



CACLTN Real Estate Technical Assistance (TA) Program Overview

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A CLT may find this program helpful when...

- *Trying to determine the feasibility of a specific acquisition opportunity.*
- *Planning for rehab.*
- *Working with tenants to convert units to homeownership.*
- *Developing a property acquisition strategy.*

The Program

It's an exciting time for the CLT movement in California and many CLTs are considering acquiring land and buildings in the area where they work, some for the first time. These opportunities require CLTs to assess the often complex financial and regulatory characteristics of a particular project in addition to taking stock of their own capacity to see it through. In some cases CLTs have already acquired land or housing but are in the midst of planning rehabilitation work or conversions to homeownership.

With support from the Chan Zuckerberg Initiative, CACLTN has launched a robust technical assistance (TA) program to offer CLTs access to expert consultants in real estate development. We hope to expand our technical assistance offerings to other areas of need in the future and will rely on your feedback to help improve on this program.

Who is Eligible?

The Real Estate TA Program offers up to six hours of 1:1 consultant help to current dues-paying members of the California Community Land Trust Network for use on CLT or closely related community ownership projects. If you are unsure about whether your organization is current with its CACLTN membership, please reach out to Shirley Kawafuchi at shirley@cacltnetwork.org.

How will I know if my request has been accepted?

All TA requests must come in through the TA form (below) and be submitted by a staff/board member, or main representative of the CLT/organization if it does not have staff or Board members.

After an organization submits the request form, CACLTN will review and contact the submitter with their approval status. If/when the request is approved, CACLTN will share the request with one of our consultants, who will contact the organization by email within 5-7 business days.

All TA requests are valid for a 3 month period. After 3 months pass, requests must be re-submitted via the TA form. CACLTN will follow up with organizations whose requests are lapsing.

How much TA can I request?

If approved, TA provided through this program will consist of a 60 minute introductory session (online) with an expert consultant followed by up to five hours of follow-up work with the consultant for a total of six hours annually. The follow-up work can consist of subsequent coaching meetings, or hands-on assistance from the consultant such as document review (see [below](#) for descriptions of consultants' expertise).

Who are the TA coaches and what are their areas of expertise?

Land & Liberty – Francis McIlveen

For the past 19 years, Francis worked at the Northern California Land Trust in multiple capacities: handling various real estate transactions—from helping low-income families buy and sell CLT homes, to acquisition & development of new projects (including financing & subsidies), to handling donations of property. Francis also served as the Real Estate Broker for NCLT's Community Realty Brokerage.

Francis oversaw almost all aspects of the acquisition and rehab process for NCLT's anti-displacement projects, including providing technical assistance and training to housing coops and homeowner's associations. He also provided technical assistance and coaching to emerging CLTs.

Francis also has experience handling various organizational and fiduciary responsibilities such as reviewing, negotiating and executing various contracts, financial instruments & similar obligations; participating in the annual audit process; and handling various director level organizational needs.

Areas of Assistance/Coaching:

One on One (i.e. One on organization) assistance with your specific needs in the following areas:

- Assessing the feasibility of potential new projects

- Assembling financing & subsidy needed for new projects
- Plotting a plan—or process—for navigating acquisition & starting development/rehab
- Special considerations for co-op conversions, small site (non-LIHTC) projects, rehab of occupied properties, community driven projects
- Special considerations for CLT ownership models

CTY Housing

CTY Housing is a consulting firm based in Los Angeles that works with affordable housing developers, public agencies, and CDFIs in every stage of the development process, from concept to completion. For our CLT clients, we provide financial feasibility analysis and business planning assistance. Specifically, we have helped CLTs develop a framework for growth that includes evaluating the financial feasibility of different product types, setting development goals, identifying potential partnerships, staffing levels, and job descriptions to enable the CLTs to achieve those goals, identifying strategies for supporting organizational growth, and forecasting organizational revenue and expense.

Areas of Assistance/Coaching:

One on One (i.e. One on organization) assistance with your specific needs in the following areas:

- Assessing the feasibility of potential new projects
- Assembling financing & subsidy needed for new projects
- Plotting a plan—or process—for navigating acquisition & starting development/rehab
- Financial statement analysis
- Strategic planning

How to request technical assistance?

To request technical assistance through this program, please fill out our sign-up form at the following link:

<https://forms.gle/Q7j6BzywPoHqzIso6>

Questions?

Please contact Shirley Kawafuchi, Program Manager, at shirley@cacltnetwork.org.