



**Burlington Associates
in Community Development
Dev Goetschius, Partner**

CITY OF FORT BRAGG

REQUEST FOR PROPOSAL

Feasibility Study and Establishment of a Community Land Trust Serving the City of Fort Bragg

Respectfully Submitted to:

City of Fort Bragg

June Lemos, CMC, City Clerk

July 28, 2020

City of Fort Bragg
June Lemos, CMC, City Clerk
416 North Franklin Street Fort Bragg
CA 95437
jlemos@fortbragg.com

July 28, 2020


Dear Ms. Lemos,

Thank you for the opportunity to bid on participating to support and deliver the goals related to the Feasibility Study and Establishment of a Community Land Trust Serving the City of Fort Bragg as outlined in the Request for Proposal.

For the last 17 years I have served as the founding Executive Director of Housing Land Trust of Sonoma County, a nonprofit dedicated to creating permanently affordable homeownership opportunities for working families in Sonoma County. My experience and expertise expands into the Bay Area, the State and on the national platform in the area of housing, with a focus on the Community Land Trust Model as a tool to achieve secure, affordable and stable housing in perpetuity.

I am writing to you as a Partner in the national consulting firm Burlington Associates in Community Development, which I joined in 2010. My role as a consultant has been to establish Community Land Trusts in various cities in CA; this work involves designing all aspects of the homeownership program educating stakeholders in the community, from City Council Members to developer partners to local employers to understand the benefit of the model for homeowners and as a community asset.

My best,

A handwritten signature in cursive script that reads "Devika Goetschius". The signature is written in black ink on a light-colored background.

Devika Goetschius

A. Firm Description

Mission

We are a national consulting cooperative founded in 1993 to support community land trusts (CLTs) and other shared equity homeownership strategies. Operating out of offices in Burlington VT, St. Joseph MN, Boston MA, and Petaluma CA, we specialize in the development and evaluations of public policies and private initiatives that:

- Enhance security of tenure for lower-income households by expanding access to shared equity homeownership;
- Protect the community's investment in affordable housing, transit-oriented development, urban agriculture, and neighborhood commercial districts by preventing the removal of public or private subsidies;
- Ensure the long-term stewardship of housing and other community assets – preserving affordability, promoting

B. Qualifications in Housing and Property Related Services

Burlington Associates in Community Development, LLC is a national consulting cooperative established in 1993. The six partners of Burlington Associates operate out of offices in Burlington VT, Boston MA, St. Joseph MN, and Petaluma CA.

Burlington Associates has worked in a diverse array of inner-city neighborhoods, suburban towns, and rural communities, assisting nonprofit developers of affordable housing, municipal governments, state agencies, and community development financial institutions throughout the USA, Puerto Rico, Canada, Australia, Belgium, and England.

Burlington Associates is the premier provider of technical assistance to **community land trusts** (CLTs) in the United States. Our partners have worked with over 100 CLTs, assisting many in getting started; assisting many others with long-term planning for the stewardship of their portfolios and the sustainability of their operations. The "CLT Resource Center," which Burlington Associates added to its website in 2005, has become the first place to which practitioners and policymakers often turn when seeking training guides, legal documents, program evaluations, policy research, and other technical information about CLTs. Most of these materials can be downloaded free of charge.

B. Relevant Experience

Listed here is a representative sample of clients who have looked to Burlington Associates for technical assistance in:

- Establishing a Community Land Trust to meet the housing need for very low to moderate Income households
- Assessing the feasibility of proposed housing projects and preparing development *pro forma*;
- Negotiating and drafting funding agreements and development agreements;
or
- Educating private lenders, public funders, and property appraisers about various models of resale-restricted, owner-occupied housing.

Athens Land Trust (Athens, GA) Assistance with CLT ground lease development, project financing and permanent mortgage financing for CLT homebuyers.

Central Minnesota Housing Partnership (St. Cloud, MN) Assistance to CMHP and the Central Minnesota Community Land Trust, a CMHP subsidiary, in designing a 30 single-family for-sale homes in an award-winning, mixed-income, Traditional Neighborhood Design community known as “Heritage Greens.”

Greater Iowa City Housing Fellowship (Iowa City, IA) Assistance with educating appraisers about appraisal methodologies for valuing resale-restricted, owner-occupied housing on leased land.

North Missoula CDC (Missoula, MT) Training of new staff in project development fundamentals; assistance with identifying and obtaining appropriate project financing resources; assistance with design and implementation of CLT condominium program.

Sawmill Community Land Trust (Albuquerque, NM) Planning and preparation of development pro formas for the residential and commercial redevelopment of a 27-acre inner-city site previously owned by the City of Albuquerque. Assistance in developing a marketing plan for the sale of Sawmill’s first resale-restricted, owner-occupied housing.

Thistle Community Housing (Boulder, CO) Assistance in developing a mixed-income 198-unit homeownership project in Longmont, Colorado, divided among two condo associations and a co-housing regime. Assistance resolving ground lease and resale formula issues and negotiating the sale of CLT mortgages to Fannie Mae.

Listed here is a representative sample of clients who have looked to Burlington Associates for assistance in:

- Creating a neighborhood-based, city-wide, or region-wide community land trust; or

- Creating a “central server” or similar regional system to support the development and stewardship of scattered-site resale-restricted, owner-occupied housing.

Atlanta Land Trust Collaborative (Atlanta, GA) Assistance to the Atlanta Beltline Partnership in creating the blueprint for a “central server” that will seed and support neighborhood-based community land trusts along the path of the Atlanta Beltline, currently the largest urban redevelopment project in the United States.

City of Chicago (Chicago, IL) Assistance to the City of Chicago’s Department of Housing in creating a municipally sponsored community land trust to preserve the affordability of publicly assisted, owner-occupied housing.

Community Home Trust (Carrboro, NC) Technical support for the efforts of three town governments and three community development corporations to establish a countywide community land trust, the Orange Community Housing and Land Trust. OCHLT was later renamed the Community Home Trust.

Crescent City Community Land Trust (New Orleans, LA) Assistance to community stakeholders in determining the most effective strategy for implementing a comprehensive community land trust strategy in New Orleans. Assistance in designing and implementing CCCLT ‘central server’ organization with three primary program areas: (1) residential; (2) commercial; and (3) vacant properties – with an overall goal of supporting neighborhood-based CLT stewardship.

Lexington-Fayette Urban County Government (Lexington, KY) Assistance to LFUCG and the Kentucky Transportation Cabinet to develop a community land trust to preserve the newly developed Southend Park Urban Village neighborhood, a mix of 100+ rental and for-sale homes, institutional and commercial properties. This neighborhood is being developed as part of a state-funded highway extension project in Lexington, Kentucky.

Pima County Community Land Trust (Tucson, AZ) Assistance with creation of a community land trust to serve the City of Tucson and Pima County, with a primary focus on preserving the affordability and condition of 70+ homes purchased and rehabbed with NSP funds, while providing assistance and support to the low-income households that own these homes. Assistance from Burlington Associates has included assessing CLT feasibility, developing a business plan, designing programs, and strategic planning.

C. Key Personnel Qualifications

Key Person: Devika Goetschius

Relationship to Bidder: Partner at Burlington Associates in Community Development, LLP

Job Title: Partner Years: 9

The role that Dev Goetschius will play in connection with the core service categories in the bid qualifying for in this RFP is to work directly with the City's Housing & Economic Development Coordinator to deliver the scope of work as described in Section E of this RFP. The CLT is a working model I have studied and implemented to meet the stated objectives. A key component of this model is the partnership with public, private and nonprofit entities to open doors – we combine political will, expertise on the ground and a mission driven organization to deliver services that lessen the burden of government while stewarding community assets for the public benefit and delivering stewardship to the individuals we serve, creating affordable, secure and safe housing. We are addressing the fact that we have a finite resource which is land, we also have finite dollars to invest, the Community Land Trust model takes land off the speculative market and puts it in trust so that it can only be used for housing a targeted population that is underserved and priced out of the private market. In addition to that, the resale formula in the ground lease ensures the home remains as affordable at initial sale as it does at subsequent sales, keeping the home affordable in perpetuity. In homeownership one is stabilized and can build equity that helps one transition into the market place with a nest egg for a down payment, it is an opportunity to create personal wealth for the first time family history, to have an option to pass the home down to one's children, who may also be priced out of the private market. I have experience in working with infill, maximizing underutilized land and working with planners and engineers to envision highest and best use housing in transit corridors, changing density where it will yield more affordable housing on publicly owned sites. Progressive policies and programs are necessary to codify any successful pilot programs we come up with in this process; I have a track record of successful partnership with Sonoma County, the State and with Fannie Mae to bring about policy changes that uses community land trust model for homeownership to keep homes affordable in perpetuity; we have AB 2818 and SB 196 that make the cost of homeownership more affordable by tying the property tax to the affordable sales price. Increasing the housing supply for our underserved population is insured when we preserve and recycle our subsidy with every client served. My role is to put the experience of evaluating if a CLT is a good fit for the housing needs of the City of Fort Bragg and if so, then to establish a working CLT homeownership program implementing the model.

In addition to Dev Goetschius, Partners John Davis and Michael Brown will assist as needed as all Partners collaborate in the firm to bring most knowledge to serve our client and meet the standards of our contract.

Education and relevant experience, certifications, and/or merits:

Devika Goetschius, Partner, Burlington Associates. Experienced developer and operator of nonprofit community organization programs including community land trust and after-school care programs. Executive Director for 28 years and manager of program operations with multiple sites

and economically –diverse clientele. Skilled at government and private grant acquisition and administration, program development, and personnel management. Talented presenter and community outreach representative. Credentialed Teacher of the Handicapped with an emphasis in children with serious emotional disturbance (SED) and learning disabilities. Multilingual, including fluent Spanish.

Boards:

National Community Land Trust Network 2006-2012; founding board member past President 2010-2011

Committee on the Shelterless (COTS) 2005-2012 Vice President & Treasurer

Housing Land Trust of Sonoma County, Founding Executive Director and Board Member 2003-current

CA CLT Network, Founder, Vice President February 2018-2019

CLT Center Advisory Board 2018-current

Gen H, Founding Board Member 2019

John Emmeus Davis, Partner, was one of the founders of Burlington Associates in 1993. He has over 30 years experience providing technical assistance to community land trusts and other nonprofit community development organizations throughout the United States. He previously worked as a community organizer and nonprofit executive director in East Tennessee and served as Housing Director and Enterprise Community Coordinator for the City of Burlington, Vermont. He has taught housing policy and neighborhood planning at New Hampshire College and MIT. He was a co-founder of the National CLT Academy and served from 2009 to 2012 as the Academy's Dean. His publications include *Contested Ground: Collective Action and the Urban Neighborhood*, *The Affordable City: Toward a Third Sector Housing Policy*, *Shared Equity Homeownership: The Changing Landscape of Resale-restricted, Owner-occupied Housing*, and *The Community Land Trust Handbook*.

Michael Brown, Partner, has over 30 years of experience in community development, housing development, advocacy, and organizational development – particularly with community land trusts and other shared-equity strategies. Prior to becoming a Partner in Burlington Associates, he served as the first Executive Director of the Woodland Community Land Trust in Clairfield, Tennessee, one of the first CLTs operating in the United States, the Associate Director of the Institute for Community Economics and the founding Executive Director of the Housing Coalition in St. Cloud, Minnesota. In the past 15 years, he has logged lots of miles on the road, providing on-site technical assistance to establish and build the capacity of new and existing CLTs – services ranging from feasibility analysis and business planning to program implementation and evaluation – and to build support for CLTs from the public and private sectors.

D. References

Duane Bay, Executive Director

EPA CAN DO

dbay@epacando.org

(650) 804-0932

Former Executive Director of San Mateo County Department of Housing and Housing Authority as Burlington Associate client & current client.

Matthew Grundy, CEO

Habitat for Humanity Greater Fresno Area

Founding Director Central California Land Trust

(559)761-0825

matthew@habitatfresno.org

Founded the CLT in Fresno to partner with the City of Fresno, current client.

Tim Gallagher, President

Homes for Generations of Ventura County

(805)276-2110

time@the2020network.com

Recently established a CLT in Ventura County to partner with the City to meet the affordable housing goals, keeping homes affordable in perpetuity, current client.

Additional references available upon request.

E. Scope of Work

Part 1: Burlington Associates shall provide technical advice and assistance to the City of Fort Bragg in developing a replicable framework for implementation of the Community Land Trust program. Specific tasks include those listed below and with additional tasks as mutually agreed upon on an ongoing basis. Burlington Associates will work directly with the City's Housing & Economic Development Coordinator by providing professional services and technical assistance to assess the feasibility of establishing and operating a municipally-sponsored CLT serving the City of Fort Bragg. Burlington Associates shall deliver the following:

- Determine short- and mid-term goals and develop a work plan.
- Develop recommendations for an organizational model for the City of Fort Bragg.
- Provide an introduction to CLTs to City Council and community at public meeting.

Scope of Services to be Performed:

Assist the City of Fort Bragg with evaluation of its business plan and related program planning including identifying and evaluating the CLT model, partnering with the nonprofit thus establishing a safety net for the future, weighing benefits of establishing a CLT, creating a permanent legacy and exploring the impact on the CLT regarding staffing/outsourcing land lease administration.

Facilitate discussion on homeownership models to help Staff and City Council members understand the long-term impact of choices in initial project financing and resale formulas. Demonstrate how the resale formula tied to the AMI index works in a CLT unit.

Assist in educating key stakeholders about the land trust/ground lease model and common practices of other Housing Land Trusts.

Part 2: Work directly with the City's Housing & Economic Development Coordinator by providing professional services and technical assistance to develop an organizational strategy and pilot project to be implemented by a municipally-sponsored CLT in the City of Fort Bragg.

- Develop an Organizational Structure for a CLT serving the City of Fort Bragg
- Explore financing strategies
- Develop pilot project for implementation of CLT

Burlington Associates will assist in educating key stakeholders on the land trust/ground lease model and common practices of other Community Land Trusts and will help educate CLT staff and board regarding:

- Subsidy retention, community wealth, personal wealth creation and recruiting & retaining the workforce, as UCs have done by employing the CLT model affecting city and county housing policy to support the CLT's mission.
- Provide Education of appraisers and title companies and lenders on CLT purchase transactions (off site at a date TBA).
- Design a First Time Homeownership Program with an emphasis on stewardship.
- Provide on-going consultation and assistance, to establish 501(c)3 and start up guidance including reviewing business plan, contracts with funders and strategic planning for the first 3 years of implementation of CLT model using the ground lease to ensure permanent affordability of units in program portfolio, unless this has already been completed.

Burlington Associates is excited to have the opportunity to serve to the City of Fort Bragg. The work we have done nationally and internationally translates well into any community that seeks to deliver housing that is safe, healthy and permanently affordable. The Community Land Trust model is effective and it focuses on two things: creating community wealth and creating personal wealth. Community wealth is created by setting aside land/units aside in perpetuity that serves a targeted AMI sale after sale, a one-time public investment to create an affordable unit is designed and in fact is a proven working model, to remain affordable forever and serves as a community asset. Personal wealth is created by allowing persons previously in precarious housing situations to have the opportunity to be in a permanently affordable home, the risk of eviction or high cost that will displace that household is significantly diminished by the implementation of the Community Land Trust model. The security of place is a vehicle to improved quality of life that has a long term impact of the success of a household. The Community Land Trust model centers on stewardship of home and people served: the staff are a resource to identify property, take it through entitlement in partnership with the developer and public partner, qualify households, deliver homebuyer education, secure financing and legal documents, all pre-housing. During the time the family is housed, the staff continue to deliver stewardship maintaining monthly contact, providing a network of support, linking the householders to needed services in the community and when the time comes, to transition from the home to repeat the process with the next household.

A local reference is the work we have done to assist in Sonoma County to establish Housing Land Trust of Sonoma County, which was a client of Burlington Associates in 2003 to establish a program to serve families through the Community Land Trust model. That nonprofit has since created permanently affordable homeownership opportunities for extremely low to moderate income families throughout Sonoma County in partnership with various developers, nonprofits, local cities and the county. All homes are stewarded by the staff and projects managed from concept to delivery of home through sale and resale. To date the organization has served 100 families, 16 resales where the homes have remained affordable to the same income level without additional subsidy, 30 units under construction and 82 in the planning stages and expanding to Napa County.

F. Budget

PART 1: Compensation for professional services provided by Burlington Associates shall be at the rate of two hundred fifty dollars (\$250.00) per hour, with a maximum of this contract time (For ONE YEAR for PART 1 – DATES TO BE DETERMINED) **not to exceed \$40,000**. Travel time is included in the professional hours billed, to a *maximum* of eight (8) hours per day.

PART 2: Compensation for professional services provided by Burlington Associates shall be at the rate of two hundred fifty dollars (\$250.00) per hour, with a maximum of this contract time (For ONE YEAR for PART 2 – DATES TO BE DETERMINED) **not to exceed \$40,000**. Travel time is included in the professional hours billed, to a *maximum* of eight (8) hours per day.

In addition to compensation for professional services, Burlington Associates will be reimbursed by at cost for documented expenses paid by Burlington Associates in carrying out the Scope of Work specified in Part 1 and then Part 2 of the herein, including: copying, postage, food, lodging, plane travel, and ground transportation. It is anticipated that the only expenses will be for on-site visits and will be included in the not to exceed annual contract. Approximate budget for a maximum of 3 site visits will not exceed \$1,500 per year, for Part 1 and for Part 2 respectively. Please see per trip budget for site visit below.

Burlington Associates will submit invoices identifying personnel and the time worked, the general service(s) that were performed, the total compensation being requested for time worked, and the reimbursable expenses that are due.

Anticipated Expenses for up to 3 on site meetings per year:

1. Mileage – as per the IRS rate from Petaluma, CA to Fort Bragg
268 miles Round Trip – 3 times per year at the most.
2. Hotel \$250.000 per night – 3 times per year at most
3. Food \$75 per day – 3 times per year at most

Approximate budget for a **maximum of 3 site visits will not exceed \$1,500 per year**, for Part 1 and for Part 2 respectively.

PER SITE VISIT BUDGET:

Travel	268 Miles RT @ .57 per mile	\$152.76
Lodging	1 night	\$250.00
Food	Per day	\$75.00
Total Expenses	Per Site Visit Total	\$477.76

Job Description of Personnel:

Devika Goetschius

Relationship to Bidder: Partner at Burlington Associates in Community Development, LLP

Job Title: Partner Years: 9

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In addition to Dev Goetschius, Partners John Davis and Michael Brown will assist as needed as all Partners collaborate in the firm to bring most knowledge to serve our client and meet the standards of our contract.

G. Work Schedule

Work Schedule:

Part 1

Start in August or September 2020, complete Part 1 Scope of Work by September 30, 2021.

Part 2

Start on October 1, 2021, complete Part 2 Scope of Work by September 30, 2022. The pilot program will be designed, the implementation and establishment of the CLT will be dependent on the outcome of Part 1 Scope of Work and the resources available to acquire land and fund a program in Part 2.

H. Insurance

Burlington Associates shall procure and maintain for the duration of the contract, insurance against claims for injuries to persons or damages to property that may arise from or in connection with the performance Page 3 of the work hereunder by the Consultant, his agents, representatives, employees or subcontracts as set forth in Section 5.0 of Exhibit A which is attached hereto and incorporated by reference herein.

Burlington Associates requests for reduction in the insurance: The contract requires a Workers Compensation policy which Burlington Associates does not have as we do not have any employees. For the Professional Liability/E&O policy the limits are \$1,000,000 per each claim and \$1,000,000 aggregate limit. The contract requires \$2,000,000/\$2,000,000. Please let us know if these limits would acceptable.

The RFP indicates that the cost of such insurance shall be included in the consultant's proposal. Burlington Associates pays approximately \$4,000 per year for Professional Liability. The insurance covers all of the Partners.

I. Consultant Agreement

The City's standard consultant services agreement is attached as Exhibit A of the RFP. Burlington Associates has reviewed the provisions of the City's standard consulting services agreement. We have a request for amendments around the Insurance Section that we addressed in the Insurance section of this Proposal under Section H, above.