



FUNCTIONS	RESPONSIBILITY		
	Individually	Collective	Someone Else
SHARED COMMUNITY VISION			
Organize the community			
Conduct a community needs assessment			
Create a shared community vision			
Build & sustain coalitions			
Converting community visions into citywide advocacy			
ORGANIZATIONAL DEVELOPMENT			
Business Planning			
Identify and discuss assumptions around business planning			
Conduct a market and feasibility analysis			
Research and pick a PAH model			
Create Business Plan based on assumptions			
Build partnerships			
Establish CLT Organization			
Decide if your organization will be independent or a program of another			
Decide on board structure			
Create bylaws that conform to CLT structure and operating requirements			
Apply for FEIN & Submit IRS Form 1023 submitted requesting 501(c)(3) designation			
Research and complete other state or municipal filing requirements			
Board of Directors			
Identify board duties and responsibilities stipulated in bylaws			
List characteristics and skills wanted for people to serve on board of directors			
Develop list of key individuals to target for recruitment on first full board			
Develop materials to explain CLT to prospective recruits			
Coordinate orientation of new directors - either one-on-one or small group			
Develop agenda, publicize, convene first meeting of board of directors			
Elect officers, as specified in updated bylaws			
Develop schedule of monthly (or semi-monthly) board of directors meetings			
Develop and distribute agendas for board meetings			
Facilitate board meetings - and take and distribute meeting minutes			
Establish standing committees and appoint directors & chairs			
NON-PROFIT ADMINISTRATION AND OPERATIONS			
Administration/Finance			
Create and monitor annual budget			
Coordinate tax filings (local property taxes; state & federal taxes)			
Pay bills			
Conduct bookkeeping and accounting			
Schedule and coordinate annual audit			
Arrange and update insurance coverage			



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	Individually	Collective	Someone Else
Administer and report on grants			
Board of Directors			
Develop meeting calendar; distribute notice of meetings			
Develop and distribute agendas for board meetings			
Facilitate board meetings			
Take and distribute meeting minutes			
Maintain "board book" of minutes, resolutions, etc.			
Support committees (scheduling, agendas, minutes, etc.)			
Plan and coordinate regular strategic plan and annual workplan			
Recruit & Orient new board members			
Interview and hire executive director			
Conduct annual performance evaluation for executive director			
Conduct regular organizational performance evaluation			
Develop Organizational Policies			
Human Resources			
Develop personnel policy and other HR policies			
Develop job description for each staff member			
Manage payroll			
Coordinate benefits			
Interview and hire staff (other than the ED)			
Establish staff workplan			
Provide regular staff oversight			
Plan and conduct staff training/professional development			
Fundraising			
Identify potential funders			
Develop/update fundraising plan			
Draft proposals to funders			
Maintain regular relationships with funders & up-to-date reporting			
Coordinate outreach to individual donors			
Coordinate fundraising events			
Coordinate administration and reporting			
Community Outreach/Organizing (General Public)			
Develop and distribute brochure, etc.			
Develop and manage web site			
Regular public presentations on organization and CLT model			
Maintain regular contact with media			
Participate in housing coalitions and local policy advocacy			
Membership Development			



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	Individually	Collective	Someone Else
Distribute information about the CLT to prospective members			
Develop membership application; collect completed applications			
Maintain a membership data base			
Coordinate ongoing communication with members (e.g., newsletter, email,)			
Recruit new members (mailings, event tables, etc.)			
Plan and coordinate annual membership meeting			
Recruit and manage volunteers			
Plan and host membership meetings and social gatherings			
HOUSING DEVELOPMENT			
Homebuyer Outreach and Resident Selection			
Produce and distribute general homeowner outreach material			
Develop project-specific marketing plans (HUD affirmative marketing, if required)			
Develop resident selection criteria and procedures			
Advertise available units			
Coordinate regular homebuyer orientations			
Receive and process applications, manage waiting list			
Prescreen applications for eligibility			
Coordinate prepurchase counseling/workshops for potential homebuyers			
Coordinate lender pre-qualification			
Review applicant eligibility (project specific)			
Document applicant qualifications for funders			
Coordinate resident selection			
Project Development			
Negotiate development partnerships			
Identify development sites			
Conduct feasibility analysis of potential sites			
Manage site acquisition			
Secure project approvals, building permits, etc			
Develop & manage project development budgets and proformas			
Identify and secure project financing			
Manage community input into project plans/design			
Oversee project architect			
Manage construction bid process			
Select project contractor			
Construction management			
CLT OPERATIONS & STEWARDSHIP			
Legal and Financial			
Develop project legal documents (ground lease, condo docs, etc.)			
Develop and execute homebuyer disclosure documents, including Letter of Acknowledgement			



FUNCTIONS	RESPONSIBILITY		
	Individually	Collective	Someone Else
Review financing documents			
Execute & manage Purchase and Sale contracts			
Review mortgage instrument and other lender documents for conformance with CLT requirements			
Confirm closing arrangements are in place			
Manage closing/title transfer to buyers			
Arrange for additional mortgage financing options for CLT homebuyers, as needed			
Post-purchase Monitoring & Support			
Maintain regular contact with CLT homeowners/residents			
Coordinate post-purchase homeowner support services (e.g., home maintenance, management training, etc.)			
Conduct regular inspections of CLT properties (per ground lease)			
Collect ground lease fees			
Monitor homeowner payment of real estate taxes and insurance			
Monitor homeowner compliance with insurance coverage requirements			
Monitor and enforce all provisions of ground lease			
Respond (and possibly intervene) if default notices received from lenders			
Manage/maintain common lands or vacant lands held by the CLT			
Resales			
Correspondence w/ outgoing owner			
Calculate limited equity resale price			
Marketing & advertising activity			
Coordinate and manage professional services (appraisals, etc)			
Review applications and meet with prospective homebuyers			
Determine new homebuyer/leaseholder (per established criteria)			
Execute & manage purchase and sale contracts			
Coordinate mortgage lender participation			
Orient new homebuyer(s)			
Coordinate closings			
On-Going CLT Operations			
Evaluate ground lease terms for appropriateness - for new projects (and, potentially, for existing lessees)			
Evaluate ground lease resale formula for appropriateness - for new projects			
Determine and implement insurance limits on lessees' ground lease			
Determine and implement ground lease fees on lessees' ground lease anniversary dates			
Explore use of CLT "framework" for other types of residential uses			
Participate in statewide, regional and national CLT initiatives			
Implement and maintain data collections system to gather/synthesize data needed to document effectiveness of CLT and CLT model			