A Survey of Community Land Trusts in California
Agenda

- Meet the Research Team
- Purpose of Surveys
- Contents of Surveys
- Survey Methodology
- Survey Findings
- Survey Limitations
- Survey: Next Steps
Meet the Research Team

Tim Thomas  
Research Director

Mona Al-Abadi  
Graduate Student 
Researcher

Hannah Phalen  
Graduate Student 
Researcher
Why Are These Surveys Important?

- Provides holistic picture of diverse CLT activities in California
- Quantifies impact of CLT stewardship on residents & neighborhoods
- Offers insight into critical resident demographics
- Understand and assess the needs of residents and CLT staff
- Garners support from government & foundation stakeholders
## Contents of Surveys: A Brief Overview

We created two surveys:  

<table>
<thead>
<tr>
<th>Contents of Resident Survey</th>
<th>Contents of Organizational Survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of residence</td>
<td>CLT priorities</td>
</tr>
<tr>
<td>Average income &amp; sources</td>
<td>Acquisition</td>
</tr>
<tr>
<td>Length of residency &amp; intended stay</td>
<td>Demographics</td>
</tr>
<tr>
<td>Languages spoken &amp; racial/ethnic composition</td>
<td>Residents</td>
</tr>
<tr>
<td>Quality of residence</td>
<td>Staffing</td>
</tr>
<tr>
<td>Neighborhood amenities</td>
<td>Services offered</td>
</tr>
<tr>
<td>Perception of safety</td>
<td>Governance</td>
</tr>
<tr>
<td>Perception of economic security</td>
<td>Legislation</td>
</tr>
<tr>
<td>Services offered and desired services</td>
<td>Finances</td>
</tr>
<tr>
<td>Community participation</td>
<td>Contact information</td>
</tr>
</tbody>
</table>
Survey Methodology

Survey Creation

Survey Deployment

Survey Data Collection & Analysis
Survey Methodology

- CACLTN board provided a list of priorities for both surveys and a copy of a COVID-19 resident survey to guide the research team in drafting survey questions.

- Formulated survey questions in reference to three tiers:
  1. What does the CACLTN have to know?
  2. What should the CACLTN know?
  3. What does the CACLTN want to know?

- A survey question worksheet was shared with the CACLTN board to rank questions of importance to use in draft versions of each survey:
  - Various meetings with CACLTN were conducted to narrow down questions and create draft surveys (3 month process)
  - Survey questions were inputted in Qualtrics, a secure, web-based survey tool and survey links were sent to the board for testing.
Survey Methodology

- Survey Pilot Testing
  - Over the course of 3 months, CA CLTN provided questions and recommendations and translation services for each survey

- Surveys were translated in the following languages:
  - Organizational survey: English & Spanish
  - Resident survey: English, Spanish, Mandarin/Cantonese
A CLT survey training session was conducted to prepare CLT staff for survey deployment. The training reviewed:

- Research goals
- Survey timeline
- Contents of each survey
- Tips for communicating with residents

- **Incentives**
  - 1 entry for a chance to win $100 Visa gift card (10 winners randomly selected)

- **Translation services**
  - Resident surveys available in English, Spanish, Mandarin/Cantonese (both online & on paper)

- **Resource library**
- **Survey deployment process**
  - Email blasts to residents
  - Post flyers
  - Weekly reminders (in-person & via email) to residents along with reminders from CACLTN & research team
Survey Methodology

[AMENDED] Surveys Timeline

- **June**
  - 6/15 - 6/21: Outreach to residents
  - 6/14: Release surveys & post flyers

- **July**
  - 6/28: Reminder emails/calls, targeted outreach
  - 7/2, 7/15, 8/15: Surveys close

- **August**
  - 8/1: Sweepstake winners are chosen
Survey Methodology

- Survey responses were collected and logged using a secure, web-based survey tool called Qualtrics.
- Survey responses were exported using Google Sheets for data analysis.
- Several data workbooks were created to visualize survey data:
  - Organizational survey data workbook
  - Resident survey data workbook
    - Northern California Land Trust resident survey data workbook
    - San Francisco Community Land Trust resident survey data workbook
- 10 winners were randomly selected for the sweepstakes incentive:
  - Academic research staff member picked 10 numbers at random and emailed them to another researcher and CACLTN staff.
  - Each randomly selected number corresponded to survey respondent name and contact information.
- Periodic updates will be provided after August and into January 2022.
### Organizational Survey Findings

- Project types & units
- Legal structure
- Resident waitlist
- Common obstacles
- Staffing
- CLT priorities

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#### At A Glance Data Dashboard

Data will automatically update based on the "Raw Data" sheet, last updated 8/14/21

**At A Glance**
- Number of CLT respondents: 37
- Number of CLTs that serve multiple counties/cities: 7
- Total number of projects across California: 1,141
- Total number of CLT units across California: 1,328
- Percentage of CLTs that are membership-based organizations: 71%
- Number of voting members: 1,049

**Project Types**
- **Rental**: 7
- **Single-family/condo homeownership**: 5
- **Cooperative**: 4
- **Limited equity housing cooperative**: 4
- **Urban farm**: 1
- **Commercial**: 6
- **Other**: 5

*CLT organization could select more than one project type

**Units (by Community Land Trust)**

<table>
<thead>
<tr>
<th>Community Land Trust</th>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bay Area Community Land Trust</td>
<td>5</td>
</tr>
</tbody>
</table>

---
Organizational Survey Findings: Project Types & Units

114 CLT projects across California

1,328 CLT units across California
Organizational Survey Findings: Diversity of Legal Structures

Community Land Trusts in California: Current Legal Structure
- Standalone 501(c)(3): 94.1%
- Fiscally sponsored by: 5.9%

Community Land Trusts in California: Types of Legal Structures Used for CLT Projects
- Limited
- LLMC, retail
- Limited-equity
- Zero-equity retail
- Resident
- Other retail
- Single-family
- Homeownership
- Single-member
- Multi-member, LLC
- Lease to own
- ADU
- Other

Type of Legal Structure

Number of Community Land Trusts
Organizational Survey Findings: Resident Waitlist

3,024 total residents living in CLTs

53% of CLTs have a waitlist

7,844 total applicants on the waitlist
Organizational Survey Findings: Common Obstacles

Community Land Trusts in California: Obstacles

- Acquisition funding
- Land/property availability
- Advocacy for affordable housing
- Resident retention
- Supportive services for residents
- Staff capacity: organizing
- Staff capacity: real estate expertise
- Staff capacity: administrative and legal
- Property taxation issues
- Community support
- Construction financing
- Access to end loans
- Other

Number of Community Land Trusts
Organizational Survey Findings: Staffing
## Organizational Survey Findings: CLT Priorities

<table>
<thead>
<tr>
<th>Community Land Trust: Priorities</th>
<th>Strongly disagree</th>
<th>Disagree</th>
<th>Neither agree or disagree</th>
<th>Agree</th>
<th>Strongly agree</th>
<th>Not applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anti-displacement</td>
<td>0</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>12</td>
<td>0</td>
</tr>
<tr>
<td>Asset building/wealth building for residents</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>4</td>
<td>9</td>
<td>0</td>
</tr>
<tr>
<td>Addressing housing instability</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>2</td>
<td>13</td>
<td>0</td>
</tr>
<tr>
<td>Building community power to shape our neighborhoods</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>1</td>
<td>13</td>
<td>0</td>
</tr>
<tr>
<td>Permanent affordability of housing</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>16</td>
<td>0</td>
</tr>
<tr>
<td>Homeownership</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>2</td>
<td>11</td>
<td>0</td>
</tr>
<tr>
<td>Addressing the racial wealth gap</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>7</td>
<td>9</td>
<td>0</td>
</tr>
<tr>
<td>Addressing environmental conservation and/or justice issues</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>5</td>
<td>7</td>
<td>1</td>
</tr>
<tr>
<td>Firm financial footing a year from now</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>5</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Members/residents understand the CLT model</td>
<td>0</td>
<td>4</td>
<td>5</td>
<td>6</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Board members understand the CLT model</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>7</td>
<td>8</td>
<td>0</td>
</tr>
<tr>
<td>Critical government stakeholder partnerships understand the CLT model</td>
<td>1</td>
<td>4</td>
<td>3</td>
<td>5</td>
<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Critical nonprofit, funder and development stakeholders partnerships understand the CLT model</td>
<td>2</td>
<td>1</td>
<td>4</td>
<td>6</td>
<td>4</td>
<td>0</td>
</tr>
<tr>
<td>Members/residents feel empowered to help determine the direction of the CLT</td>
<td>1</td>
<td>3</td>
<td>4</td>
<td>6</td>
<td>3</td>
<td>0</td>
</tr>
</tbody>
</table>

*Darker blue indicates a higher count (on a scale)*
# Residential Survey Findings

- Demographics
- Financials
- Housing
- Transportation
- Other
  - Community Participation
  - Use of CLT Services
  - Meets NOT Being Met
  - Reasons for Moving to a CLT
Resident Survey Findings: Demographics

Racial and Ethnic Composition of Residents (Total)

- White: 46.1%
- Asian: 17.3%
- African American or Black: 8.1%
- Native Hawaiian or Other: 1.5%
- Brown: 0.8%
- Alaska Native: 0.5%
- Other: 20.5%

Race of Residents; non-Hispanic, Latinx or Spanish Origin

- White: 53.9%
- Asian: 13.7%
- African American or Black: 10.3%
- Brown: 6.2%
- Native Hawaiian or other: 0.7%
- Other: 19.0%

Race of Residents; Hispanic, Latinx or Spanish Origin

- White: 15.4%
- Other: 53.9%
- Native Hawaiian or other: 2.6%
- Brown: 23.1%
- Alaska Native: 2.6%
Resident Survey Findings: Demographics

### Education Level

<table>
<thead>
<tr>
<th>Education Level</th>
<th>Resident Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>High School</td>
<td>80</td>
</tr>
<tr>
<td>Bachelor's</td>
<td>60</td>
</tr>
<tr>
<td>Master's</td>
<td>40</td>
</tr>
<tr>
<td>Ph.D. or</td>
<td>20</td>
</tr>
<tr>
<td>Trade School</td>
<td>10</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
</tr>
<tr>
<td>Professional/</td>
<td>5</td>
</tr>
<tr>
<td>Formal</td>
<td>1</td>
</tr>
</tbody>
</table>

### Household Data

<table>
<thead>
<tr>
<th>Household Data</th>
<th>n (households)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.9 adults in each household</td>
<td>121</td>
</tr>
<tr>
<td>0.5 children in each household</td>
<td>102</td>
</tr>
<tr>
<td>2.5 average household size</td>
<td>121</td>
</tr>
<tr>
<td>32.5% of households have children</td>
<td>102</td>
</tr>
</tbody>
</table>

### Demographics

<table>
<thead>
<tr>
<th>Demographics</th>
<th>n (individuals)</th>
</tr>
</thead>
<tbody>
<tr>
<td>48 average age of adults</td>
<td>176</td>
</tr>
<tr>
<td>47 median age of adults</td>
<td>176</td>
</tr>
<tr>
<td>23.4% of residents have a disability</td>
<td>102</td>
</tr>
</tbody>
</table>
Resident Survey Findings: Resident Financial

### Income

<table>
<thead>
<tr>
<th>Category</th>
<th>Resident Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $14,000</td>
<td>10</td>
</tr>
<tr>
<td>Between $14,001 and $25,000</td>
<td>15</td>
</tr>
<tr>
<td>Between $25,001 and $40,000</td>
<td>30</td>
</tr>
<tr>
<td>Between $40,001 and $65,000</td>
<td>20</td>
</tr>
<tr>
<td>Between $65,001 and $90,000</td>
<td>15</td>
</tr>
<tr>
<td>Between $90,001 and $120,000</td>
<td>10</td>
</tr>
<tr>
<td>Above $120,001</td>
<td>5</td>
</tr>
</tbody>
</table>
Resident Survey Findings: Financial

Sources of Income

- Employment
- Public
- Social
- Individual
- Employer
- Disability
- Self
- Other
## Household Spending Per Month

<table>
<thead>
<tr>
<th>Household Spending Per Month</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,408</td>
<td>99</td>
</tr>
<tr>
<td>average spending on housing</td>
<td></td>
</tr>
<tr>
<td>$896</td>
<td>16</td>
</tr>
<tr>
<td>average spending on childcare (if any)</td>
<td></td>
</tr>
<tr>
<td>$601</td>
<td>103</td>
</tr>
<tr>
<td>average spending on food</td>
<td></td>
</tr>
<tr>
<td>$172</td>
<td>102</td>
</tr>
<tr>
<td>average spending on utilities</td>
<td></td>
</tr>
<tr>
<td>36.9% of residents send financial support to</td>
<td>104</td>
</tr>
<tr>
<td>someone outside of their household</td>
<td></td>
</tr>
</tbody>
</table>

### CA Averages
- $1,568 (including utilities)
- $1,300
- $733
Housing Quality & Economic Security

Economic Security

- Quality of Physical Home
  - Well maintained, well dec...: 35%
  - Generally meets basic co...: 25%
  - Poor, significant issues vd...: 15%
  - Very poor, dangerous, etc...: 10%
  - Better than average: 15%

- Neighborhood Safety
  - Well maintained, well dec...: 30%
  - Generally meets basic co...: 20%
  - Poor, significant issues vd...: 30%
  - Very poor, dangerous, etc...: 20%
  - Better than average: 10%

- Sense of Safety Inside the Home
  - Well maintained, well dec...: 25%
  - Generally meets basic co...: 25%
  - Poor, significant issues vd...: 25%
  - Very poor, dangerous, etc...: 25%
  - Better than average: 25%

Average Ratings

<table>
<thead>
<tr>
<th>Average Rating</th>
<th>n</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.3</td>
<td>100</td>
</tr>
<tr>
<td>3.8</td>
<td>100</td>
</tr>
<tr>
<td>4.3</td>
<td>100</td>
</tr>
</tbody>
</table>
Resident Survey Findings: Transportation

### Proximity to Amenities

<table>
<thead>
<tr>
<th>Proximity to Amenities</th>
<th>Work</th>
<th>Hospital</th>
<th>Doctor's Office</th>
<th>Post Office</th>
<th>Childcare</th>
<th>Grocery Store</th>
<th>Outdoor Recreational Activities</th>
<th>Transit Hub</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10 Minutes</td>
<td>29</td>
<td>34</td>
<td>29</td>
<td>72</td>
<td>13</td>
<td>73</td>
<td>39</td>
<td>62</td>
</tr>
<tr>
<td>10-20 Minutes</td>
<td>33</td>
<td>47</td>
<td>47</td>
<td>39</td>
<td>12</td>
<td>38</td>
<td>35</td>
<td>36</td>
</tr>
<tr>
<td>20-30 Minutes</td>
<td>14</td>
<td>21</td>
<td>30</td>
<td>7</td>
<td>7</td>
<td>6</td>
<td>12</td>
<td>10</td>
</tr>
<tr>
<td>30-40 Minutes</td>
<td>8</td>
<td>7</td>
<td>6</td>
<td>1</td>
<td>3</td>
<td>0</td>
<td>7</td>
<td>1</td>
</tr>
<tr>
<td>40+ minutes</td>
<td>2</td>
<td>12</td>
<td>7</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>5</td>
</tr>
</tbody>
</table>

*dark blue indicates a higher count (on a scale)*

### Time per Day Spent on Travel

- Less than 10 min: 10-20 minutes
- 20-30 minutes: 30-45 minutes
- Over 45 minutes: 1 hour - 1.5 hours
- Over 1.5 hours: Work From Home
- Unemployed

### Main Mode of Transportation

- Other: 0.7%
- Walk: 19.1%
- Carpool: 17.5%
- Bike: 17.5%
- Bus: 10.1%
- Train: 7.0%
- Personal Vehicle: 31.7%
Resident Survey Findings: Open Response Questions

- Why Residents Chose to Live in a CLT
  - Affordability/financial reasons
  - Belief in the cooperative movement/land trust model
  - Belonging to a community
  - Stability & security/wanting a long-term residence
  - Grandfathered in when CLT bought the building
  - Only option for homeownership
  - Heard about the CLT from friends or online

- Needs NOT Being Met
  - Conflict resolution and management/residential dispute issues
  - Outdoor activities
  - Preventative property maintenance
Survey Limitations

- **Survey delays**
  - Surveys were finalized in May 2021, leaving a short window for deployment and data analysis

- **Low response rate**
  - Resident survey response rate: 125 out of an estimated 1,100 residents across all CLT properties

- **Missing/incomplete data from CLT organizations and CLT residents**

- **Extenuating circumstances**
  - Limited staff capacity
  - Some CLTs had no residents at all and could not share surveys

- **Residents’ privacy & anonymity**
  - Inability to provide CLT-specific data workbooks; especially for CLTs with fewer residents where resident identity could be revealed
Where Do We Go From Here?  
Survey: Next Steps

- CACLTN will follow up with CLT organizations and residents who have a) not submitted the organizational survey and/or are still missing resident surveys
- CACLTN will analyze CLT addresses submitted as part of the survey and provide further analyses in late 2021
- Academic research staff will continue to update the survey data responses as they come in
Thank You!

A special thanks to:

**Contributors/Supervisors of Research Project**
Saki Bailey
Jen Collins
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Oscar Monge
Ian Winters

**CACLTN Administrative Staff**
Jose Arebalo
Devon Fitzgerald

**Foreign Language Translation/Interpretation**
Oscar Arteta (Spanish)
Lluvia Cardenas (Spanish)
Junli Dai (Chinese/Mandarin)
Francisco J. Meza (Spanish)

**CLT Organizational Survey Respondents**
Bolinas Community Land Trust
Beverley -Vermont CLT
Community Land Trust Association of West Marin
Commonspace Community Land Trust
El Sereno Community Land Trust
Fideicomiso Comunitario Tierra Libre
Housing Humboldt
Inland Equity Community Land Trust
Irvine Community Land Trust
Meadow Farm Community Land Trust
Northern California Community Land Trust
Oakland Community Land Trust
Richmond LAND
Sacramento Community Land Trust
Saint Joseph Community Land Trust
San Diego Community Land Trust
San Francisco Community Land Trust
T.R.U.S.T. South LA

**Research Project Funder**
Chan Zuckerberg Initiative

**All CLT Resident Survey Respondents**