

Key Findings from the California Community Land Trust Network Survey

The California CLT Survey

With Community Land Trusts (CLTs) emerging across the state of California to meet the challenges of the housing crisis, the CA CLT Network set out to quantify CLT activity through a survey of its member organizations and their residents.

All CLTs share core elements in common: they create and maintain permanently affordable housing for low-income households by removing property from the speculative market and retaining the long-term ownership of land. However, there is also a great deal of variation as well, from what types of housing they focus on, to where they work, to the additional benefits they provide to their communities. The CLT Survey sought to capture the full spectrum of CLT activities as well as lift up insights into what CLTs need to grow and thrive.

The CA CLT Network worked with Tim Thomas, Mona Al-Abadi, and Hannah Phalen, three independent researchers associated with UC Berkeley to develop and implement a survey of CLT organizations and a survey of CLT residents. Surveys were distributed during the summer of 2021 and final responses were gathered near the end of the calendar year. The results presented here represent specific highlights from the surveys. The CLT Network plans to continue updating the survey results and making more data points available.

Findings

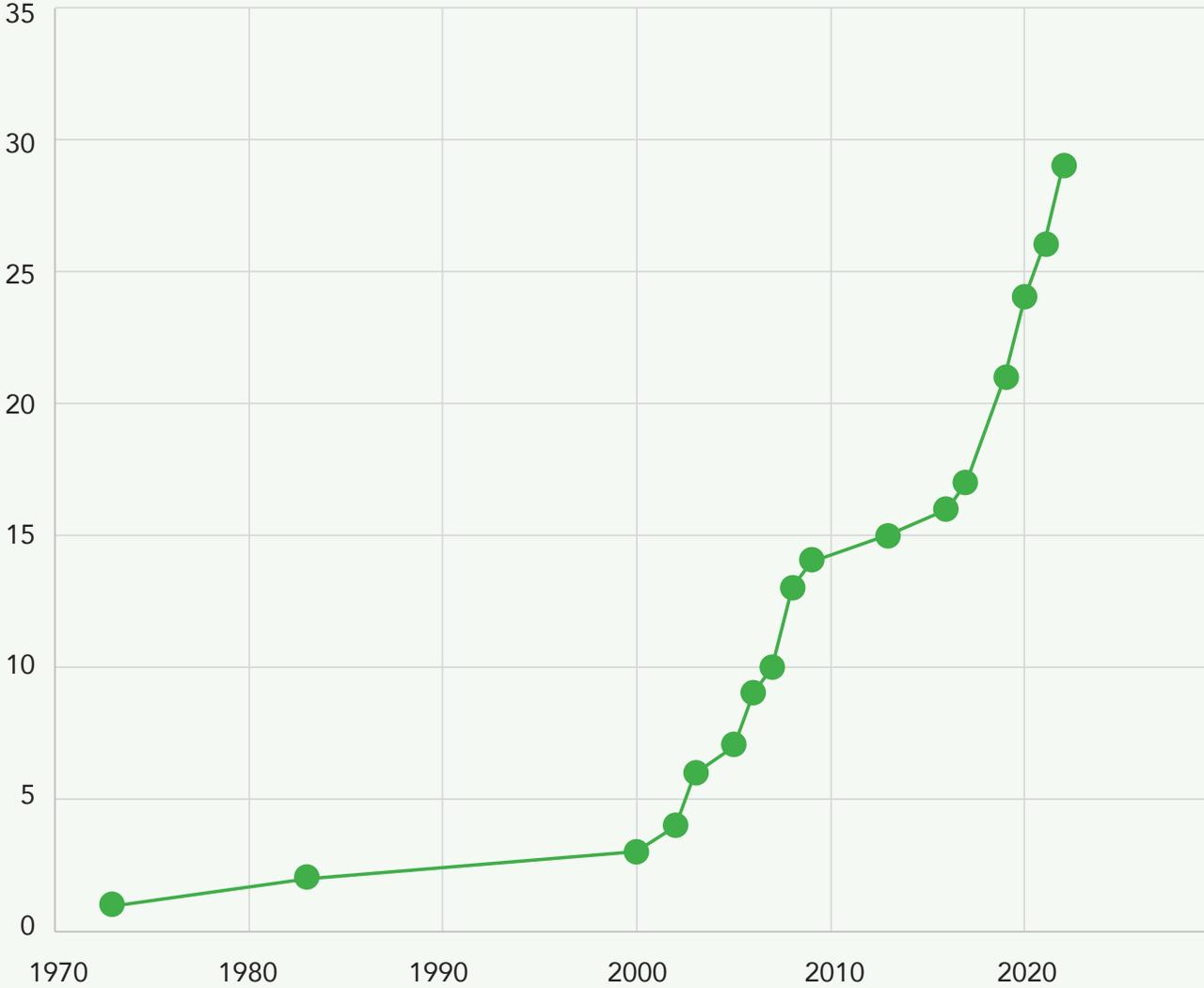
1. CLTs are expanding their footprint
2. CA CLTs serve low-income and POC populations
3. CA CLTs are providing residents with economic security
4. CA CLT's rely on program revenues and local government subsidy
5. CLTs deploy a variety of stewardship and resident engagement strategies
6. Funding and staff capacity are the primary obstacles to CLT success
7. CA CLT Pipelines are substantial and diverse

1. CLTs are Expanding Their Footprint

The urgency of California’s housing affordability crisis has caused communities across the state to explore the CLT model as a strategy to fight displacement and speculation. Today, the state has 29 Community Land Trusts in 22 Counties with over 1,600 housing units home to over 3,500 residents. While the state’s first CLTs were concentrated in the large metro areas, today community groups are forming CLTs in rural, suburban and core-urban areas.



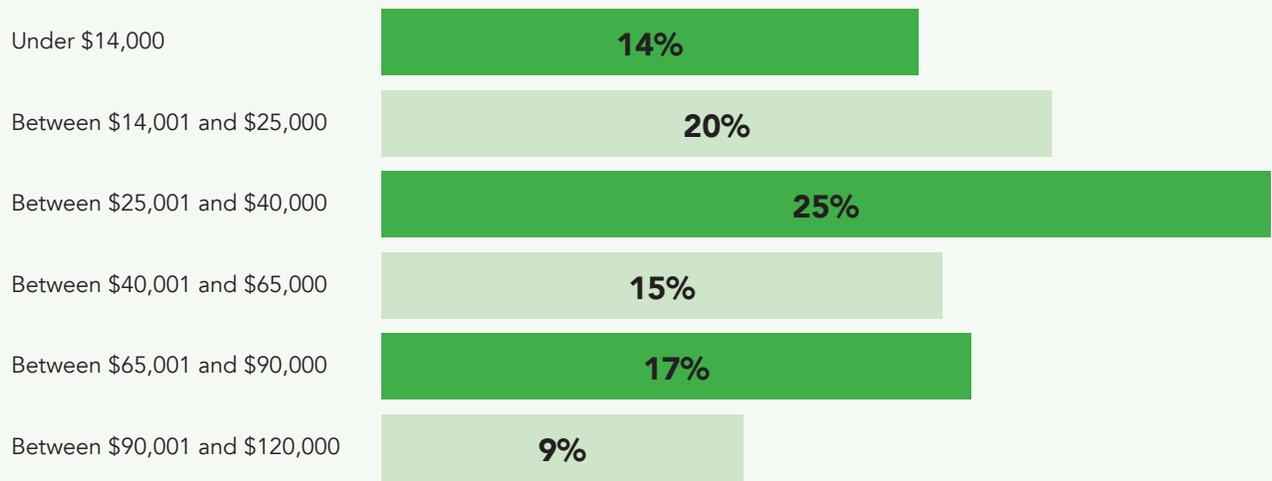
Number of CLTs in California



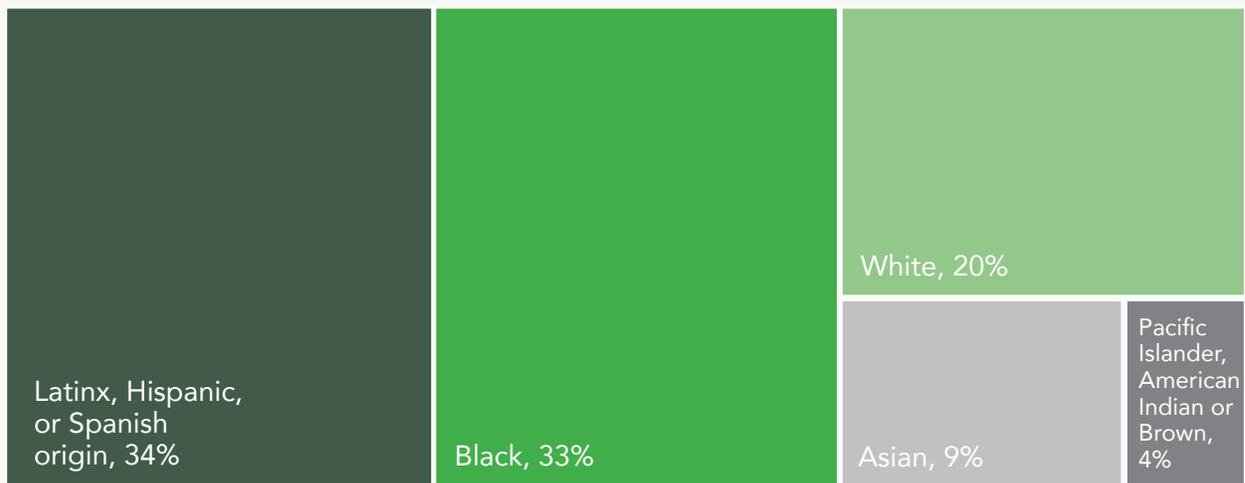
2. CA CLTs Primarily Serve Low-Income and BIPOC Populations

CLTs overwhelmingly serve low-income populations and households of color. 60% of CLT residents have an annual household income of under \$40,000 and 80% of CLT residents are Black, Indigenous, and people of color.

Annual Household Income of CLT Residents



80% of CLT residents are Black, Indigenous, and People of Color



3. CA CLTs are Providing Residents with Economic Security

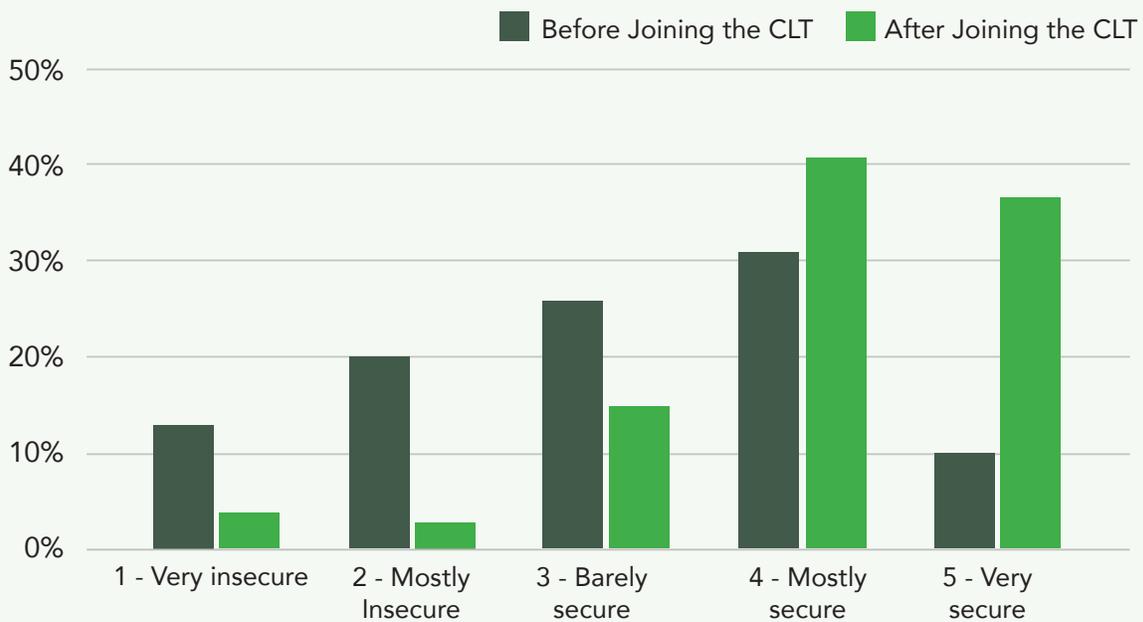
Resident survey responses demonstrate that CLTs are providing residents with economic security: Only 40% of respondents reported that they felt “mostly” or “very” economically secure before moving into their CLT home, but 76% report feeling “mostly” or “very” economically secure after moving into their CLT home.

60% Residents reporting an increase in their family's economic security after moving to a CLT home

33% Residents reporting a sustained level of family economic security after moving to a CLT home

7% Residents reporting a decrease in their family's economic security after moving to a CLT home

Economic Security

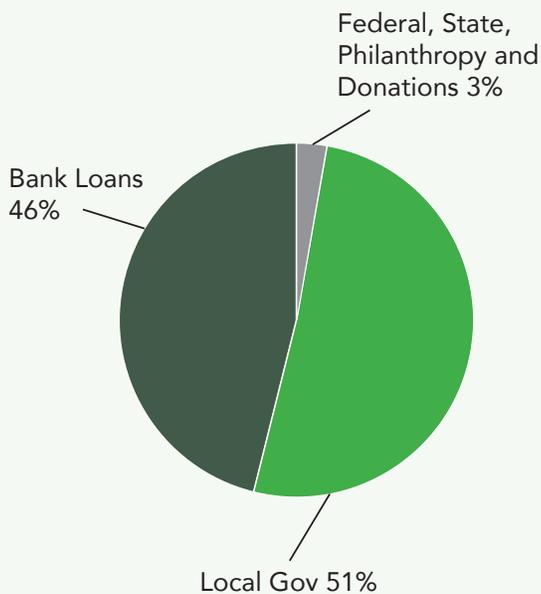


4. CLTs Currently Rely on Program Revenues & Local Government Subsidy

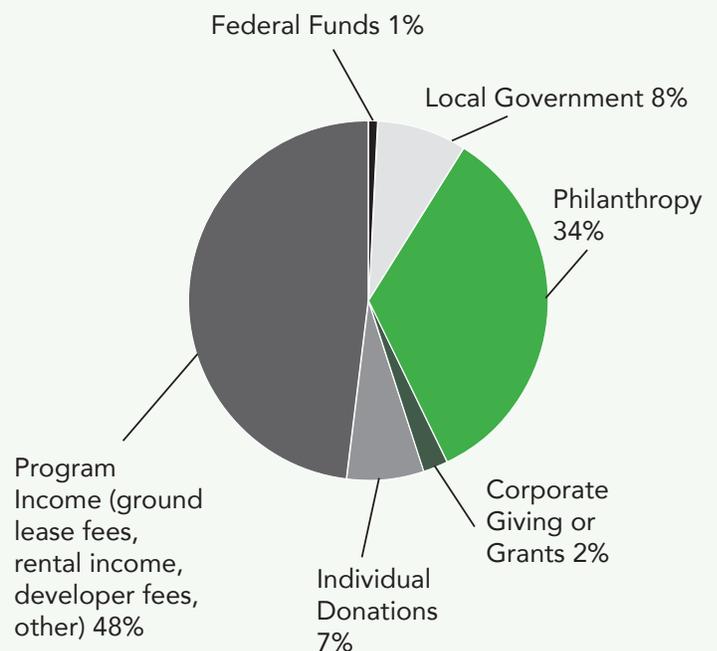
The Survey revealed that CLTs heavily utilize bank loans and local government subsidies (whether grants or loans) for capital funding—the dollars used to acquire, develop and invest in housing and other CLT projects. At present, State and Federal funds are an insubstantial source of capital funding.

CLT operating budgets are drawn from a different set of sources. Nearly half (48%) of CLT operating funds are drawn from program income, whether rents, ground lease fees, or other revenues. Philanthropy provides the second largest source (34%), with individual donations (7%) and local government grants (8%) providing ancillary support.

CLT Capital Budget Sources



CLT Operating Budget Sources



5. CLTs Deploy a Variety of Stewardship and Resident Engagement Strategies

Services, trainings, and organizing are central to how CLTs support their residents. The survey found that CLT residents are taking advantage of a broad range of services and activities offered by their land trusts.



Building Human Capital

- Financial counseling
- Homebuyer classes and support
- Employment workshops
- Employment opportunities within the CLT
- Leadership programs



Support Services

- Activities for children
- Disaster preparation
- Supportive housing services



Building Collective Capacity

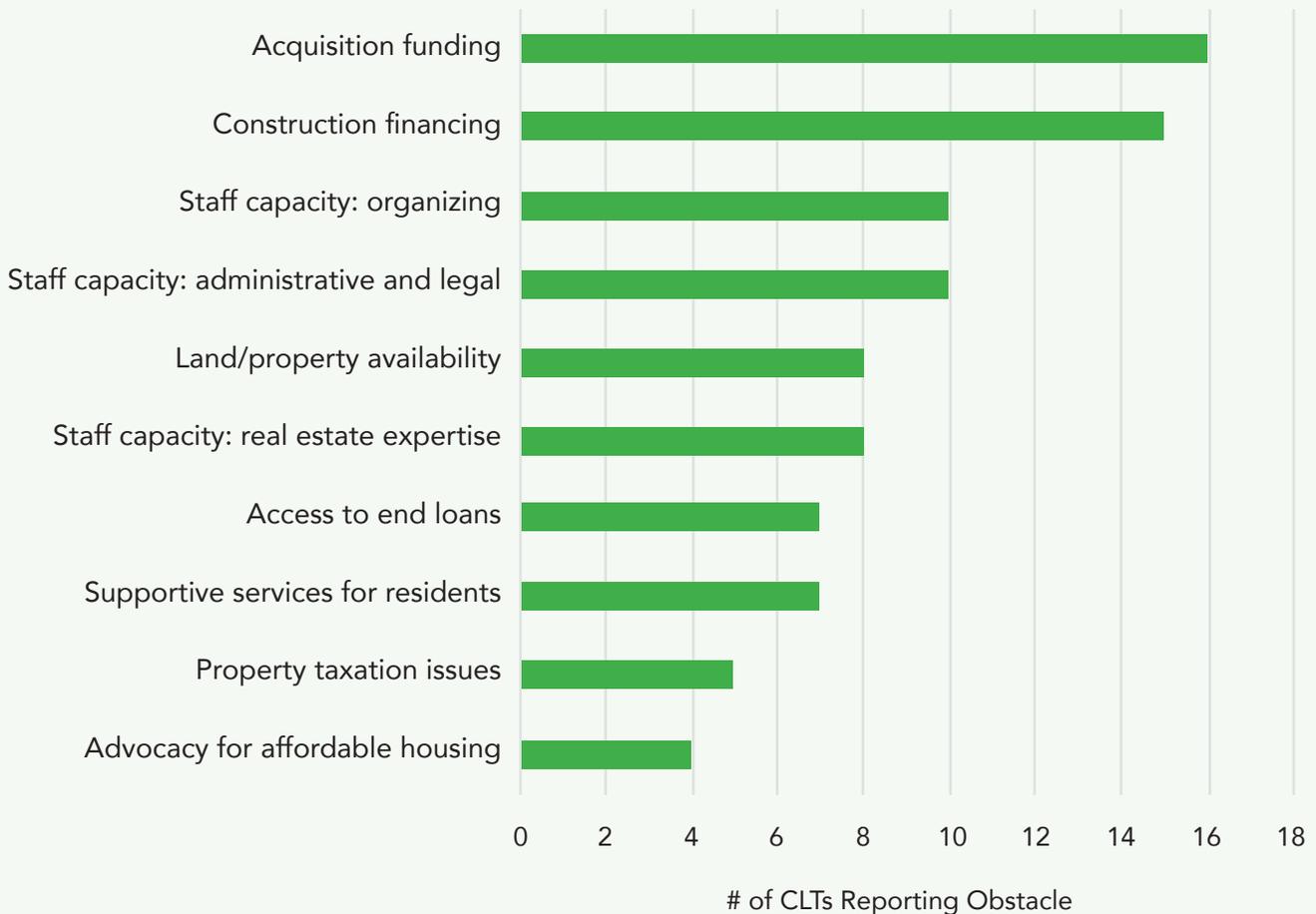
- Collective management training
- Resident/ownership training
- Homeowner and/or resident associations
- Networking opportunities
- Resource linkage

68% of CLT households report participating in CLT events

6. Funding and Staff Capacity are the Primary Obstacles to CLT Success

The survey provided insights on the main obstacles CLTs in California face in carrying out their work and achieving their goals. Funding for the acquisition of land and buildings and construction financing were the two issues most commonly identified.

Obstacles that prevent CLTs from accomplishing their goals



7. CA CLT Pipelines are Substantial and Diverse

The survey indicates that CA CLTs have a substantial number of projects in development. While Housing is the primary focus of current pipelines, CLTs reported that projects are planned for a number of other land uses including commercial buildings, urban farms, childcare & social service community hubs, and supportive and transitional housing.

Project Types in CLT Pipelines

- Multi-family Rental
- Single Family Homeownership
- Condo Homeownership
- Cooperative Homeownership
- Urban Agriculture
- Affordable Commercial
- Open Space Conservation
- Accessory Dwelling Units

Pending Projects*	163
Financing Secured	98,832,070
Financing Needed	97,650,000

** Ranging from single family homes to large apartment complexes*

About the California Community Land Trust Network

The California Community Land Trust Network is a membership organization representing 29 Community Land Trusts throughout the state of California from Humboldt County to San Diego. CACLTN supports the work of its member organizations and communities through state level policy advocacy, member and community conferences, peer-peer training, capacity building through the CA CLT Academy, and development of financial/legal tools to enhance CLT development in California.

For more information about CLTs or the CA CLT Network, please contact us at www.cacltnetwork.org/contact-us



Acknowledgments

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