

Menu of Technical Assistance Incubation Services

Organizational Certification Technical Assistance Packages ¹				
Technical Assistance and Incubation (TAI) Cohort Activities	Existing Private Entity, Self-Service	New, Related Private Entity; Existing Entity, Substantial TA	New, Unrelated Entity or Local Government Establishment, Self-Service	New, Unrelated Entity or Local Government Establishment, Substantial TA
General Project Management				
Work with staff to determine the best suited track to legally and operationally establish a CLT	X	X	X	X
Work with staff to begin the creation or updating of organizational strategic plan, financial sustainability plan and resource mapping that considers long term operations, development and stewardship	X	X	X	X
Articles of Incorporation - FHC will provide:				
Sample language or full document as appropriate	X	X	X	X
One time feedback and recommendations purposed to effectuation of a CLT program. reviewed with staff and the organization's counsel	X	Included Below	X	Included Below
Revisions or draft one set of Articles that establishes the desired objectives and specifications of incorporators or Board; reviewed with staff and the organization's counsel	-	X	-	X
Support CLT Board in filing for tax exempt status	-	-	X	X
Bylaws - FHC will provide:				
Sample language or full document as appropriate	X	X	X	X
One time feedback and recommendations purposed to effectuation of a CLT program; reviewed with staff and the organization's counsel	X	Included Below	X	Included Below
Revisions or drafts one set of Bylaws that establishes the desired objectives and specifications of incorporators or Board; reviewed with staff and the organization's counsel	-	X	-	X
Assist with Board Formation including providing template Board Invitation Letter and Application	-	-	X	X
Guide assembly of Board of Directors, elect officers and organize recurring meetings	-	-	-	X
Resale Formula - FHC will provide:				
Evaluation of program objectives	X	X	X	X
One resale affordability analysis based on anticipated program policies and procedures and present to staff	X	Included Below	X	Included Below
Aid in selection of resale formula suited to acheive objectives	X	Included Below	X	Included Below
One resale formula designed to best meet the organization's objectives	-	X	-	X
One evaluation of potential resources and capital stack for unit development including benefits and challenges of State Housing Initiative Partnership, Tax Increment Financing, Dept. of HUD Grants, Publicly Owned Land on permanent affordability	-	-	X	X
Resale Procedure Development - FHC will provide:				
Sample procedure on its handling of the resale formula and overall resale process as guide for development	X	X	X	X
One time feedback and recommendations on procedure drafted by participant staff	X	Included Below	X	Included Below
FHC drafts one set of resale procedures that best meets the organization's intended approach and specifications	-	X	-	X
Ground Lease & Memorandum (Owner) - FHC will provide:				
A model ground lease and memorandum of ground lease as guide for document development	X	X	X	X
Feedback and recommendations on each section of the staff drafted CLT ground lease using the model template	X	Included Below	X	Included Below
Feedback and recommendations on the staff drafted memorandum of ground lease template	X	Included Below	X	Included Below
Feedback and recommendations on the staff drafted template ground lease riders	X	Included Below	X	Included Below
A revised sample template ground lease, memorandum and riders manual tailored to the organization's previously established objectives	-	X	-	X

Menu of Technical Assistance Incubation Services

	Existing, Self-Service	Existing, Substantial TA	New, or LG Establishment, Self-Service	New, or LG Establishment, Substantial TA
Homebuyer Education Program - FHC will provide:				
A sample education manual	X	X	X	X
Feedback and recommendations on program materials compiled by staff purposed to tailor manual and implement best practices	X	Included Below	X	Included Below
Guidance on determining establishment of an internal program or external partnership to offer Homebuyer Education specific to CLT ownership	X	Included Below	X	Included Below
A revised education manual tailored to the organization's approach formulating an instruction ready package	-	X	-	X
CLT General Procedure Development - FHC will provide:				
Sample procedure manual as guide	X	X	X	X
One time feedback and recommendations on procedure manual previously revised or drafted by staff to incorporate CLT/SE best practices	X	Included Below	X	Included Below
One time feedback and recommendations in the revision of subsidy and incentive policy to accommodate and/or include a preference for the CLT including revision of SHIP LHAP (Local Housing Assistance Plan), incorporation of resale option for HOME Funds, and preference in the disposition of publicly owned properties	-	-	X	Included Below
One set of proposed revisions of subsidy and incentive policy detailed above	-	-	X	X
One revised sample procedure manual tailored to the organization's intended approach formulating an instruction ready package	-	X	-	X
One orientation to the community land trust model that addresses key elements of CLT Bylaws, resale formula design, key elements of Ground Lease and related documents (memorandum, riders, etc.), property Tax Implications for homeownership and rental approaches	-	-	-	X
Local Property Appraiser - FHC will provide:				
A slide deck that the organization can present to Property Appraiser	X	X	X	X
One live virtual presentation on real property valuation, assessments and taxes related to CLT operations to the County Property Appraiser's office	-	X	-	X
Organizational & Program Certification - FHC will provide:				
Final steps for each participating organization to meet the Florida Community Land Trust Institute's Training and Organizational Certification program requirements including, but not limited to, submission of documents, completion of organizational self-assessment, financial management and having varied CLT revenue sources	X	X	X	X
A self assessment and review of remaining best practices and organizational evaluation germane to certification	X	X	X	X
Review of all best practices germane to certification	X	X	X	X
Direction on the initial application process for Fannie Mae's shared equity ground lease certification	-	X	-	X
TAI Package Cost ^{2,3,4}	\$7,700	\$13,700	\$27,000	\$47,000

If you'd like to get bulk Basic Individual Training enrollment discount information or create a custom package using the above services and/or want to include additional work (such as the items listed below), contact Matthew Wyman, wyman@flhousing.org

The following TA can be incorporated into any of the above packages a la carte:

- Non Homeownership Ground Lease Development and Fee Calculation
- Incorporating and aligning affordability provisions into Condo and/or HOA documents
- Developing an advertisement to procure, evaluate and identify an organization to serve as CLT
- Drafting a business plan and budget that implements strategies for long-term sustainability
- Personnel activities such as establishing job descriptions that support a successful operation
- Marketing plan preparation
- Lead the administrative and operational activities of the CLT including compilation of a development team (contract, architect, entitlements, etc.) that will endeavor to facilitate the production and sale of homeownership unit(s).
- Procurement of an organization to serve as a CLT or shared equity partner with a local government. Subsequently, work to fully establish a certified operation with the selected entity and LG can continue through an applicable package shown above.

Notes:

- 1- Executive Director or Senior Staff (All Staff Welcome), Board Chair or Designee (Entire Board Welcome) are REQUIRED to successfully complete the BIT
- 2 - Payment due at enrollment to reserve virtual seat; One enrollment included in Technical Assistance, when booked as a TAI package prior to start of BIT
- 3 - Promotional Discounts Include: Referrals of individuals and organizations and bulk enrollment of more than 5 BIT participants from the same organizations
- 4 - TA and Incubation Package payment schedule: 33% at enrollment to reserve spot and obtain incentive; 33% at TA & Incubation cohort start which follows completion of the Basic Individual Training Cohort; and 33% at TA & Incubation