

CACLTN Business and Project Planning Technical Assistance Program Overview

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A CLT may find this program helpful when...

- *Creating a working business plan*
- *Revising an organizational budget*
- *Projecting staffing and project needs*

The Program

It's an exciting time for the community land trust (CLT) movement in California. Many organizations or groups of neighbors are exploring the creation of a new CLT to serve their community. Many established CLTs are growing and taking on new projects.

The CA Community Land Trust Network (CACLTN)'s Business and Project Planning Technical Assistance Program offers CLTs access to expert consultants for up to 10 hours of consultation and follow-up. This program may assist CLTs in the following areas: covering:

- compiling financial records (3yrs audited financials, finance statements, tax returns)
- compiling & refining project specifics (development budgets & proformas, securing cost estimates)
- acquisition considerations & processes (purchase terms & process, e.g. securing appraisals)
- operational capacity (business planning, repayment strategy, staffing)
- governance (Board process for authorizing transactions, taking on debt or subsidy, etc.)

- collateral issues (property, other assets, e.g grants, receivables, or UCC liens) as well as guarantees
- project feasibility assessment, including pre development & acquisition analysis

Who is Eligible?

The program is available to [current dues-paying member organizations](#) of the CACLTN. If you are unsure about whether your organization is an active member, please reach out to Shirley Kawafuchi at shirley@cacltnetwork.org.

What does the Business and Project Planning Technical Assistance look like?

All TA requests must come in through the TA form and be submitted by staff, a board member, or main representative of the CLT/organization.

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

Initial assistance provided through this program will consist of an introductory meeting, usually online or by phone with the assigned consultant. The total of ten hours of assistance may be rounded out by additional meetings or by the time the consultant spends on drafting or reviewing documents.

All requests are valid for a 4 month period. After 4 months pass, requests must be re-submitted and re-approved via the TA form. CACLTN follows up with organizations whose requests are lapsing.

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

[Land & Liberty – Francis McIlveen](#)

Until 2022, 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 continues to serve 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.

Francis McIlveen specializes in:

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, and 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 expenses.

CTY Housing specializes in:

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

I'm ready! How do I sign up?

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

<https://forms.gle/DTAWfvb15nyrvpFz9>

Questions?

Please contact Shirley Kawafuchi, CACLTN Program Manager, at shirley@cacitnetwork.org or (510) 244-3784.