

Northwest Community Land Trust Coalition



Strategic Plan 2009-2014

Adopted by the Board of Directors

April 9, 2009

Mission Statement

The Northwest Community Land Trust Coalition (NWCLTC) supports and enhances the activities of the community land trusts (CLTs) based in the Pacific Northwest so that they can provide permanently affordable access to land for housing and other community needs that serve low- and moderate-income members of their communities.

Vision

NWCLTC members share the **vision** of the Pacific Northwest as home to a strong Coalition serving a growing number of dynamic, effective, and sustainable community land trust organizations. Over the next several years, the NWCLTC's growing impact will be enhanced by a small but effective staff facilitating the work of CLTs across the Northwest. The Coalition's work and successful accomplishments will lead to:

- An increased number of communities within the region that are served by CLTs
- An increased amount of dedicated and accessible funds to support CLT projects;
- Increased production/preservation of affordable housing by CLTs;
- Significant gains in support for the community land trust movement;
- Clear policy preference for permanently affordable homeownership; and
- Strong partnerships with others across interest and issue areas.

Across the Northwest region, CLTs will be widely recognized and highly valued for their professional skills and innovative strategies for building healthy communities. CLTs work to ensure permanently affordable access to land as the foundation for their efforts to create:

- Affordably priced homes for sale to low and moderate income households so that people can live in the communities where they work and build equity to invest in their future;
- Innovative and appropriate economic development activities; and
- Effective community stewardship of the land.

Values

The Coalition's core **values** include:

- Collaboration and sharing of ideas, best practices and documents within and among the Coalition membership;
- Supporting all CLTs to achieve excellence in management, program delivery and community connections;
- Accomplishing our organizational goals in a fiscally responsible manner;
- Emphasizing the use of affordable housing resources to ensure permanent affordability;
- Encouraging a thoughtful and respectful regard for land as a community asset by ensuring its careful use; and
- Promoting sustainable approaches and relationships that steward the community's economic, social and natural capital.

<p>Goal #1 Provide excellent member services that will increase the capacity of existing CLTs and foster growth, thoughtfully and strategically, of new CLTs so that there is a significant increase in the number of permanently affordable homeownership opportunities across the region.</p>	<p>Desired Outcomes:</p> <ol style="list-style-type: none"> 1. All CLTs are more productive, effective and sustainable. Each mature CLT receives at least 33% of income from sustainable fee for service sources. 2. More CLT activity in more places not necessarily more CLTs. At least 60% of Washington and Oregon combined geography is covered by a CLT. 3. Each CLT will increase production by at least 10%. Collective regional CLT production totals over 1000 units. 4. More land effectively stewarded by community-based groups.
<p>Context: There needs to be a balance between serving existing, established CLTs and serving “startup” CLTs. In the last 5 years it was recognized that the gatherings, and most recently the Capacity Building Institute (CBI), have provided substantial learning opportunities for staff and board of new CLTs. Relatively little has been provided to assist established CLTs. In fact it is the staff and board of established CLTs who have been tapped time and time again to provide assistance to start-ups. In an environment of severe funding contraction the NWCLTC will prioritize services to existing CLTs. This will help them improve their systems, become financially sustainable, and grow to scale. We need to insist that the inception of new CLTs be in certain targeted service areas.</p>	
<p>Timeline:</p> <ol style="list-style-type: none"> 1.1 <ol style="list-style-type: none"> a. Will evolve to implement starting 09/09 b. Start in 2011 c. 08/09 d. As part of website by 07/09 e. 08/09 f. Following National CLT Network lead g. Year end 2009 h. Start in 2010 	<p>Strategies:</p> <ol style="list-style-type: none"> 1.1 Provide excellent services to all of our CLT members. <ol style="list-style-type: none"> a. Organize and host an annual conference that will serve members’ needs as well as educate partners – funders, lenders, appraisers, policy makers, etc. b. Develop strategy for back office services (organizational infrastructural tasks – bookkeeping, data retention, etc.) that the coalition might provide for members. c. Utilize an electronic format to communicate to members on a regular basis. d. Catalog and create easy access to best practices, documents, contracts, etc. for members to use. e. Improve the on-line forum (currently the list-serve) to facilitate the sharing of technical and organizational knowledge. f. Investigate the costs and benefits of creating a Technical Assistance Circuit Rider position on-staff to assist members with technical needs. g. Create, in collaboration with the National CLT Network, a joint dues structure that will allow greater value for members of both the National and the Regional body. h. Investigate providing access to group insurance

<p>Goal #2 Increase general public awareness of the CLT strategy in order to create increased support of our efforts.</p>	<p>Desired Outcomes: “Community Land Trusts” become a household name and gain recognition throughout popular culture. Create a unified message and brand regarding the work of CLTs that is in sync with a national effort and is able to serve member CLTs in their communities.</p>
<p>Context: Even CLT practitioners can often be confused when talking to each other about their work. CLTs use terms like sales price, subsidy, loan-to-value differently from organization to organization. More importantly is creating a unified message about <i>what</i> CLTs are and <i>how</i> we go about doing <i>what</i> we do that is clear to decision makers, easy to understand for the general public and attractive to both funders and potential homebuyers.</p>	

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Timeline:	Strategies:
<p>2.1 a. Draft complete 08/09 b. Identify key locations 2010 c. Materials to be developed in accordance with communication plan</p>	<p>2.1 Create CLT “messages that work” a. Create a strategic communications plan b. Implement a marketing campaign in strategic geographic locations c. Create a consistent message region wide. Develop materials sponsored by the coalition but that can be modified and distributed by members locally d. We need to position – through messaging – CLTs to be a “solution: in the current climate and beyond.</p>
<p>2.2 a. Schematic complete by 06/09. Launched and functional by 08/09. b. Underway by 06/09. Completed by 09/09. To debut at fall gathering.</p>	<p>2.2 Utilize “messages that work” in a variety of different media. a. Create a website and direct people to it. b. Create DVD and utilize video clips in a number of environments. c. Target specific audiences (social marketing approach)</p>
<p>2.3 a. Include half day “workshops” for partners at Portland (Fall '09) gathering. Assess. b. When the Coalition’s membership is requested by these orgs. We’ll send alerts to membership.</p>	<p>2.3 Build on existing relationships – better inform and educate people/organizations who already support the CLT approach. a. Consider hosting an event (symposium?) with practitioners, funders, policy makers to learn about CLTs and strategize b. Compel our members to become members of other national, state and/or regional housing organizations (e.g. National CLT Network Washington Low Income Housing Alliance and Oregon Housing Association).</p>
<p>2.4 a. – c. Will conduct in accordance with the Strategic Communications Plan.</p>	<p>2.4 Build relationships with news media. a. Get more exposure through the media in relation to timely news items (foreclosure crisis, CRA criticisms, etc.) b. Partner with community media c. Create relationships with local and regional media outlets</p>

<p>Goal #3 Be deemed a respected and helpful leader in the permanently affordable homeownership industry</p>	<p>Desired Outcomes: The automatic recommendation for any group or individual in the northwest who is interested in CLTs will be to contact the Coalition in order to get the best information available, to get appropriate referrals to information and technical assistance, to not waste valuable time and resources, as well as to ensure the good reputation of CLTs and permanently affordable housing across the region.</p>
<p>Context The Coalition is a collection of CLT practitioners, many of who are experts in the field. It benefits us all if community members who are interested in CLTs get the best information available. The Coalition will continue to position us to be the go-to organization for questions regarding CLTs in the Northwest.</p>	
<p>Timeline:</p> <p>3.1</p> <p>a. 2009</p> <p>b. 2010</p> <p>c. 2010</p> <p>d. 2009 (on website)</p> <p>3.2</p> <p>a. on-going</p> <p>b. 2009</p> <p>c. 2010</p> <p>3.3</p> <p>a. 12/08 – National Conference</p> <p>b. On Issues that have strategic meaning for the Coalition as time allows.</p>	<p>Strategies:</p> <p>3.1 Provide useful service to individuals/groups considering starting a CLT in their community.</p> <p>a. Create a list of objective criteria that defines “target CLT service areas”</p> <p>b. Develop checklist to help communities decide if a CLT would work in their communities.</p> <p>c. Create a list of first step assignments for interested individuals/groups to complete.</p> <p>d. Conduct education to members about “services” the coalition can offer to CLTs and groups interested in starting a CLT. If members are contacted by these groups for support they would refer them to the coalition</p> <p>3.2 Provide useful services to funders and decision makers who interact with CLTs</p> <p>a. Encourage funders to see the Coalition as a representative of regional CLTs and to communicate with CLTs through the Coalition.</p> <p>b. Spell out membership criteria and advise funders regarding the meaning of membership.</p> <p>c. Alert funders and policy makers to the resources that the Coalition can provide to them.</p> <p>3.3 Continue to work with the National CLT Network to fulfill it’s mission to support CLTs as appropriate</p> <p>a. Share the NW Coalition experience with others across the country.</p> <p>b. Be responsive to the National CLT Network requests for assistance.</p>

<p>Goal #4 Play an effective and central role in shaping public policy to ensure efficient use of scarce public resources.</p>	<p>Desired Outcomes: A policy and funding bias towards permanently affordable homeownership. Favorable policies and increased resources to benefit the work of CLTs across the region. More communities using incentives and requirements to make affordable housing a requirement of development. More permanently affordable homeownership opportunities available throughout the region.</p>
<p>Context: To date the NWCLTC has done very little public policy advocacy. It is clear that there is a need, as articulated by our members and some of our partners to play a role in shaping policy that affects CLTs. We also recognize that CLTs will be able to “get to scale” only when jurisdictions institute Inclusionary zoning requirements and other regulations that make creating affordable housing less expensive and/or less onerous. There is the general sense that while the NWCLTC served its Washington members quite well, it has done relatively little to assist its Oregon members.</p>	
<p>Timeline:</p> <p>4.1</p> <p>a. On-going annually</p> <p>b. 2011</p> <p>c. Do so periodically in electronic communication format (starting 06/09)</p> <p>4.2</p> <p>a. 2010</p> <p>b. Start in 2009 and continue</p> <p>4.3</p> <p>a. On-going annually</p> <p>b. Strategic effort to start in 2010 in accordance with communications plan</p> <p>4.4</p>	<p>Strategies:</p> <p>4.1 The NWCLTC will become a much more visible and vocal participant in both Washington and Oregon’s affordable housing advocacy community.</p> <p>a. Participate in WLIHA and OHA meetings and legislative agenda setting meetings</p> <p>b. Gain a board seat on WLIHA</p> <p>c. Remind members to actively represent the Coalition at meetings</p> <p>4.2 The NWCLTC will systematically create and strengthen relationships with administrative decision makers and affordable housing funders (WSHFC, OHCS, Oregon ON, WLIHA, etc.)</p> <p>a. Garner WSHFC’s full support of permanently affordable homeownership (subsidy retention)</p> <p>b. In Oregon have CLT delegation educate and inform Oregon ON, OHA, Housing Alliance, OHCS and major foundations regarding the benefits of permanently affordable homeownership</p> <p>4.3 The NWCLTC will systematically create and strengthen relationships with elected officials both at the state and national level.</p> <p>a. Participate and play a lead role when appropriate in both Washington and Oregon’s Housing Advocacy/Lobby days.</p> <p>b. Create relationships with elected officials and their staff.</p> <p>4.4 the NWCLTC will act as a conduit of information flow to and from our CLT members to the National CLT Network in order to effectively advocate for policies that serve the</p>

<ul style="list-style-type: none"> a. On-going since 02/09 b. Since 02/09 c. Do so periodically in electronic communication format (starting 06/09) 	<p>needs of CLTs on both the state and national level.</p> <ul style="list-style-type: none"> a. Meet monthly with National and other regional coalition representatives b. Participate in the national “Mortgage Finance Task Force” c. Keep membership up to date with National goings on.
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<p>Goal #5 Work to ensure that CLTs in the region have the resources available to fulfill their missions and serve their communities</p>	<p>Desired Outcomes: A sustainable funding source and/or increased earned income for Coalition operations, the creation of a Revolving Loan Fund for member CLTs to utilize as land acquisition and/or construction financing, increased access and mortgage options for CLT homebuyers and lastly, identified resources to ensure that CLT homes are maintained and improved. Generally increased Resources for Coalition, member CLTs, homebuyers and homeowners.</p>
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Context: There is the obvious need to identify and pursue sources of funding that will be sustainable to support the operations of the coalition. We will work towards increasing earned income as a percentage of overall income. CLTs in the northwest have been talking for years about creating a revolving loan fund that could work in a variety of capacities to serve our overall goal of creating permanently affordable homeownership opportunities. Resources are needed for operational support, land acquisition and constructions financing, homebuyer mortgages as well as for CLT homeowners to access to maintain and improve their homes.

<p>Timeline:</p> <p>5.1</p> <ul style="list-style-type: none"> a. Working through the National Network and the Shared Equity Housing Coalition b. 2010 <p>5.2 Spring 2010</p> <p>5.3</p> <ul style="list-style-type: none"> a. Strategic effort to start in 2010 in accordance with communications plan b. In conjunction with the Shared Equity Housing Coalition/National CLT 	<p>Strategies:</p> <p>5.1. Ensure that member CLTs have access to the funding they need</p> <ul style="list-style-type: none"> a. Access to decision makers at HUD to make sure HUD (HOME and CDBG) funding works for CLTs b. Develop an effective Community Investment Fund (a way for community members to invest in the work of their local CLT) model to use throughout the region by individual CLTs <p>5.2. Create a working group of CLT members to conduct research and provide recommendations regarding creating a Revolving Loan Fund for CLTs</p> <p>5.3. Find more sources for CLT homebuyer mortgages</p> <ul style="list-style-type: none"> a. Conduct an outreach, education and recruitment campaign in order to entice more local and socially responsible lenders to offer homebuyer mortgages on CLT properties. b. Negotiate with HUD to allow FHA to guarantee CLT mortgages
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<p>Network Effort (2009-2010) 5.4 Spring Salon – 05/09</p> <p>a. 2011</p> <p>b. 2012</p>	<p>5.4. Provide an environment where experienced practitioners can collaboratively problem-solve around the challenge of supporting homeowners to maintain and improve their homes.</p> <p>a. Assist member CLTs to obtain resources in order to allow leaseholders to upgrade and maintain CLT homes</p> <p>b. Assist member CLTs to develop a post-purchase workshop and hands-on learning opportunity program to ensure that leaseholders have access to the skills needed to upgrade and maintain CLT homes.</p>
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<p>Goal #6 Create and refine a stable and strong organizational infrastructure</p>	<p>Desired Outcomes: The NWCLTC will have clear and concise internal organizational policies and procedures that will result in the efficient and effective administration of the organization.</p>
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Context: Understanding that all organizations need clear and articulated polices and procedures in addition to clear goals and objectives for both success and longevity, the Northwest Community Land Trust Coalition strives for the highest quality in planning documents, polices, procedures and evaluation tools.

<p>Timeline:</p> <p>6.1</p> <p>a. 04/09 for full implementation in 03/10</p> <p>b. 2010</p> <p>c. 2010</p> <p>d. 2009 on-going</p> <p>6.2 Created 02/09 formally approved 05/09</p> <p>6.3 Approval 05/09</p> <p>6.4 Approval 04/09</p>	<p>Strategies:</p> <p>6.1 Create an ambitious Resource Development Plan for The coalition's operating costs.</p> <p>a. Create a manageable and effective annual membership campaign strategy that results in increasing dues from CLT members and supporting members</p> <p>b. Identify additional organizations that create permanent affordable homeownership in Washington, Oregon, Idaho and British Columbia</p> <p>c. Recruit CLT organizations working in the northwest (and others that provide permanently affordable homeownership opportunities) as members (either regular or supporting as appropriate)</p> <p>d. Identify and develop on-going funding stream(s) for coalition work</p> <p>6.2 Create and follow clear and reasonable financial management policies and procedures</p> <p>6.3 Create and implement a Personnel Plan.</p> <p>6.4 Create, abide by and evaluate progress on a regular basis an ambitious yet realistic Strategic Plan.</p> <p>a. Staff and Board will review accomplishments on a quarterly basis at regular board meetings.</p> <p>b. Staff and Board will conduct an annual planning retreat to create an annual work plan in accordance with the Strategic Plan</p>
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<p>6.5 Created and approved by 06/09 6.6 2010</p>	<p>c. Staff and Board will annually review and revise the Strategic Plan as deemed necessary d. Staff and Board will update the strategic plan at least every 5 years. More frequently as warranted.</p> <p>6.5 Create and follow a clear and reasonable conflict of interest policy.</p> <p>6.6 Create a staffing plan in accordance with strategic goals and commensurate with available and projected resources.</p>
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