real Estate Development-Other
- h. Property Management
- i. Resident Services-Programs Offered
- j. Resident Services-Populations Targeted
- k. Resident Services-Health Services/Partnerships
- l. Housing Counseling
- m. Lending-Commercial and/or Development
- n. Lending-Consumer Mortgage
- o. Lending-Other
- p. New Markets Tax Credit Financing (as a CDE)
- q. Equity Syndication
- r. Other
- s. None of the Above
- t. Unknown

*Please select the checkbox next to any areas where you have significantly expanded your work/activity this year or last year or plan to in the next 0-3 years. For operating states/geographic footprint, this could be states/areas where you are expanding your work (but you already had a presence in). Note: We recognize that most companies are continually expanding what they are doing. This question is meant to capture a significant change that will steepen your growth trajectory in a particular area.*

5. Please provide details about EXPANDING BUSINESS LINES you have/will significantly ramp up (5000 character limit): [insert text]

*For any of the items checked above, please provide details of the significantly expanded activities(s), and when the changes occurred/will occur. Details on your specific pipeline numbers (i.e. units in construction at the end of year) are captured in a subsequent section. This question is intended to capture the general summary of your expanded work.*

6. Who can we contact to learn more details about your EXPANDING BUSINESS LINES? Please provide the name(s) and email address(es) of the staff we should contact (2000 character limit): [insert text]

*HPN staff may follow up on these changes to get additional information for data collection or peer exchange purposes*

7. CLOSING BUSINESS LINES: Will your company cease offering (or has it recently done so) any of the following business lines/areas of work in the 2019 or 2020 calendar years, or does it plan to in future years?

- a. Operating States/Geographic Footprint
- b. Industry Certifications/Memberships
- c. Real Estate Development-Rental
- d. Real Estate Development-For-Sale/Homeownership
- e. Real Estate Development-Naturally Occurring Affordable Housing (NOAH)
- f. Real Estate Development-Market-Rate
- g. Real Estate Development-Commercial
- h. Real Estate Development-Other
- i. Property Management
- j. Resident Services-Programs Offered
- k. Resident Services-Populations Targeted
- l. Resident Services-Health Services/Partnerships
- m. Housing Counseling
- n. Lending-Commercial and/or Development
- o. Lending-Consumer Mortgage
- p. Lending-Other
- q. New Markets Tax Credit Financing (as a CDE)
- r. Equity Syndication
- s. Other
- t. None of the Above
- u. Unknown

*Please select the checkbox next to any areas where you have ceased offering services this year or last year or plan to in the next 0-3 years. For operating states/geographic footprint, check the box if you have/will stop working in any states/areas. For industry certifications/memberships, check the box if you will not renew any previous certifications/memberships.*

8. Please provide details about CLOSING BUSINESS LINES you have/will end (stop offering) (5000 character limit): [insert text]

*For any of the items checked above, please provide details of the ceased activities(s), and when the changes occurred/will occur:*

9. Who can we contact to learn more details about your CLOSING BUSINESS LINES? Please provide the name(s) and email address(es) of the staff we should contact (2000 character limit): [insert text]

*HPN staff may follow up on these changes to get additional information for data collection or peer exchange purposes*



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### Page 3 - Employee and Board Information

#### CEO/President/Executive Director

1. Name
2. Title
3. CEO Gender
4. CEO Race/Ethnicity
  - a. African American/Black
  - b. Asian
  - c. Asian Indian
  - d. Caucasian/White
  - e. Hispanic/Latino
  - f. Native American/American Indian
  - g. Native Hawaiian or Pacific Islander
  - h. Bi-Racial/Multi-Racial
  - i. Prefer not to say
  - j. Other [insert]

#### Board of Directors

1. Number of members on your Board of Directors or other governing body:
2. Number of female members on your Board of Directors or other governing body:
3. Number of male members on your Board of Directors or other governing body:
4. Number of non-binary members on your Board of Directors or other governing body:  
*Number of Board of Directors members who identify as having a non-binary gender*
5. Number of Board of Directors (or other governing body) members who identify as persons of color and/or ethnic minorities:
6. Do you have any Board of Directors members who are experts in the health sector?
  - a. Yes
  - b. No
  - c. Unknown

*Answer "yes" if you have a medical professional on your board and also if you have a board member who is able to help your organization with things such as navigating partnerships with healthcare entities, soliciting funding requests from the health sector, etc.*
7. Do you have any Board of Directors members who are from the higher education sector (e.g., colleges, universities, post-secondary training institutions, etc.)?
  - a. Yes
  - b. No
  - c. Unknown

## Executive Team

1. Total number of executive management team members:
2. Number of female executive management team members:
3. Number of male executive management team members:
4. Number of non-binary executive management team members:  
*Number of executive management team members who identify as having a non-binary gender*
5. Number of executive management team members who identify as persons of color and/or ethnic minorities:

## Employees

1. Number of People Employed (including subsidiaries and affiliates):  
*List the current number of PEOPLE employed by your organization (NOT FTE), including all subsidiaries and affiliates. The total number of employees here should equal all employees listed in each the race/ethnicity and gender EEOC sections below.*
2. Full-Time Equivalent Employees (including subsidiaries and affiliates):  
*List the current full-time equivalent (FTE) number of employees at your organization, including all subsidiaries and affiliates.*

### Employee Race/Ethnicity and Gender

*We would like to be able to provide aggregated information on the race/ethnicity and gender of both the employees and residents of our members. Several members have asked for this type of information, and we think it will help us to better assess whether our staff and leaders reflect the people we are serving and to help measure our network's progress in increasing the diversity of the field at all levels of leadership. If you have the information listed below available, we would greatly appreciate your sharing it with us. Rest assured, we will not externally share or publish information provided by individual member organizations in an identifiable way.*

*Note: Before you complete the below information, please ensure that you have filled out the "Number of People Employed" field above.*

*Each section below (Race/Ethnicity of Employees and Gender of Employees) is set up to equal your "Number of People Employed." When there is no race or gender data entered, the "unknowns" will equal your "Number of People Employed." Unknowns will decrease as you add in employee race/gender information.*

3. If you prefer, you may attach a file containing your latest EEOC data. [UPLOAD]

### Race/Ethnicity of Employees (EEOC Categories)

4. Number of employees who identify as Hispanic or Latino/a:  
*A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race.*
5. Number of employees who identify as Asian (Not Hispanic or Latino/a):  
*A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.*
6. Number of employees who identify as Black or African American (Not Hispanic or Latino/a):  
*A person having origins in any of the black racial groups of Africa.*



7. Number of employees who identify as Native American or Alaska Native (Not Hispanic or Latino/a):  
*A person having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.*
8. Number of employees who identify as Native Hawaiian or Pacific Islander (Not Hispanic or Latino/a):  
*A person having origins in any of the peoples of Hawaii, Guam, Samoa, or other Pacific Islands*
9. Number of employees who identify as White (Not Hispanic or Latino/a):  
*A person having origins in any of the original peoples of Europe, the Middle East, or North Africa.*
10. Number of employees who identify as having two or more races (Not Hispanic or Latino/a):  
*All persons who identify with more than one of the above five races.*
11. [Auto-calculated] Number of employees who have not reported their race or ethnicity (i.e. race/ethnicity is unknown):  
*This field is auto-calculated and defaults to your "Number of People Employed" if no race/ethnicity data is entered.*

*Please note: If the "Number of employees who have not reported their race or ethnicity" is a negative number, please verify that your "Number of People Employed" above equals the total number of employees entered in the Race/Ethnicity of Employees section.*

### **Gender of Employees (EEOC Categories)**

1. Number of employees who identify as female:  
*All persons who identify as female*
2. Number of employees who identify as male:  
*All persons who identify as male*
3. Number of employees who identify as non-binary:  
*All persons who identify as having a non-binary gender*
4. [Auto-calculated] Number of employees who have not reported their gender (i.e. gender is unknown):  
*This field is auto-calculated and defaults to your "Number of People Employed" if no gender data is entered. Note: Last year this field also included non-binary individuals.*

*Please note: If the "Number of employees who have not reported their gender" is a negative number, please verify that your "Number of People Employed" above equals the total number of employees entered in the Gender of Employees section.*



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### Page 4 - Community Programs

#### Community Programs

*Note: Community Programs are those that your organization offers to the community at-large, not programs that are restricted to residents living in your properties--resident programs are tracked later in a section called Resident Services.*

*Please select all active business lines/programs below*

#### Housing and Financial Counseling

1. Does your organization offer housing and/or financial counseling?
  - a. Active Business Line
  - b. Inactive Business Line
  - c. Never Had This Business Line
2. HUD 9902 All FY18:  
*The number of households that your organization counseled in the last HUD fiscal year, per the HUD Housing Counseling Form 9902 reporting criteria - ALL column.*
3. Households Counseled, per 9902, Inception through end of HUD FY18:  
*The number of households that your organization has counseled from inception through the end of the last HUD fiscal year, per the HUD Housing Counseling Form 9902 reporting criteria - ALL column. If you do not have access to data since inception, count from as far back as you are able.*

#### General Community Services/Programs

1. Does your organization offer any of the following programs/services (select all that apply)?
  - a. Economic Mobility
  - b. Home Repair/Weatherization (Owner-Occupied)
  - c. Job Training
  - d. None of the Above
2. Owner-Occupied, Single-Family Homes Repaired and/or Weatherized in 2019 (in units):  
*The number of owner-occupied, single-family homes that your organization has repaired--including weatherization--in the last calendar year (repair valued at over \$2500 per home). Do not include units that your organization owns or repaired in order to sell.*
3. Total Owner-Occupied, Single-Family Homes Repaired and/or Weatherized, Inception through 12/31/19 (in units):  
*The number of owner-occupied, single-family homes that your organization has repaired--including weatherization--from inception through the end of the last calendar year (repair valued at over \$2500 per home). Do not include units that your organization owns or repaired in order to sell. If you do not have access to data since inception, count from as far back as you are able.*



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### Page 5 - Housing Development and Rehabilitation

#### Housing Development & Rehabilitation

*Please include affordable and market-rate housing, along with development by all subsidiaries and affiliates when answering these questions. Do not respond to this section if your organization only finances affordable housing.*

1. Are you a real estate developer/owner (i.e., own or play a role in the construction/rehab of any rental or homeownership housing or commercial buildings) and/or have you been one in the past?
  - a. Yes
  - b. No

*Please select "yes" whether this is a current or inactive (past) business line.*

#### Homeownership/For-Sale Housing Development

*Please include affordable and market-rate housing, along with development by all subsidiaries and affiliates when answering these questions. Do not respond to this section if your organization only finances affordable housing.*

1. Do you develop Single-Family For-Sale Housing (defined as 1-4 unit buildings)?
  - a. Active Business Line as Lead Developer
  - b. Active Business Line as Consultant/TA provider/Other
  - c. Inactive Business Line as Lead Developer (i.e. past production)
  - d. Inactive Business Line as Consultant/TA provider/Other (i.e. past production)
  - e. Never Had This Business Line
2. Do you develop Multi-Family For-Sale Housing (buildings with 5 or more units, e.g., condos, co-ops)?
  - a. Active Business Line as Lead Developer
  - b. Active Business Line as Consultant/TA provider/Other
  - c. Inactive Business Line as Lead Developer (i.e. past production)
  - d. Inactive Business Line as Consultant/TA provider/Other (i.e. past production)
  - e. Never Had This Business Line

*Both actives can be selected at the same time*

*Both actives or inactives can be selected at the same time*

#### Homeownership/For-Sale Production

3. Homeownership/For-Sale Units Sold in 2019 (New Construction AND Acquisitions):

*The total number of homeownership/for-sale units your organization sold during the last calendar year. Include single-family and multi-family new construction and acquisition/rehab. For new construction, only count units for which your organization (or subsidiary/affiliate) was the lead developer. Include hybrid-tenure units that have been sold.*

4. Number of Homeownership/For-Sale Units Sold in 2019 that were New Construction:

*The total number of homeownership/for-sale units your organization sold during the last calendar year that were NEW CONSTRUCTION. Include both single-family and multi-family homes sold and hybrid-tenure units that have been sold. Only count units for which your organization (or subsidiary/affiliate) was the lead developer.*

5. Number of Homeownership/For-Sale Units Sold in 2019 that were Acquisitions:

*The total number of homeownership/for-sale units your organization sold during the last calendar year that were ACQUISITIONS/REHABS. Include both single-family and multi-family homes sold and hybrid-tenure units that have been sold.*

6. Homeownership/For-Sale Units in Construction/Rehab or Unsold on 12/31/19 (New Construction AND Acquisitions):

*The total number of homeownership/for-sale units in construction/rehab or unsold at the end of the last calendar year. Include single-family and multi-family new construction and acquisition/rehab. For new construction, only count units for which your organization (or subsidiary/affiliate) is the lead developer. Note: Last year this field was called "in development" but we changed it to "in construction/rehab" due to feedback from members.*

7. Number of Homeownership/For-Sale Units in Construction or Unsold on 12/31/19 that were New Construction:

*The total number of homeownership/for-sale units in construction or unsold at the end of the last calendar year that were NEW CONSTRUCTION. Include both single-family and multi-family homes. Only count units for which your organization (or subsidiary/affiliate) is the lead developer. Note: Last year this field was called "in development" but we changed it to "in construction/rehab" due to feedback from members.*

8. Number of Homeownership/For-Sale Units in Rehab or Unsold on 12/31/19 that were Acquisitions:

*The total number of homeownership/for-sale units in rehab or unsold at the end of the last calendar year that were ACQUISITIONS/REHABS. Include both single-family and multi-family homes. Note: Last year this field was called "in development" but we changed it to "in construction/rehab" due to feedback from members.*

9. Homeownership/For-Sale Units in Pre-Development on 12/31/19:

*The total number of homeownership/for-sale units in pre-development at the end of the last calendar year. Include single-family and multi-family new construction and acquisition/rehab. For new construction, only count units for which your organization (or subsidiary/affiliate) is the lead developer. Predevelopment is defined as the period prior to the closing on the construction loan. Examples of properties considered in pre-development are: entitled land but unassembled financing, site is owned but in entitlement.*

10. Homeownership/For-Sale Units Sold, Inception through 12/31/19:

*The total number of homeownership/for-sale units your organization has sold from inception through the end of the last calendar year. Include single-family and multi-family new construction and acquisition/rehab. For new construction, only count units for which your organization (or subsidiary/affiliate) was the lead developer. Include hybrid-tenure units that have been sold. If you do not have access to data since inception, count from as far back as you are able.*

11. Additional Homeownership/For-Sale Units Produced in 2019--Contributed to Development (consulting, TA, construction-only, etc.):

*Number of homeownership/for-sale units for which your organization contributed to the development in the last calendar year but was not the lead developer – e.g., as consultant, technical assistance provider, or construction-only services. Only include units sold, including hybrid-tenure units that have been sold.*

12. Total Additional Homeownership/For-Sale Units, Inception through 12/31/19--Contributed to Development (consulting, TA, construction-only, etc.):

*Number of homeownership/for-sale units, from inception through the end of the last calendar year, for which your organization contributed to the development but was not the lead developer – e.g., as consultant, technical assistance provider, or construction-only services. Only include units sold, including hybrid-tenure units that have been sold. If you do not have access to data since inception, count from as far back as you are able.*

## **For-Sale Development Homebuyer Race/Ethnicity**

*HPN has been in conversations with funders seeking to end the racial homeownership gap. It would be valuable for us to have available the race/ethnicity information of our members' for-sale activity (homes developed/sold) in order to demonstrate our work in this area and how this compares to national averages. Please provide the following if you have it available. Estimates are fine, as we will primarily be looking at this information on an aggregated basis (all members, geographic regions, etc.).*

*Note: Each section on the right (homebuyer ethnicity and homebuyer race) is set up to equal 100%. When there is no data, the "unknowns" will be 100%, and unknowns will decrease as you add in "known" information.*

### **Homebuyer Ethnicity**

1. Percentage of Hispanic or Latino/a homebuyers for homes sold in 2019:  
*Percentage of Hispanic/Latino homebuyers out of all homebuyers for homes sold in the last calendar year*
2. Percentage of homebuyers that are NOT Hispanic or Latino/a for homes sold in 2019:  
*Percentage of homebuyers that are not Hispanic/Latino out of all homebuyers for homes sold in the last calendar year*
3. [Auto-calculated] Percentage of homebuyers whose Hispanic or Latino/a identification is unknown for homes sold in 2019:  
*This field is auto-calculated and defaults to 100% if no data is entered.*

### **Homebuyer Race**

4. Percentage of American Indian or Alaska Native homebuyers for homes sold in 2019:  
*Percentage of American Indian or Alaska Native homebuyers out of all homebuyers for homes sold in the last calendar year*
5. Percentage of Asian homebuyers for homes sold in 2019:  
*Percentage of Asian homebuyers out of all homebuyers for homes sold in the last calendar year. Includes homebuyers identifying as Asian Indian, Chinese, Filipino, Japanese, Korean, Vietnamese, etc.*
6. Percentage of Black or African American homebuyers for homes sold in 2019:  
*Percentage of Black or African American homebuyers out of all homebuyers for homes sold in the last calendar year*
7. Percentage of Native Hawaiian or Other Pacific Islander homebuyers for homes sold in 2019:  
*Percentage of Native Hawaiian or Other Pacific Islander homebuyers out of all homebuyers for homes sold in the last calendar year. Includes homebuyers identifying as Native Hawaiian, Guamanian or Chamorro, Samoan, etc.*
8. Percentage of White homebuyers for homes sold in 2019:  
*Percentage of White homebuyers out of all homebuyers for homes sold in the last calendar year*
9. Percentage of homebuyers who identify as having two or more races for homes sold in 2019:  
*Percentage of multi-racial homebuyers out of all homebuyers for homes sold in the last calendar year*

10. [Auto-calculated] Percentage of homebuyers whose race is unknown for homes sold in 2019:  
*This field is auto-calculated and defaults to 100% if no data is entered.*

## Rental Housing Development

*Please include affordable, transitional, and market-rate housing, along with development by all subsidiaries and affiliates when answering these questions. Do not respond to this section if your organization only finances affordable housing.*

1. Do you develop, rehab, and/or own Multi-Family Rental Housing (buildings with 5 or more units)?
  - a. Active Business Line as Lead Developer
  - b. Active Business Line as Consultant/TA provider/Other
  - c. Inactive Business Line as Lead Developer (i.e. past production)
  - d. Inactive Business Line as Consultant/TA provider/Other (i.e. past production)
  - e. Never Had This Business Line

*Both actives or inactives can be selected at the same time*

2. Do you develop, rehab, and/or own Single-Family Rental Housing (defined as 1-4 unit buildings)?
  - a. Active Business Line as Lead Developer
  - b. Active Business Line as Consultant/TA provider/Other
  - c. Inactive Business Line as Lead Developer (i.e. past production)
  - d. Inactive Business Line as Consultant/TA provider/Other (i.e. past production)
  - e. Never Had This Business Line

*Both actives or inactives can be selected at the same time*

## Rental Production

1. Number of Rental Properties Owned on 12/31/19:  
*The number of rental properties/projects that your organization owned as of the end of the last calendar year, including subsidiaries and affiliates. Please count based on the number of legal entities that you own (e.g., a "property" may be more than one building/structure). Only include single-family and multi-family rental properties that are ready for and/or currently house residents.*
2. Number of Rental Units Owned on 12/31/19:  
*The number of rental UNITS that your organization owned as of the end of the last calendar year, including subsidiaries and affiliates. Only include multi-family and single-family rental units that are ready for and/or currently house residents. Include any hybrid tenure units that are still in the rental stage.*
3. Rental Units Produced in 2019:  
*The total number of multi-family AND single-family rental units your organization produced during the last calendar year. Only count completed development (ready for and/or currently house residents) for which your organization (or subsidiary/affiliate) was the lead developer. Include new construction, acquisition, significant rehab/reconstruction, and any hybrid tenure units that are still in the rental stage.*
4. Number of Rental Units Produced in 2019 that were New Construction:  
*The total number of multi-family AND single-family rental units your organization produced during the last calendar year that were NEW CONSTRUCTION. Only count completed development (ready for and/or currently house residents) for which your organization (or subsidiary/affiliate) was the lead developer. Include any hybrid tenure units that are still in the rental stage.*
5. Number of Rental Units Produced in 2019 that were Acquisitions or Significant Rehabs:  
*The total number of multi-family AND single-family rental units your organization produced during the last calendar year that were ACQUISITIONS/REHABS or SIGNIFICANT REHABS. Only count*

*completed development (ready for and/or currently house residents) for which your organization (or subsidiary/affiliate) was the lead developer. Include any hybrid tenure units that are still in the rental stage.*

6. Rental Units in Construction/Rehab on 12/31/19:

*The total number of rental units in construction/rehab at the end of the last calendar year. Include single-family and multi-family new construction, acquisition, significant rehab/reconstruction, and any hybrid tenure units that are still in the rental stage. Only count units for which your organization (or subsidiary/affiliate) is the lead developer. Note: Last year this field was called "in development" but we changed it to "in construction/rehab" due to feedback from members.*

7. Number of Rental Units in Construction on 12/31/19 that were New Construction:

*The total number of rental units in construction at the end of the last calendar year that were NEW CONSTRUCTION. Include single-family and multi-family homes and any hybrid tenure units that are still in the rental stage. Only count units for which your organization (or subsidiary/affiliate) is the lead developer. Note: Last year this field was called "in development" but we changed it to "in construction/rehab" due to feedback from members.*

8. Number of Rental Units in Rehab on 12/31/19 that were Acquisitions or Significant Rehabs:

*The total number of rental units in rehab at the end of the last calendar year that were ACQUISITIONS/REHABS or SIGNIFICANT REHABS. Include single-family and multi-family homes and any hybrid tenure units that are still in the rental stage. Only count units for which your organization (or subsidiary/affiliate) is the lead developer. Note: Last year this field was called "in development" but we changed it to "in construction/rehab" due to feedback from members.*

9. Rental Units in Pre-Development on 12/31/19:

*The total number of rental units in pre-development at the end of the last calendar year. Include single-family and multi-family new construction, acquisition, significant rehab/reconstruction, and any hybrid tenure units that are still in the rental stage. Only count units for which your organization (or subsidiary/affiliate) is the lead developer. Predevelopment is defined as the period prior to the closing on the construction loan. Examples of properties considered in pre-development are: entitled land but unassembled financing, site is owned but in entitlement.*

10. Rental Units Produced, Inception through 12/31/19:

*The total number of multi-family and single-family rental units your organization has produced from inception through the end of the last calendar year. Only count completed development for which your organization (or subsidiary/affiliate) was the lead developer. Include new construction, acquisition/rehab, and any hybrid tenure units that are still in the rental stage. Do not double-count units (e.g., if you constructed the building in the past and later rehabbed it, the units should only be counted once.) If you do not have access to data since inception, count from as far back as you are able.*

11. Additional Rental Units Produced in 2019--Contributed to Development (consulting, TA, construction-only, etc.):

*Number of rental units for which your organization contributed to the development in the last calendar year but was not the lead developer – e.g., as consultant, technical assistance provider, or construction-only services. Include multi-family and single-family rental development and any hybrid tenure units that are still in the rental stage.*

12. Total Additional Rental Units, Inception through 12/31/19--Contributed to Development (consulting, TA, construction-only, etc.):

*Number of rental units, from inception through the end of the last calendar year, for which your organization contributed to the development but was not the lead developer – e.g., as consultant, technical assistance provider, or construction-only services. Include multi-family and single-family rental development and any hybrid tenure units that are still in the rental stage. If you do not have access to data since inception, count from as far back as you are able.*

## **Naturally Occurring Affordable Housing (NOAH)**

1. Does your organization own any rental properties/units that are Naturally Occurring Affordable Housing (NOAH)?

- a. Yes
- b. No
- c. Exploring
- d. Unknown

*NOAH is housing that is affordable without being supported by public subsidies such as low-income housing tax credits. It is sometimes further defined as decent, safe, and affordable workforce housing for residents making between 60% of the area median income (AMI) and 100% of AMI (or in high cost markets up to 120% of the AMI).*

2. How many NOAH rental PROPERTIES did your organization own on 12/31/19?

*The number of rental NOAH properties/projects that your organization owned as of the end of the last calendar year, including subsidiaries and affiliates. Please count based on the number of legal entities that you own (e.g., a "property" may be more than one building/structure). Only include single-family and multi-family rental NOAH properties that are ready for and/or currently house residents.*

3. How many NOAH rental UNITS did your organization own on 12/31/19?

*The number of rental NOAH units that your organization owned as of the end of the last calendar year, including subsidiaries and affiliates. Only include multi-family and single-family rental NOAH units that are ready for and/or currently house residents. Include any hybrid tenure NOAH units that are still in the rental stage.*

## Rental Housing Resident Information

1. Rental Consumer Type(s) - Does your organization develop/own rental housing that focuses on either of the following populations?
- a. Housing for individuals with autism
  - b. Housing for individuals in recovery (from substance misuse)
  - c. None of the above

*Note: These are new additions to our "rental consumer type" list. A complete list of "rental consumer types" will be available to update in subsequent years.*

### Resident Race/Ethnicity

*What is the racial/ethnic breakdown of residents living in your rental properties Estimates are fine.*

*Note: Each section on the right is set up to equal 100%. When there is no data, the "unknowns" will be 100%, and unknowns will decrease as you add in "known" information.*

2. Do you track Hispanic/Latino identity of your residents as a separate question from race or do you integrate it into racial identity questions?
- a. Track resident Hispanic/Latino identity separate from race
  - b. Track resident Hispanic/Latino identity and race combined in one question
  - c. Do not track resident ethnicity/race
  - d. Unknown

*Do you ask all residents whether they identify as Hispanic/Latino and then separately ask them what race they identify as (e.g. similar to HMDA reporting)? Or do you combine ethnicity and race reporting into one question (e.g., similar to EEOC reporting)?*

### Resident Ethnicity

3. Percentage of residents who identify as Hispanic or Latino/a:

*Percentage of all residents living in your properties who identify as Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin regardless of race.*

4. Percentage of residents who DO NOT identify as Hispanic or Latino/a:

*THIS QUESTION IS ONLY SEEN IF YOU INDICATE THAT YOU TRACK HISPANIC/LATINO IDENTITY SEPARATE FROM RACE*



5. [Auto-calculated] Percentage of residents whose Hispanic or Latino/a identity is unknown:  
*This field is auto-calculated and defaults to 100% if no data is entered. THIS QUESTION IS ONLY SEEN IF YOU INDICATE THAT YOU TRACK HISPANIC/LATINO IDENTITY SEPARATE FROM RACE*

### **Resident Race**

6. Percentage of residents who identify as Asian:  
*Percentage of all residents living in your properties having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent, including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.*
7. Percentage of residents who identify as Black or African American:  
*Percentage of all residents living in your properties having origins in any of the black racial groups of Africa.*
8. Percentage of residents who identify as Native American or Alaska Native:  
*Percentage of all residents living in your properties having origins in any of the original peoples of North and South America (including Central America), and who maintain tribal affiliation or community attachment.*
9. Percentage of residents who identify as Native Hawaiian or Pacific Islander:  
*Percentage of all residents living in your properties having origins in any of the peoples of Hawaii, Guam, Samoa, or other Pacific Islands*
10. Percentage of residents who identify as White or Caucasian:  
*Percentage of all residents living in your properties having origins in any of the original peoples of Europe, the Middle East, or North Africa.*
11. Percentage of residents who identify as having two or more races:  
*Percentage of all residents living in your properties who identify with more than one of the above races/ethnicities.*
12. [Auto-calculated] Percentage of residents whose race or ethnicity is unknown:  
*This field is auto-calculated and defaults to 100% if no data is entered.*

## 2019 HPN Member Profile

### Page 6 - Other Development Questions and Asset Management

#### Other Development Questions

1. Does your organization develop modular housing?
  - a. Yes
  - b. No
  - c. Exploring
  - d. Unknown

*Modular buildings and modular homes are prefabricated buildings or houses that consist of repeated sections called modules. "Modular" is a construction method that involves constructing sections (modules) away from the building site, then delivering them to the intended site for joining/completion.*

2. Are the modular homes you develop rental or for-sale?
  - a. Rental
  - b. For-Sale
  - c. Both Rental and For-Sale
  - d. Unknown
3. Does your organization develop manufactured housing?
  - a. Yes
  - b. No
  - c. Exploring
  - d. Unknown

*Manufactured homes are built entirely inside factories and then transported to sites of use, as opposed to modular homes where the pieces/modules are built in a factory and then are assembled on-site. Mobile homes are any manufactured home built prior to June 15, 1976.*

4. Are the manufactured homes you develop rental or for-sale?
  - a. Rental
  - b. For-Sale
  - c. Both Rental and For-Sale
  - d. Unknown
5. Does your organization act as the General Contractor on development (new construction and significant rehab)?
  - a. Yes, for our own developments
  - b. Yes, we offer a GC service to others
  - c. Yes, for both our own developments and as a GC service to others
  - d. We are exploring this
  - e. No
  - f. Unknown

*A general contractor, main contractor or prime contractor is responsible for the day-to-day oversight of a construction site, bidding out sub-contracts, management of vendors and trades, and the communication of information to all involved parties throughout the course of a building project.*

6. For what portion of your current pipeline is your organization the GC?
  - a. All

- b. Some
  - c. None – but we do have properties under construction
  - d. N/A – we don't currently have any properties under construction
  - e. Unknown
7. How much predevelopment spending to do you have planned for the 2020 calendar year?
- a. \$0 (but my company does real estate development)
  - b. \$1-\$500,000
  - c. \$500,001-\$1M
  - d. \$1,000,001-\$1.5M
  - e. \$1,500,001-\$2M
  - f. Over \$2 million
  - g. Not Applicable - my company doesn't do / no longer does real estate development

## Green/Healthy Building Certifications

1. Do you currently own or manage a property built with [USGBC LEED](#) standards?
  - a. Yes
  - b. No
  - c. Exploring
  - d. Unknown
2. Do you currently own or manage a property built with [International WELL](#) standards?
  - a. Yes
  - b. No
  - c. Exploring
  - d. Unknown
3. Do you currently own or manage a property built with [Fitwel](#) standards?
  - a. Yes
  - b. No
  - c. Exploring
  - d. Unknown
4. Do you currently own or manage a property built with [Living Building Challenge](#) standards?
  - a. Yes
  - b. No
  - c. Exploring
  - d. Unknown
5. Do you currently own or manage a property built with [BREEAM](#) standards?
  - a. Yes
  - b. No
  - c. Exploring
  - d. Unknown
6. Do you currently own or manage a property built with [Passive House](#) standards?
  - a. Yes
  - b. No
  - c. Exploring
  - d. Unknown

## Non-Traditional Homeownership Models

*Does your organization utilize any of the below non-traditional homeownership models?*

1. Shared Equity
  - a. Yes
  - b. No

- c. Exploring
- d. Unknown

*This could include Community Land Trust or other options whereby a borrowers' initial equity is reduced by sharing it with another entity, with an agreement for sharing appreciation in the event of sale or refinancing.*

2. Lease to Own

- a. Yes
- b. No
- c. Exploring
- d. Unknown

*Option whereby a renter can utilize rental payments or rental history to transition from renting to owning a home. May also be called Rent to Own.*

3. Other Nontraditional Homeownership Model

- a. Yes
- b. No
- c. Exploring
- d. Unknown

*Does your organization utilize any other nontraditional homeownership models?*

4. Other Nontraditional Homeownership Model Details [insert text]

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## 2020 HPN Member Profile

### Page 7 - Property Management and Resident Services

#### Property Management

1. Does your organization provide property management for your own buildings and/or on a third-party basis for other organizations?
  - a. Active Business Line
  - b. Inactive Business Line
  - c. Never Had This Business Line
2. Total Number of Housing Units Your Organization Managed on 12/31/19 (both multi- and single-family):

*Include the total number of multifamily and single-family housing units that your organization managed as of the end of the last calendar year (including subsidiaries and affiliates). Include housing units that you owned, along with housing units for which you provided third-party management.*
3. Total Square Feet of Commercial Space Under Management on 12/31/19:

*The total square feet of commercial space that your organization managed as of the end of the last calendar year (including subsidiaries and affiliates). Include commercial space that you owned, along with commercial space for which you provided third-party management.*
4. Does your organization manage any single-family housing (1-4 unit buildings)?
  - a. Yes
  - b. No
5. How many units of single-family housing did your organization manage on 12/31/19?

*Include the total number of SINGLE-FAMILY housing units—defined as housing within 1-4 units per building—that your organization managed as of the end of the last calendar year (including subsidiaries and affiliates). Include housing units that you owned, along with housing units for which you provided third-party management.*

#### Resident Services

1. Are resident services offered to those living in housing that your organization has developed/owns?
  - a. Active Business Line - my organization provides the resident services
  - b. Active Business Line - a third party (unaffiliated) organization provides the resident services
  - c. Inactive Business Line
  - d. Never Had This Business Line

*Both actives can be selected at the same time.*
2. Number of residents served in [2019] through after-school/school aged programs

*The number of unique residents served in the last calendar year through after-school/school aged programs. An estimate is okay.*
3. Number of residents served in [2019] through adult job training programs

*The number of unique residents served in the last calendar year through adult job training programs. An estimate is okay.*

4. Does your organization partner with any of the following (select all that apply)?
  - a. Hospitals (NEW)
  - b. Assisted Living Facilities
  - c. Skilled Nursing Facilities
  - d. Federally Qualified Health Centers
  - e. Programs for All-Inclusive Care for the Elderly (PACE) Centers
  - f. Health Insurance Companies
  - g. None of the Above
5. Please describe your partnerships with the above health entities/organizations (2000 character limit): [insert text]

## **Resident Outcomes**

*Please answer the following resident outcomes questions, if known or applicable. Only answer these questions if your organization currently owns or manages rental housing.*

*If your organization does not currently track this information, please enter "Not Collected"; if it is collected but difficult to aggregate and/or report on please enter "Not Reportable."*

6. Percent of households who reported increased gross income in 2019:
7. Percent of households who reported increased assets in 2019:
8. Percent of households who moved because they bought a home in 2019:
9. Percent of households who moved due to eviction in 2019:
10. Percent of residents enrolled in health insurance in 2019 (e.g., private insurance, Medicaid, Medicare, health insurance exchanges, etc.):



## 2020 HPN Member Profile

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### Page 8 - Debt and Equity Investing

#### Debt & Equity Investing

1. Does your organization engage in commercial/development lending, consumer mortgage lending (this includes down payment/closing cost loans), and/or equity syndication and/or have you done this in the past?
  - a. Yes, we currently engage in lending or equity syndication or have in the past
  - b. No

*Please select "yes" if this is a current or inactive (past) business line.*

2. Does your organization provide down payment and/or closing cost assistance GRANTS or administers down payment/closing cost assistance loans that you didn't originate (i.e. you were not the lender)?
  - a. Yes
  - b. No
  - c. Not Sure

*Select "Yes" if your organization provides grants or loan program administration for down payment and/or closing cost assistance where your organization is NOT the lender (or it is a grant, not a loan).*

*Note: Please do not include such grants or loan administration in the Consumer Mortgage Lending section below on this page.*

3. How many housing units were funded in 2019 through down payment and/or closing cost assistance grants or loans where your organization administered the loans but was not the lender (i.e. did not originate the loan)?
4. How many housing units were funded, inception through 12/31/19, through down payment and/or closing cost assistance grants or loans where your organization administered the loans but was not the lender (i.e. did not originate the loan)?
5. Total Assets Under Management on 12/31/19 (in US dollars):

*The total monetary value (in US dollars) of assets under management, as of the end of the last calendar year, e.g., \$100,000,000. "Assets under management" can include, but is not limited to, the following categories: current outstanding portfolio (commercial lending and consumer mortgages); commitments (assets you can draw upon for lending or investing); servicing portfolio; and/or equity funds (NMTC and LIHTC).*

6. Is your organization a Community Development Entity (CDE) capable of receiving New Markets Tax Credit (NMTC) allocations?
  - a. Yes
  - b. No
7. New Markets Tax Credit (NMTC) Allocation from the CDFI Fund in the last funding round--CY 2019 (in US Dollars):

*Please respond only for those NMTC dollars that you received directly from the CDFI Fund as a CDE, not for NMTC dollars you received from a lender/CDE for development.*

8. New Markets Tax Credit (NMTC) Allocation from the CDFI Fund, Inception through the last funding round--CY 2019 (in US Dollars):

*Please respond only for those NMTC dollars that you received directly from the CDFI Fund as a CDE, not for NMTC dollars you received from a lender/CDE for development.*

## **Commercial and/or Development Lending**

*Please include all subsidiaries and affiliates when answering these questions.*

1. Does your organization offer commercial and/or development lending?
  - a. Active Business Line
  - b. Inactive Business Line
  - c. Never Had This Business Line
2. Funders, investors, and policy makers often request information on our members' activity in specific geographic regions. Currently, we do not have information that would enable us to quantify the volume of work our lender members are doing in particular regions. We are asking for your help to demonstrate the full power of our network by submitting geographic-based loan data. In order to minimize the reporting burden, members can repurpose a current loan portfolio report and upload it here. The file should include on-balance sheet loans outstanding at the end of the last calendar year (12/31/2019), tracking the dollar volume of loans at the smallest geographic level you have readily available (address, zip, city, county, or state). Please reach out with any questions. [UPLOAD]
3. Value of Loans Closed in 2019 (In US dollars):

*The monetary value (in US dollars) of all on- and off-balance sheet loans closed during the last calendar year, e.g., \$3,000,000. A loan is counted as "closed" when a legally binding note has been signed by the borrower in favor of the lender.*
4. Number of Loans Closed in 2019:

*The total number of on- and off-balance sheet loans closed during the last calendar year, e.g., 150. A loan is counted as "closed" when a legally binding note has been signed by the borrower in favor of the lender.*
5. Value of Loans Outstanding 12/31/19 (in US dollars):

*The monetary value (in US dollars) of all on- and off-balance sheet loans outstanding at the end of the last calendar year, e.g., \$5,000,000.*
6. Value of Loans Closed, Inception through 12/31/19 (in US dollars):

*The monetary value (in US dollars) of all on- and off-balance sheet loans closed since your organization began lending through the end of the last calendar year, e.g., \$300,000,000. A loan is counted as "closed" when a legally binding note has been signed by the borrower in favor of the lender. If you do not have access to data since inception, count from as far back as you are able.*
7. Total Amount Leveraged, Inception through 12/31/19 (in US dollars):

*The total monetary value (in US dollars) of projects that your organization has lent to, including the amount you lent, from inception through the end of the last calendar year, e.g., \$1,000,000,000. If you do not have access to data since inception, count from as far back as you are able.*

*Please answer the following production questions on enterprises that your organization has financed, if known or applicable.*

8. Housing Units Financed, Inception through 12/31/19:

*Number of multi-family and single-family housing units projected to be constructed or preserved as a result of debt investments made from inception through the end of the last calendar year.*
9. Were any of the housing units financed through commercial/development lending also developed/ rehabbed by your company? E.g., your company developed the units and also financed the units through an affiliate/related company loan.
  - a. Yes
  - b. No



- c. Unknown / Not Tracked
- d. Not Applicable

*This is to prevent double-counting in instances where HPN combines the units developed and units financed by its members.*

10. How many of the housing units financed through commercial/development lending were also developed/rehabbed by your company (e.g., your company developed the units and also financed the units through a related company loan)?

*This is to prevent double-counting in instances where HPN combines the units developed and units financed by its members.*

11. Charter School Seats Financed, Inception through 12/31/19:

*Number of new school seats created or preserved at charter schools financed by your organization from inception through the end of the last calendar year.*

12. Day Care Slots Financed, Inception through 12/31/19:

*Number of new day care slots created or preserved at early childhood centers financed by your organization from inception through the end of the last calendar year.*

13. Individuals Served Annually at Financed Community Health Centers:

*Number of unique individuals served annually at community health facilities financed by your organization. Included community health centers financed from inception through the end of the last calendar year.*

14. Square Feet of Community and Commercial Facilities Financed, Inception through 12/31/19:

*Total square feet of community and commercial facilities projected to be built, renovated, or purchased as a result of debt investments made from inception through the end of the last calendar year.*

15. Square Feet of Grocery Space Financed, Inception through 12/31/19:

*Total square feet of supermarkets, grocery stores, and fresh food retailers projected to be built, renovated, or purchased as a result of debt investments made from inception through the end of the last calendar year.*

16. Number of Jobs Created, Inception through 12/31/19:

*Net number of new, full-time equivalent jobs created by financed enterprises from inception through the end of the last calendar year. [Click here](#) to read about best practices in jobs data collection from the Create Jobs for USA initiative by Starbucks and OFN.*

## Consumer Mortgage Lending

*Please include all subsidiaries and affiliates when answering these questions. Do not include grants made to consumers or loan program administration where your organization is not the lender.*

1. Does your organization offer consumer mortgage lending?
  - a. Active Business Line
  - b. Inactive Business Line
  - c. Never Had This Business Line

*Please do not include grants or loan program administration (i.e. where your organization was NOT the lender) in this section.*

2. Is your organization a Fannie Mae SELLER?
  - a. Yes
  - b. No
  - c. Exploring
  - d. Unknown
3. Is your organization a Fannie Mae SERVICER?
  - a. Yes
  - b. No
  - c. Exploring

- d. Unknown
4. Is your organization a Freddie Mac SELLER?
- a. Yes
  - b. No
  - c. Exploring
  - d. Unknown
5. Is your organization a Freddie Mac SERVICER?
- a. Yes
  - b. No
  - c. Exploring
  - d. Unknown
6. Value of Loans Closed in 2019 (in US dollars):
- The monetary value (in US dollars) of consumer mortgage loans closed by your organization during the last calendar year, including subsidiaries and affiliates (e.g., \$1,000,000). Include on- and off-balance sheet loans. Do not include grants made to consumers or loan program administration where your organization is not the lender. A loan is counted as "closed" when a legally binding note has been signed by the borrower in favor of the lender.*
7. Number of Loans Closed in 2019:
- Report on the total number of consumer mortgage loans closed by your organization during the last calendar year, including subsidiaries and affiliates (e.g., 100 loans). Include on- and off-balance sheet loans. Do not include grants made to consumers or loan program administration where your organization is not the lender. A loan is counted as "closed" when a legally binding note has been signed by the borrower in favor of the lender.*
8. Housing Units Financed in 2019:
- Number of housing units purchased or projected to be constructed as a result of consumer mortgage loans closed in the last calendar year.*
9. Were any of the housing units financed through consumer mortgage lending in 2019 also developed/rehabbed by your company? E.g., your company financed the mortgage and also developed/rehabbed the home (possibly through an affiliate or related company).
- a. Yes
  - b. No
  - c. Unknown / Not Tracked
  - d. Not Applicable
- This is to prevent double-counting in instances where HPN combines the units developed and units financed by its members.*
10. How many of the housing units financed through consumer mortgage lending in 2019 were also developed/rehabbed by your company? E.g., your company financed the mortgage and also developed/rehabbed the home (possibly through an affiliate or related company).
- This is to prevent double-counting in instances where HPN combines the units developed and units financed by its members.*
11. Value of Loans Closed, Inception through 12/31/19 (in US dollars):
- Report on the monetary value (in US dollars) of consumer mortgage loans closed by your organization from inception through the end of the last calendar year, including subsidiaries and affiliates (e.g., \$5,000,000). Include on- and off-balance sheet loans. Do not include grants made to consumers or loan program administration where your organization is not the lender. A loan is counted as "closed" when a legally binding note has been signed by the borrower in favor of the lender. If you do not have access to data since inception, count from as far back as you are able.*
12. Number of Loans Closed, Inception through 12/31/19:
- Report on the total number of consumer mortgage loans closed by your organization from inception through the end of the last calendar year, including subsidiaries and affiliates (e.g., 1000 loans). Include on- and off-balance sheet loans. Do not include grants made to consumers or loan program administration where your organization is not the lender. A loan is counted as "closed" when a legally*

*binding note has been signed by the borrower in favor of the lender. If you do not have access to data since inception, count from as far back as you are able.*

13. Housing Units Financed, Inception through 12/31/19:

*Number of housing units purchased or projected to be constructed as a result of consumer mortgage loans closed from inception through the end of the last calendar year.*

14. Were any of the housing units financed to-date (since inception through 12/31/19) through consumer mortgage lending also developed/ rehabbed by your company? E.g., your company financed the mortgage and also developed/ rehabbed the home (possibly through an affiliate or related company).
- Yes
  - No
  - Unknown / Not Tracked
  - Not Applicable

*This is to prevent double-counting in instances where HPN combines the units developed and units financed by its members.*

15. How many of the housing units financed to-date (since inception through 12/31/19) through consumer mortgage lending were also developed/ rehabbed by your company? E.g., your company financed the mortgage and also developed/ rehabbed the home (possibly through an affiliate or related company).

*This is to prevent double-counting in instances where HPN combines the units developed and units financed by its members.*

### **First Mortgage Lending**

16. Value of First Mortgage Loans Closed in 2019 (in US dollars):

*The monetary value (in US dollars) of all consumer FIRST MORTGAGE loans closed by your organization during the last calendar year, including subsidiaries and affiliates (e.g., \$1,000,000). Include on- and off-balance sheet loans. Do not include grants made to consumers or loan program administration where your organization is not the lender. A loan is counted as "closed" when a legally binding note has been signed by the borrower in favor of the lender.*

17. Value of First Mortgage Loans Outstanding at 12/31/19 (in US dollars):

*The monetary value (in US dollars) of all on- and off-balance sheet FIRST MORTGAGE loans outstanding at the end of the last calendar year, e.g., \$5,000,000*

### **Race/Ethnicity in Mortgage Lending**

*HPN has been in conversations with funders seeking to end the racial homeownership gap. It would be valuable for us to have available the race/ethnicity information of our members' mortgage activity in order to demonstrate our work in this area and how this compares to national averages. Please provide the following if you have it available. Estimates are fine, as we will primarily be looking at this information on an aggregated basis (all members, geographic regions, etc.).*

*Please answer the following questions for all consumer mortgage loan types closed in the last calendar year including: down payment/closing cost assistance loans (including second mortgages), first mortgages, home repair/retrofit loans, and reverse mortgages.*

*Note: Each section on the right (Borrower Ethnicity and Borrower Race) is set up to equal 100%. When there is no data, the "unknowns" will be 100%, and unknowns will decrease as you add in "known" information.*

#### **Borrower Ethnicity**

1. Percentage of Hispanic or Latino/a borrowers for consumer mortgage loans closed in 2019:

*Percentage of Hispanic/Latino borrowers out of all borrowers of consumer mortgage loans closed in the last calendar year*

2. Percentage of borrowers that are NOT Hispanic or Latino/a for consumer mortgage loans closed in 2019:

*Percentage of borrowers that are not Hispanic/Latino out of all borrowers of consumer mortgage loans closed in the last calendar year*

3. [Auto-calculated] Percentage of borrowers whose Hispanic or Latino/a identification is unknown for consumer mortgage loans closed in 2019:

*This field is auto-calculated and defaults to 100% if no data is entered.*

### **Borrower Race**

4. Percentage of American Indian or Alaska Native borrowers for consumer mortgage loans closed in 2019:

*Percentage of American Indian or Alaska Native borrowers out of all borrowers of consumer mortgage loans closed in the last calendar year*

5. Percentage of Asian borrowers for consumer mortgage loans closed in 2019:

*Percentage of Asian borrowers out of all borrowers of consumer mortgage loans closed in the last calendar year. Includes borrowers identifying as Asian Indian, Chinese, Filipino, Japanese, Korean, Vietnamese, etc.*

6. Percentage of Black or African American borrowers for consumer mortgage loans closed in 2019:

*Percentage of Black or African American borrowers out of all borrowers of consumer mortgage loans closed in the last calendar year*

7. Percentage of Native Hawaiian or Other Pacific Islander borrowers for consumer mortgage loans closed in 2019:

*Percentage of Native Hawaiian or Other Pacific Islander borrowers out of all borrowers of consumer mortgage loans closed in the last calendar year. Includes borrowers identifying as Native Hawaiian, Guamanian or Chamorro, Samoan, etc.*

8. Percentage of White borrowers for consumer mortgage loans closed in 2019:

*Percentage of White borrowers out of all borrowers of consumer mortgage loans closed in the last calendar year*

9. Percentage of borrowers who identify as having two or more races for consumer mortgage loans closed in 2019:

*Percentage of multi-racial borrowers out of all borrowers of consumer mortgage loans closed in the last calendar year*

10. [Auto-calculated] Percentage of borrowers whose race is unknown for consumer mortgage loans closed in 2019:

*This field is auto-calculated and defaults to 100% if no data is entered.*

### **Equity Syndication**

*Please include all subsidiaries and affiliates when answering these questions.*

1. Is your organization an equity syndicator (e.g., for LIHTC, State Tax Credits, Historic Tax Credits)?
  - a. Active Business Line
  - b. Inactive Business Line
  - c. Never Had This Business Line
2. Total Amount Invested in 2019 (in US dollars):

*The total monetary value (in US dollars) of equity investments made during the last calendar year.*

3. Total Units Created or Preserved in 2019:

*The number of single-family and multi-family housing units constructed or preserved as a result of equity investments made during the last calendar year.*

4. Were any of the units created/preserved in 2019 through equity investments also reported in "housing units financed in 2019" in the lending sections above?

- a. Yes
- b. No
- c. Unknown / Not Tracked
- d. Not Applicable (do not do lending)

*This is to prevent double-counting of units that received both debt and equity financing in the aggregate member numbers that HPN produces (i.e. total units financed in 2017 through debt and equity for all HPN members).*

5. How many units were double-counted in the reported housing units financed in 2019?

*This is to prevent double-counting of units that received both debt and equity financing in the aggregate member numbers that HPN produces (i.e. total units financed in 2017 through debt and equity for all HPN members).*

6. Total Amount Invested, Inception through 12/31/19 (in US dollars):

*The total monetary value (in US dollars) of equity investments made by your organization from inception through the end of the last calendar year.*

7. Total Amount Leveraged, Inception through 12/31/19 (in US dollars):

*The total monetary value (in US dollars) of projects in which your organization has invested, including the amount you invested, from inception through the end of the last calendar year, e.g., \$1,000,000,000.*

8. Total Units Created or Preserved, Inception through 12/31/19:

*The number of single-family and multi-family family housing units constructed or preserved as a result of equity investments made from inception through the end of the last calendar year.*

9. Were any of the units created/preserved through equity investments (inception through 12/31/19) also reported in "housing units financed, inception through 12/31/19" in the lending sections above?

- a. Yes
- b. No
- c. Unknown / Not Tracked
- d. Not Applicable (do not do lending)

*This is to prevent double-counting of units that received both debt and equity financing in the aggregate member numbers that HPN produces (i.e. total units financed through debt and equity to date for all HPN members).*

10. How many units were double-counted in the reported housing units financed since inception?

*This is to prevent double-counting of units that received both debt and equity financing in the aggregate member numbers that HPN produces (i.e. total units financed through debt and equity to date for all HPN members).*



## 2020 HPN Member Profile

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### Page 9 - Date Updated

#### Date Member Profile Last Updated

1. Date Updated

*This is the date you have completed and are submitting your member profile.*