

CLT Implementation Roles & Responsibilities

Ongoing responsibilities after start-up

Roles & Responsibilities	Executive Director	Other Staff	Board	Committee	Consultant or Contractor	Partner Agency	Other
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							
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 new board members							
Orient new board members							
Interview and hire executive director							
Conduct annual performance evaluation for executive director							
Conduct regular organizational performance evaluation							
Develop and evaluate organizational operating policies (sexual harassment, financial; personnel; etc.)							
Human Resources							
Develop personnel policy and other HR policies							
Develop job description for each staff member							
Manage payroll							
Coordinate benefits							
Interview and hire Executive Director							
Interview and hire staff (other than the ED)							
Conduct annual performance evaluation of Executive Director							
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							
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, website, special events, etc.)							
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							
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							
Legal and Financial							
Develop project legal documents (ground lease, condo docs, etc.)							
Develop and execute homebuyer disclosure documents, including Letter of Acknowledgement							
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 Leaseholders							
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 lessee payment of real estate taxes and insurance							
Monitor lessee compliance with insurance coverage requirements							
Monitor and enforce all provisions in 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 (and, potentially, for existing lessees)							
Determine and implement insurance limits on lessees' ground lease anniversary dates							
Determine and implement ground lease fees on lessees' ground lease anniversary dates							
Explore use of CLT "framework" for other types of residential uses (e.g., homebuyer-initiated program; mixed-income development) and non-residential uses (e.g., commercial; green space preservation) in other parts of service area							
Participate in statewide, regional and national CLT initiatives - to share information; broaden awareness and support for the CLT model; promote best practices; advocate for public policy initiatives; etc.							
Implement and maintain data collections system to gather/synthesize data needed to document effectiveness of CLT and CLT model							