



## INTRODUCTION TO THE MICROSOFT® EXCEL-BASED TOOL FOR EVICTION PREVENTION TRACKING

When property managers send notices to tenants regarding potential evictions and policy violations, it is important that resident services coordinators—those who work most closely with residents—are aware of these letters and the infractions that prompted them. Resident services coordinators play a vital role in helping residents find the assistance they need, financial or otherwise, to ensure they can be tenants in good standing.

However, it can be difficult to develop a communication and tracking system that ensures both property managers and resident services coordinators are aware of potential problems, the actions taken to remedy these problems and the outcomes of any interventions. As mentioned in the “Recommendations and Tips for Eviction Prevention” document in this section, communication is very important, and before any tracking system for eviction or policy violation notices can be established, clear lines of communication between property management and resident services staff must be established. Once the communication pathways are opened, both groups can work collectively to track notices, interventions and outcomes to bring about the most positive results for staff and tenants.

Enterprise has created a tool, available for downloading and customizing in the online version of this manual, that property managers and resident services coordinators can use to coordinate eviction intervention efforts. The Microsoft Excel-based tool is designed for access by multiple users, but it can be converted into a single-user application that would require more off-line communication. You can find the tool online at [www.enterprisecommunity.org/resources](http://www.enterprisecommunity.org/resources).

Included in the tool are drop-down menus that enable multiple users to enter data that are uniform, allowing for easier comparison and analysis; these drop-down menus can be changed to suit the needs of any organization by selecting the “Validation” feature under Excel’s “Data” menu (when attempting to do this, highlight all of the column’s empty cells to ensure the drop-down menu appears regardless of how many times you enter new data). In addition to the drop-down menus, there are columns designed to capture more details about a particular case, and these columns allow users to enter any pertinent information. To further aid in the analysis of notice type and intervention efficacy, the Excel workbook includes a “Roll Up” sheet where information tables and graphs can be created for inclusion in internal or external program reports.

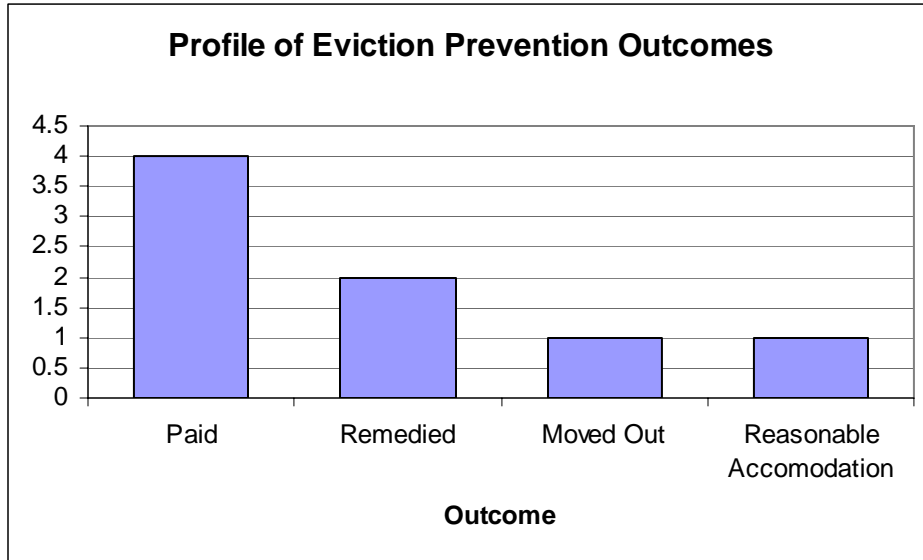
The following is the list of column headings included in the tool:

- Date
- Unit #
- Building
- \*Notice Type—can be customized to match the types of notices sent in a particular community
- \*Issue—provides a more specific description of why the notice was sent
- If Other, please specify
- RSC (Resident Services Coordinator) Action\*—what intervention steps were taken
- \*Referral 1—what was the subject of the first referral
- \*Referral 2—what was the subject of the second referral (if needed)
- \*Referral 3—what was the subject of the third referral (if needed)
- RSC Notes —an open column for relevant referral and intervention details
- \*Outcome—how was the situation resolved
- Outcome Date
- Follow-up Notes—an open column for relevant details about the resolution

\*These columns include drop-down menus that restrict what information can be entered. You can customize these restrictions to fit your program.

More important than the tool's ability to analyze programs, however, is its ability to actually track in real time the progress of referrals and other assistance measures. Following the initial notice being sent, a row is created in the spreadsheet that allows both property managers and resident services staff to see what is being done to resolve the problem and whether a final resolution has been achieved or if there are still outstanding issues.

The following chart is an example of the type of program analysis that can be conducted using the eviction prevention tool.



To be sure, some organizations will find that this template does not fit their programs. In such cases, the easy-to-use format of Excel makes it possible to customize the spreadsheet to your needs. If any errors occur, you can return to the “clean slate” of the online original.

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