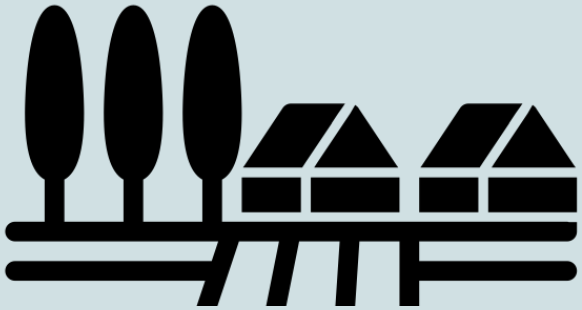
A Survey of Community Land Trusts in California



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

Offers insight into critical resident demographics

Quantifies impact of CLT stewardship on residents & neighborhoods

Understand and assess the needs of residents and CLT staff

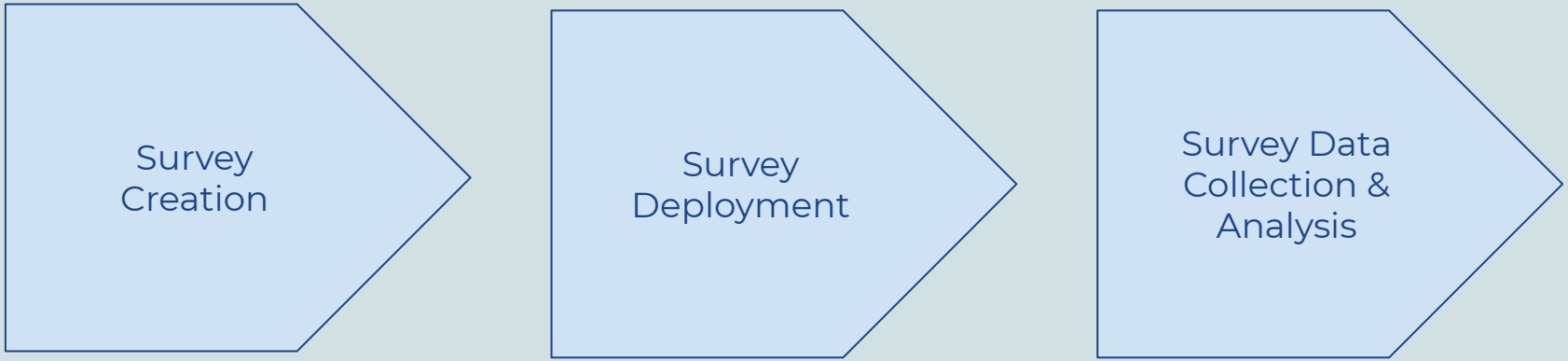
Garners support from government & foundation stakeholders

Contents of Surveys: A Brief Overview

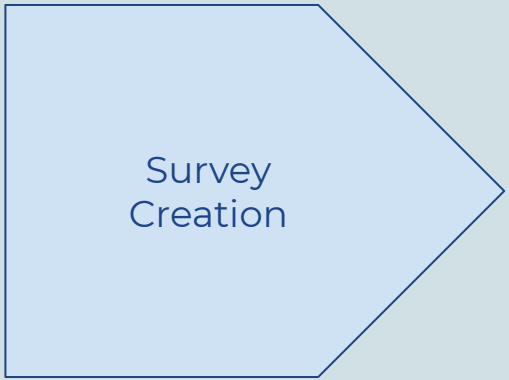
We created two surveys:

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

Survey Methodology

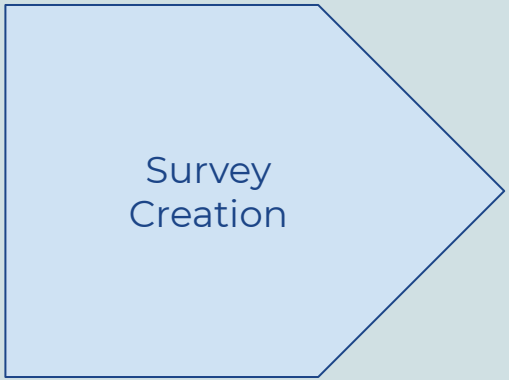


Survey Methodology



- 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, CACLTN 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

Survey Methodology

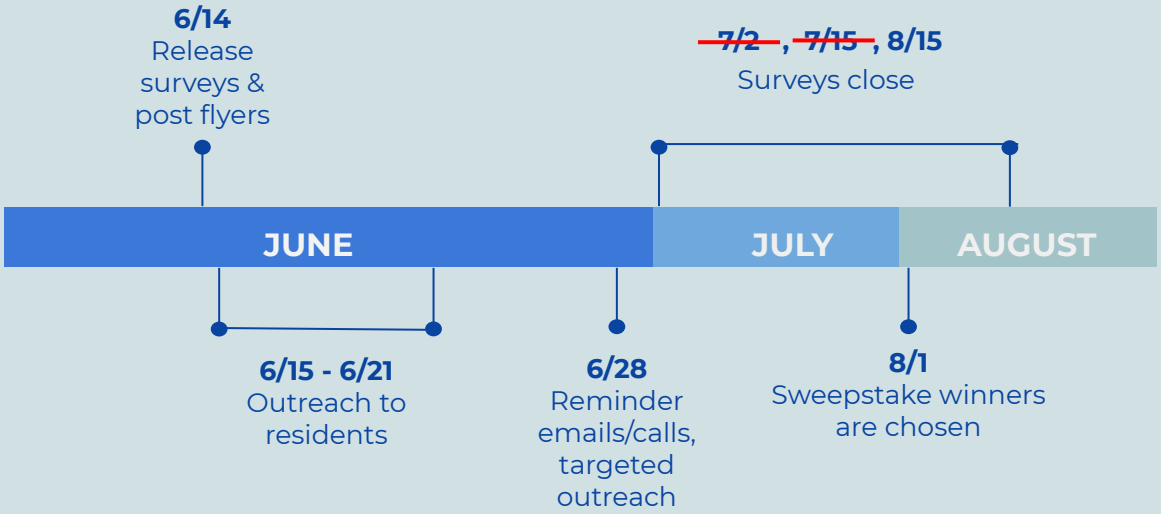
Survey Deployment

- 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

Survey Deployment

[AMENDED] Surveys Timeline



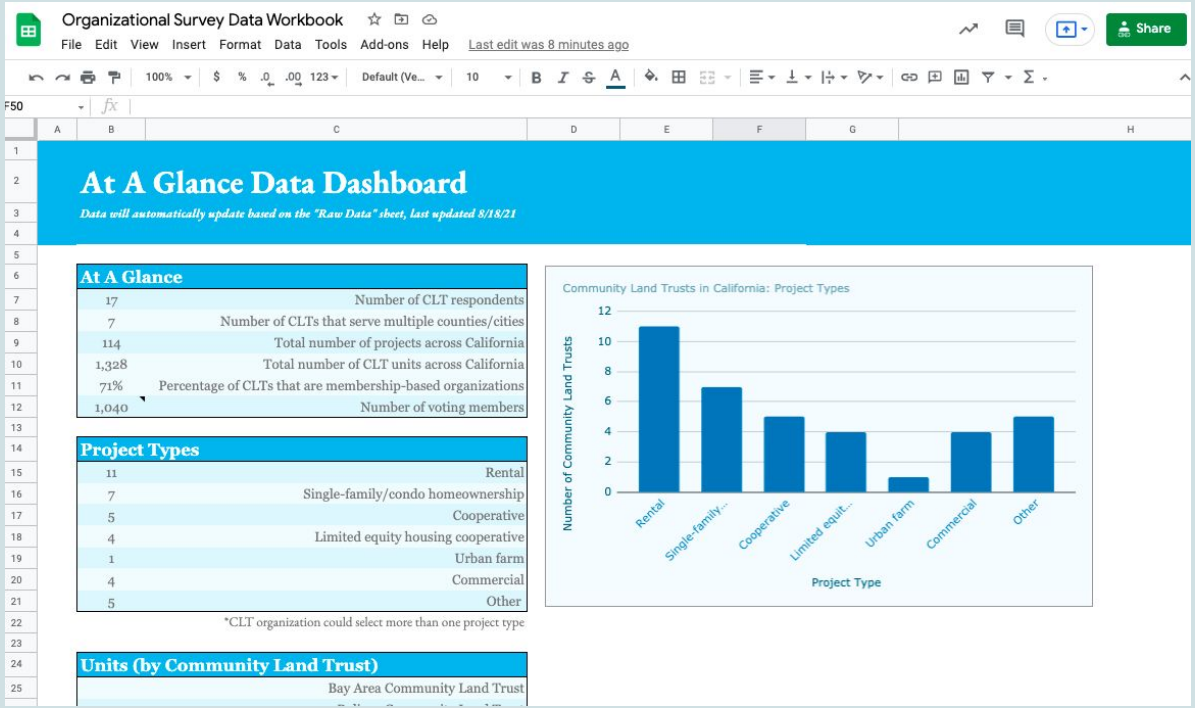
Survey Methodology

Survey Data Collection & Analysis

- 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



Organizational Survey Data Workbook

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At A Glance Data Dashboard

Data will automatically update based on the "Raw Data" sheet, last updated 8/18/21

At A Glance	
17	Number of CLT respondents
7	Number of CLTs that serve multiple counties/cities
114	Total number of projects across California
1,328	Total number of CLT units across California
71%	Percentage of CLTs that are membership-based organizations
1,040	Number of voting members

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

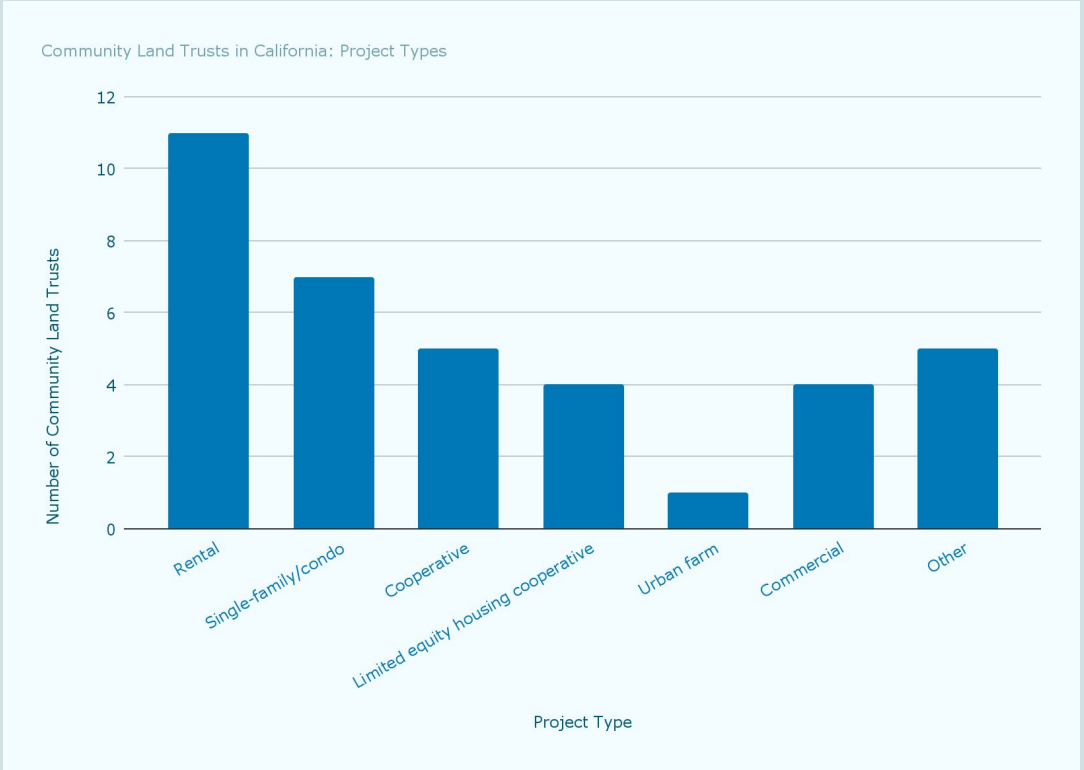
*CLT organization could select more than one project type

Units (by Community Land Trust)	
	Bay Area Community Land Trust

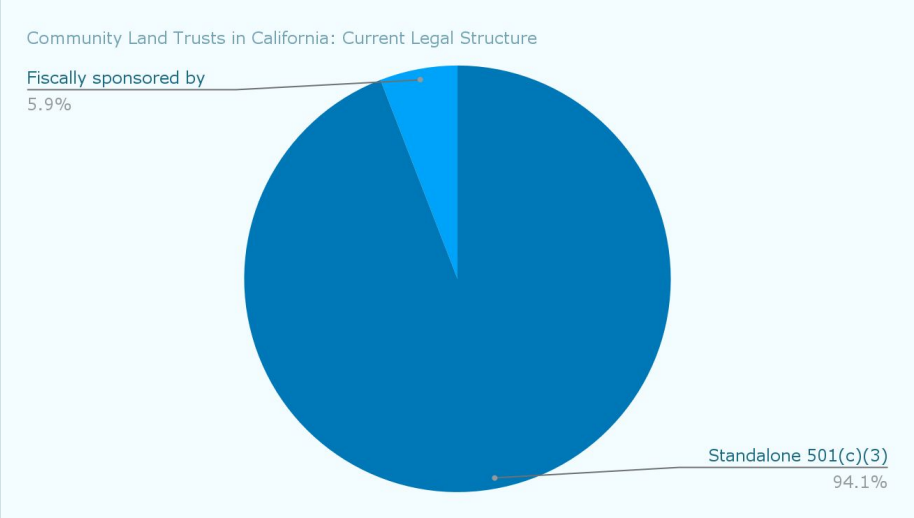
Organizational Survey Findings: Project Types & Units

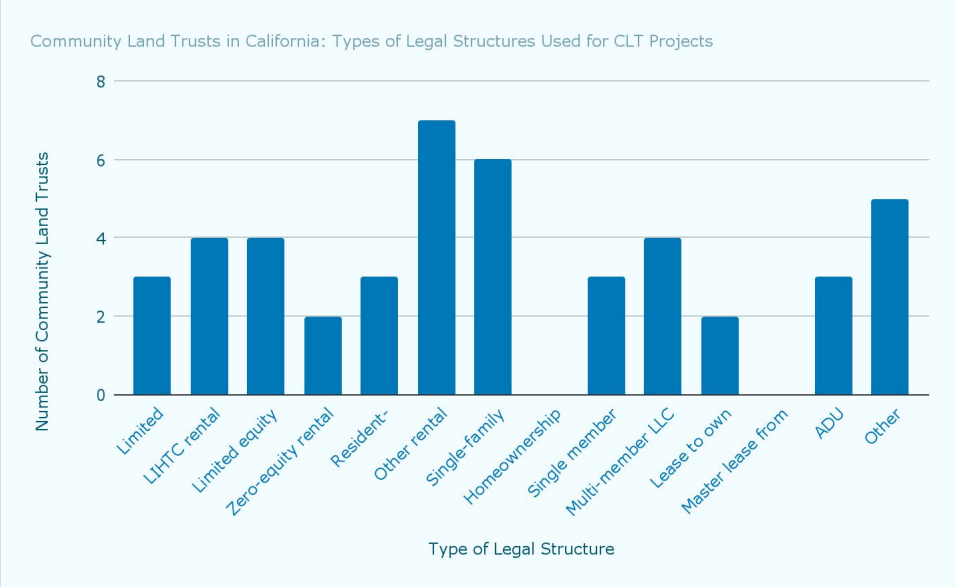
114 CLT projects across California

1,328 CLT units across California



Organizational Survey Findings: Diversity of Legal Structures





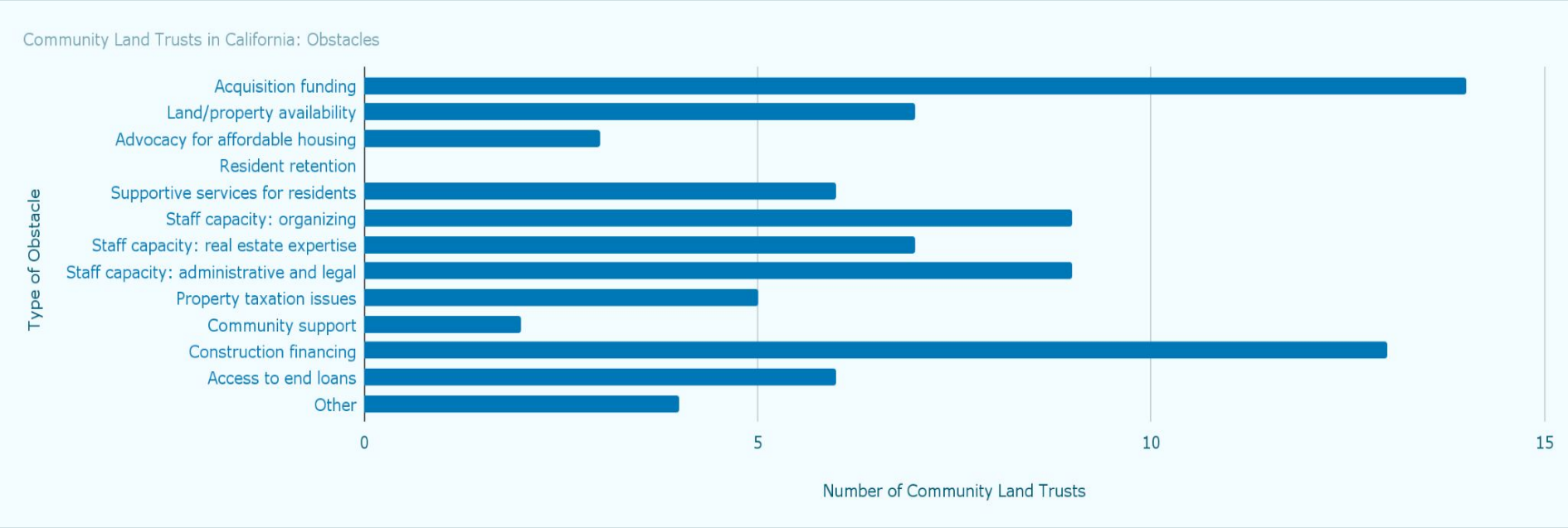
Organizational Survey Findings: Resident Waitlist

3,024 total residents living in CLTs

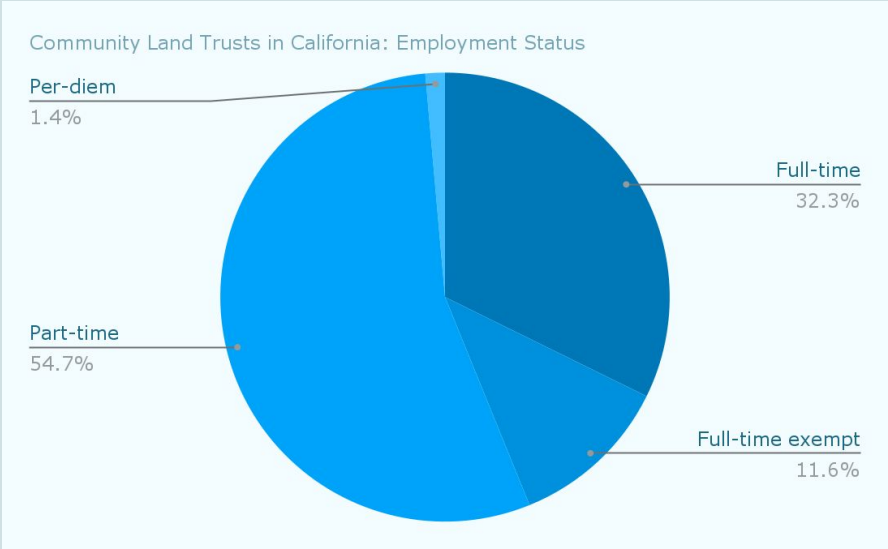
53% of CLTs have a waitlist

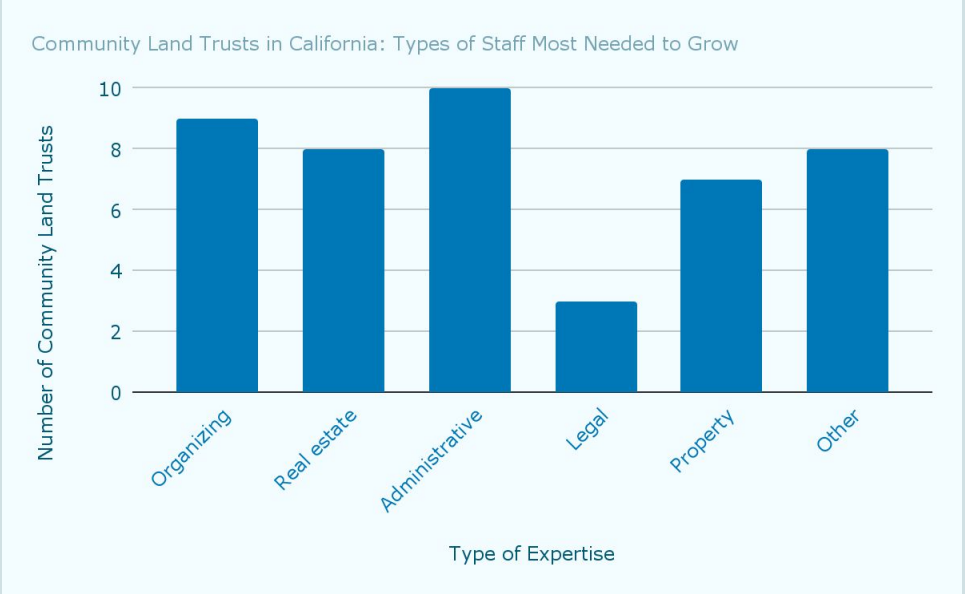
7,844 total applicants on the waitlist

Organizational Survey Findings: Common Obstacles



Organizational Survey Findings: Staffing





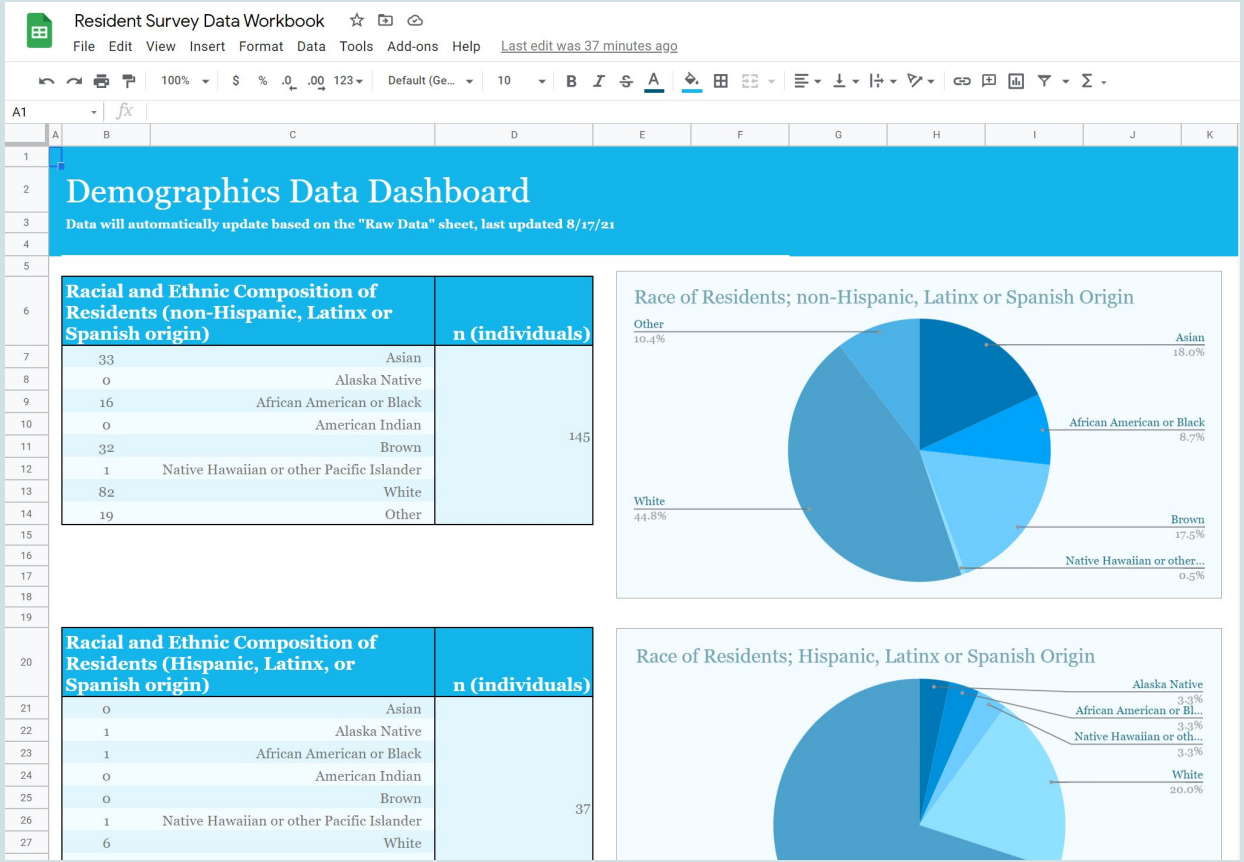
Organizational Survey Findings: CLT Priorities

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

*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 Data Workbook

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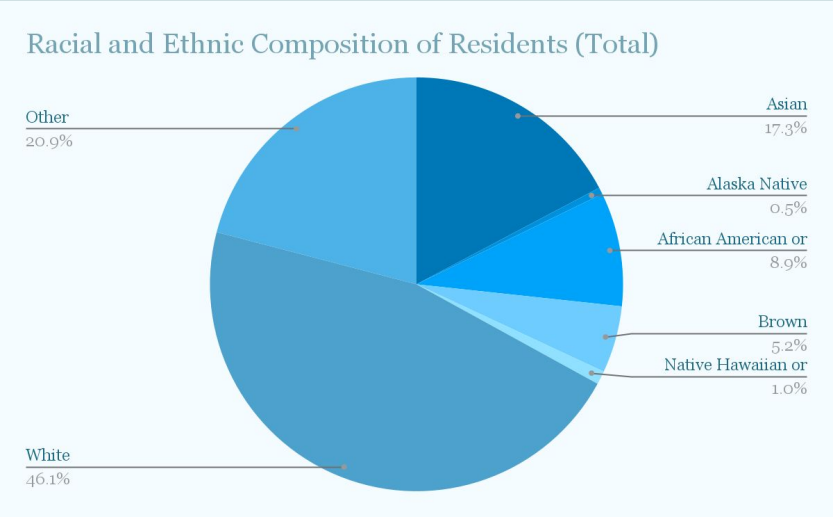
Demographics Data Dashboard

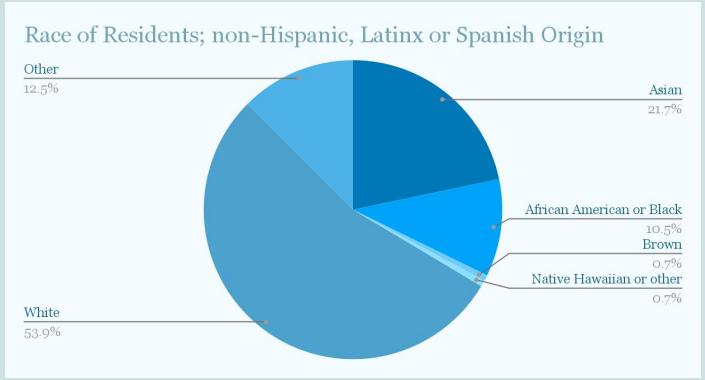
Data will automatically update based on the "Raw Data" sheet, last updated 8/17/21

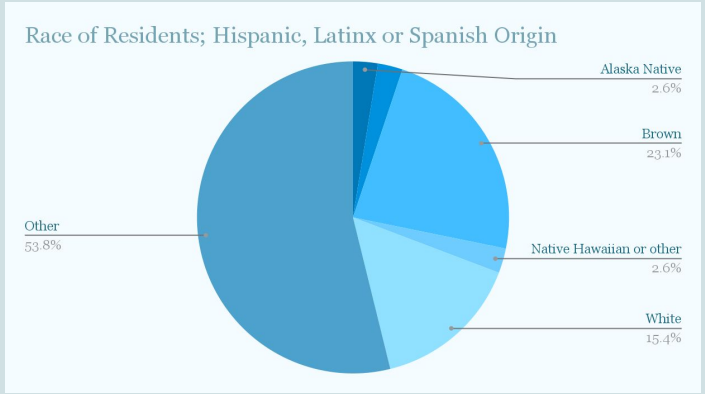
Racial and Ethnic Composition of Residents (non-Hispanic, Latinx or Spanish origin)		n (individuals)
33	Asian	145
0	Alaska Native	
16	African American or Black	
0	American Indian	
32	Brown	
1	Native Hawaiian or other Pacific Islander	
82	White	
19	Other	

Racial and Ethnic Composition of Residents (Hispanic, Latinx, or Spanish origin)		n (individuals)
0	Asian	37
1	Alaska Native	
1	African American or Black	
0	American Indian	
0	Brown	
1	Native Hawaiian or other Pacific Islander	
6	White	

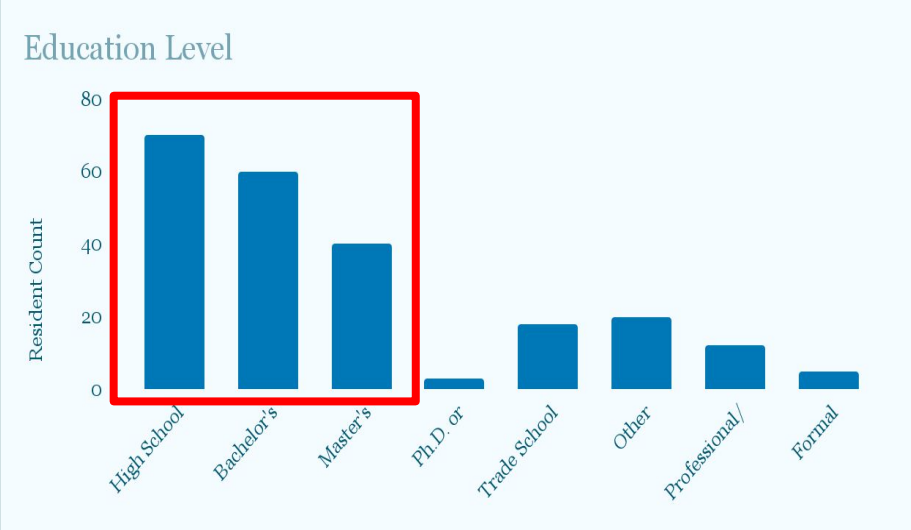
Resident Survey Findings: Demographics







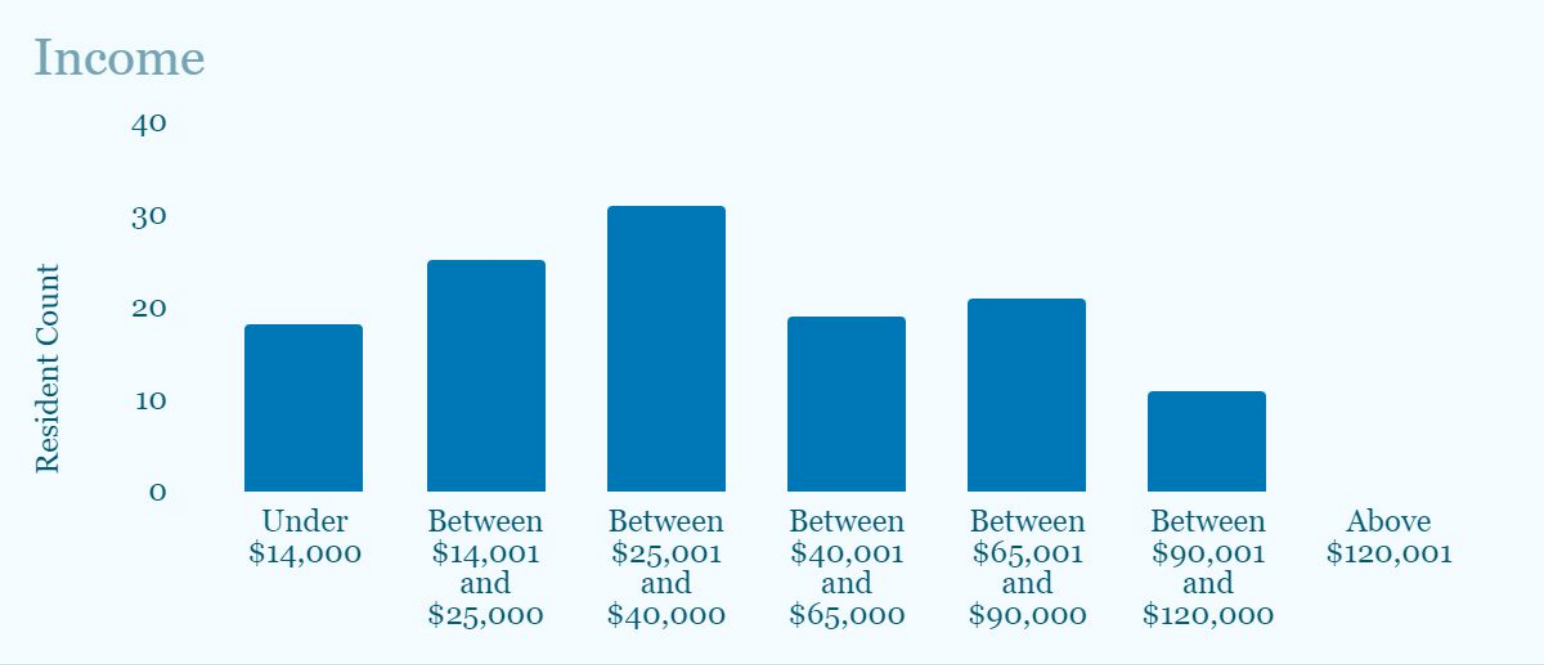
Resident Survey Findings: Demographics



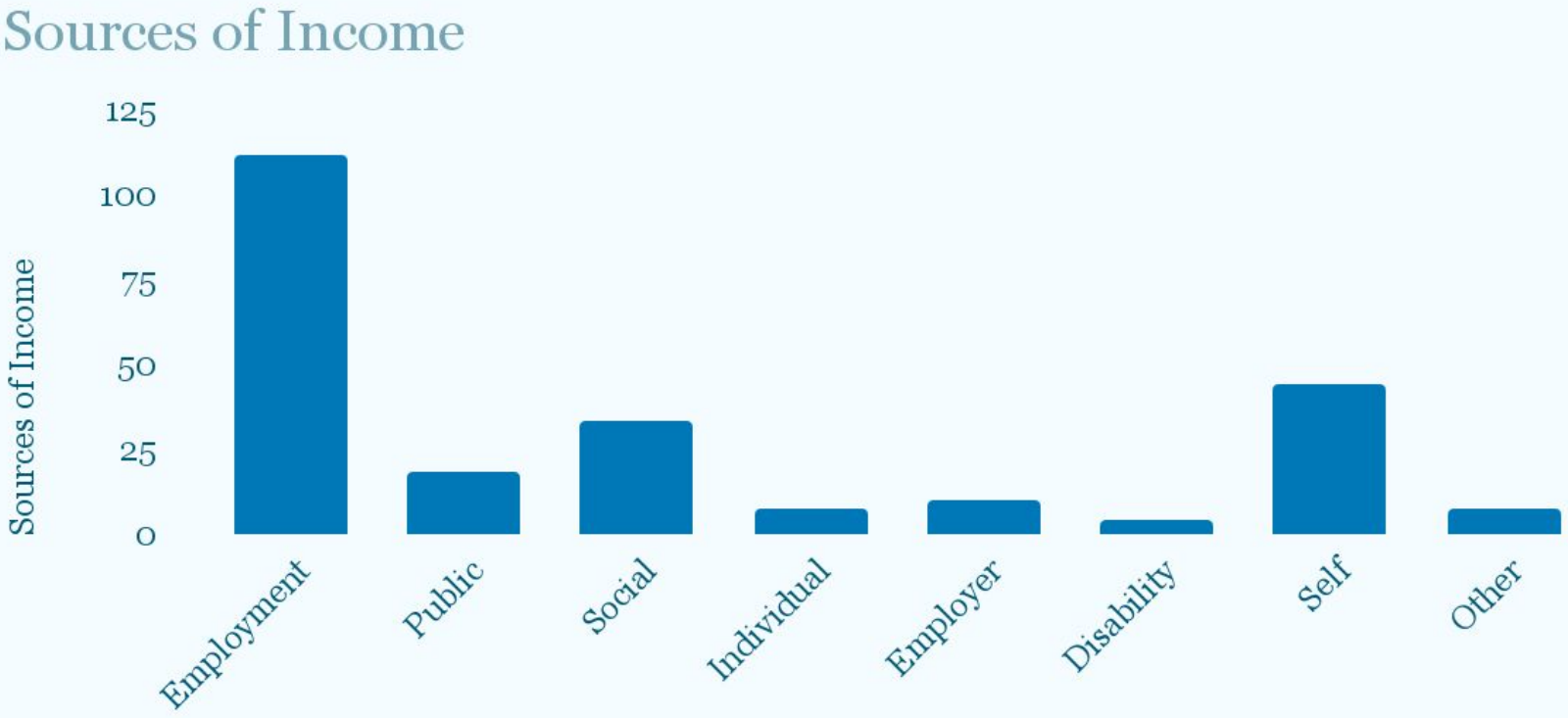
Household Data		n (households)
1.9	adults in each household	121
0.5	children in each household	102
2.5	average household size	121
32.5%	of households have children	102

Demographics		n (individuals)
48	average age of adults	
47	median age of adults	176
23.4%	of residents have a disability	102

Resident Survey Findings: Resident Financial



Resident Survey Findings: Financial



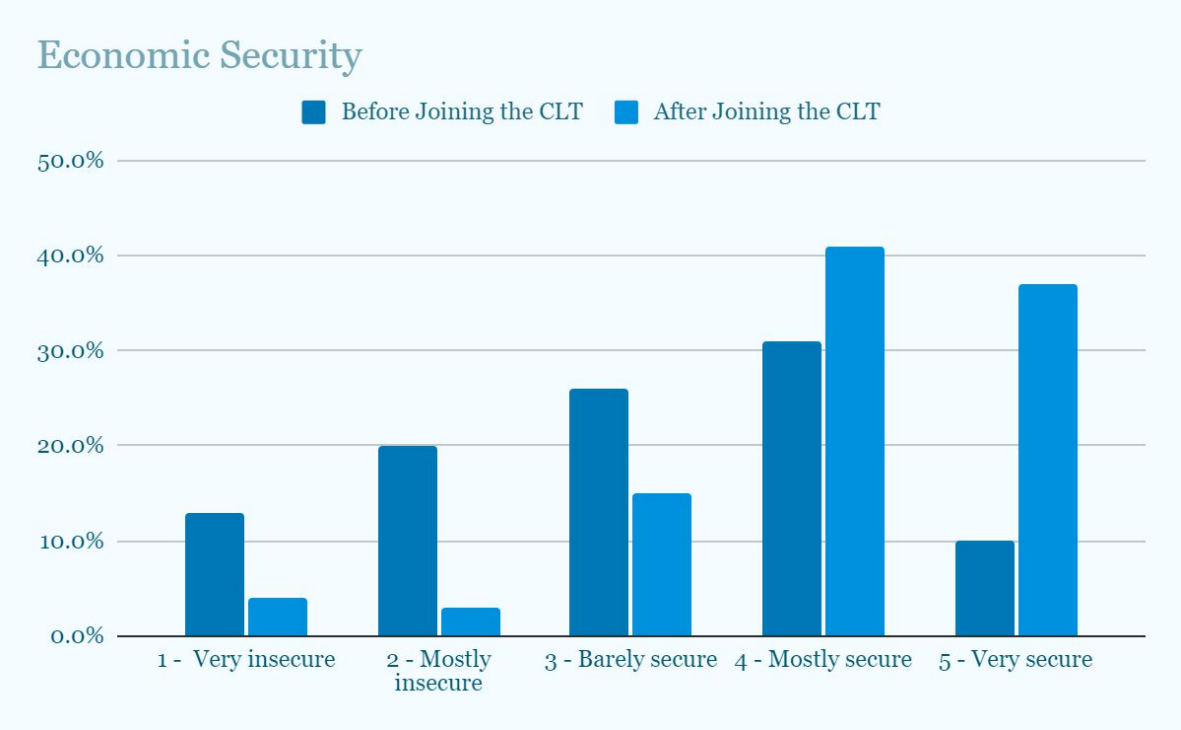
Household Spending Per Month

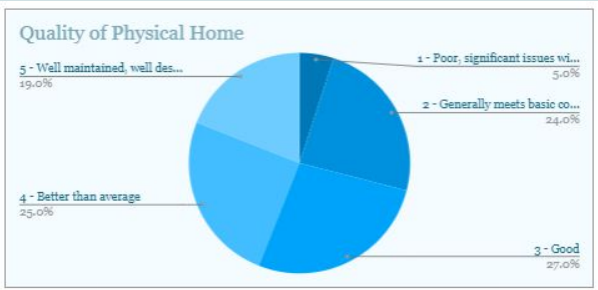
Household Spending Per Month		n
$1,408	average spending on housing	99
$896	average spending on childcare (if any)	16
$601	average spending on food	103
$172	average spending on utilities	102
36.9%	of residents send financial support to someone outside of their household	104

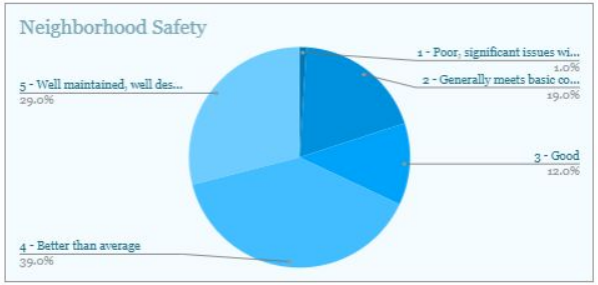
CA Averages

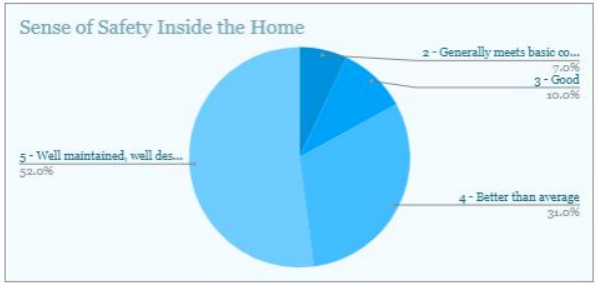
- **$1568 (including utilities)**
- **$1300**
- **$733**

Housing Quality & Economic Security







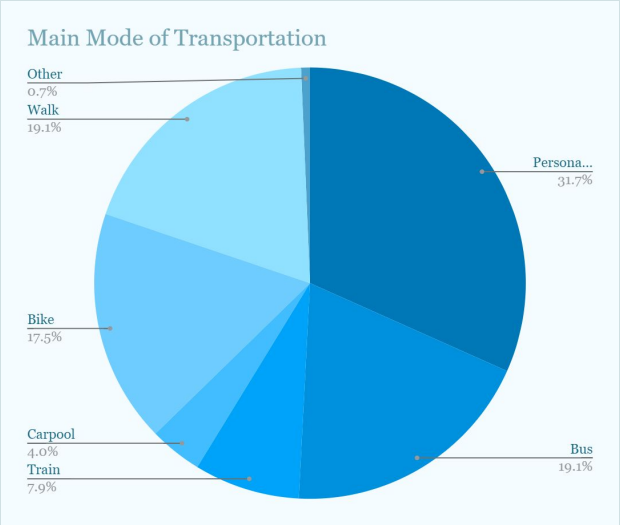


Average Ratings		n
3.3	average rating out of 5: quality of physical home	100
3.8	average rating out of 5: neighborhood safety	100
4.3	average rating out of 5: inside of home safety	100

Resident Survey Findings: Transportation

Proximity to Amenities	Work	Hospital	Doctor's Office	Post Office	Childcare	Grocery Store	Outdoor Recreational Activities	Transit Hub
Less than 10 Minutes	29	31	29	79	13	73	59	62
10-20 Minutes	33	47	47	39	12	38	35	36
20-30 Minutes	14	21	30	7	7	6	12	10
30-40 Minutes	8	7	6	1	3	0	7	1
40+ minutes	2	12	7	0	1	3	2	5

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



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

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Jen Collins
Leo Goldberg
Oscar Monge
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Lluvia Cardenas (Spanish)
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Francisco J. Meza (Spanish)

Research Project Funder

Chan Zuckerberg Initiative

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

All CLT Resident Survey Respondents