Francis McIlveen

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Objective

To advance the movement for an equitable and participatory economy through the Community Land Trust model as a tool for local, community control of land-based resources.

Skills & Strengths

Finding or inventing creative solutions and structures to set up community- and resident-controlled land-based projects and programs for success; modifying mainstream (market-driven) real estate tools to work for community-control of the land; high-adaptability to various cultural contexts and focus on solutions that derive from the community's values.

Experience

Independent Consultant - Principal

Land + Liberty (Consulting), Alameda, CA

https://land-liberty.com/

2022 – Present

Current clients:

California Community Land Trust Network

Provide technical assistance to Network member CLTs across the state of California, covering areas of organizational structure/governance and sustainability, program and project feasibility analyses, guidance in areas such as securing sources of project funding, structuring CLT ownership (condo, SFH, coop etc) and rental stewardship programs (and specific projects), and technical issues particular to the CLT model.

Various established and emerging Community Land Trusts and other organizations (Northern, Central, and Southern California)

On-going and project-specific technical assistance including: program creation (such as a new model for permanently affordable homeownership using the CLT model with a tenancy-in-common ownership structure); co-creating organizational CLT resale policies; real estate development project consulting (such as project feasibility, structuring ownership models & subsidies); staff trainings; non-profit management issues; assistance in strategic planning.

Here to Stay (Chicago, IL)

In close collaboration with staff, designing & outlining an Age-in-Place / Anti-displacement program for vulnerable homeowners to convert their homes into

CLT ownership (to reduce escalating property taxes and to address deferred critical repairs). Designing the policies, procedures and guidelines, as well as, feasibility tools to assess applicants.

Past clients:

Boston Neighborhood Community Land Trust (Boston, MA)

In close collaboration with staff, researched and modeled a program outline for establishing a rent-to-own program for existing (and future) rental properties in portfolio to convert to resident ownership & control. With a particular emphasis on feasibility milestones, tenant support programing & trainings needed, and staff and partner resources needed to set up & manage program.

'Āina: Land and Community Stewardship Cohort (Hawai'i, archipelago-wide)

In partnership with Hawai'i Investment Ready and Weinberg Foundation, facilitated and designed a year-long cohort of 15 organizations throughout the Hawaiian archipelago comprised of CLTs, native Hawaiian cultural and agricultural organizations seeking to create collective ownership housing models rooted in Hawai'ian land, values, and traditions. Cohort work included designing, organizing & conducting (as subject matter expert) virtual and in-person workshops, and providing TA through office hours, coaching sessions and one-on-one meetings.

Real Estate Broker

Northern California Land Trust – Berkeley, CA NCLT – Community Realty Brokerage

2017 – Present

CalDRE # 02028716

- Designed and implemented the Community Realty Brokerage to provide specialized real estate representation for BMR properties, specialized CLT transactions, and open market transactions as revenue source for NCLT.
- To date, brokerage has closed over $11.2M in transactions, earning over $240K in commissions, a vital revenue stream for parent non-profit, NCLT.

Director of Operations & Real Estate Development (Most recent title)

Northern California Land Trust - Berkeley, CA - www.nclt.org

2003 – 2022

Technical Assistance/Consulting & Project Management

- Provided guidance & technical advice to project management team creating the Supportive Housing Community Land Alliance, a CLT for supportive housing, under a $1.5M Innovation grant from MHSA, through

Alameda County Behavioral Healthcare Services; provided high-level guidance in structuring acquisition/rehab strategy, affordability restriction formulas, best practices, etc. in setting up the new organization.

- Incubation of CLTs, including: provided technical assistance to the Vallejo Housing Justice Coalition (VHJC) to establish a Community Land Trust in Vallejo—a collaborative effort with the VHJC, Urban Habitat and the Bay Area Health Inequities Initiative (BARHII);
- technical assistance to transfer two homes into CLT model for a nascent CLT (PAHALI) in East Palo Alto;
- cultivated partnership with the People of Color Sustainable Housing Network (POCSHN), currently serving as fiscal sponsor.
- Co-created the Small Site Acquisition & Renovation Business Model and Policy Recommendations for SFCLT, the San Francisco Small Site Collaborative, and the Bay Area Consortium of CLTs (funded by a grant from Enterprise Community Partners).
- Worked closely with resident groups in coop and HOA formation process, including: incorporation process/legal structure, co-creating project pro-formas & feasibility analysis, analyzing eligibility for subsidy programs, researched, co-drafted and assembled foundational legal documents needed in process such as ground leases, CCR's, HOA budgets, Articles of incorporation, Bylaws, property management contracts etc.
- Managed and coordinated property acquisition and co-op/owner conversion processes, as well as sales/transfer of completed units/projects to residents.

Project Acquisition & Development

- As broker/buyer (principal), acquired 6 projects for NCLT (adding 30 units of permanently affordable housing to NCLT's existing stewardship program)—included project feasibility (outreach & meetings with residents), securing all sources of financing and subsidy (applications, to creating project budgets/pro-formas, to loan doc negotiations, to closings, a total of $14.8MM in subsidies & financing), full transaction process (as broker) and due diligence.

- Projects above included planned rehabs. Created initial project budgets & scopes/estimates for funding and subsidy sources.
- Oversaw small-site rehab projects (with rehab budgets ranging between $150K - $4.5M)

Asset & Organizational Management

- Oversaw adherence to affordability covenants (i.e. Land Leases);
- Oversaw physical & financial health of other assets (e.g. NCLT's 78 units of rental properties, and over 40 units of CLT ownership housing), including securing financing as needed (e.g. refinances) and available subsidies (such as annual property tax welfare exemptions), worked closely with

Property Manager to ensure timely maintenance & capital improvements & strategized for financing of same.
- Ensured compliance with NCLT's internal controls (review & approval of expenditures, payroll etc.);
- Hired auditors & assisted with annual audit.

Housing Program *(2003 – 2018)*

- Managed the flow of applicants for NCLT's Resident Ownership Program, including oversight of applicants' eligibility and readiness for purchase; arranged orientations of new applicants; designed, refined & implemented budgeting and credit counseling programs.
- Managed sales processes for CLT units including: selecting pool of qualified applicants from wait list; design and implemention of fair marketing program per federal and local guidelines; ranking and scoring of applicants for specific properties according to objective and blind criteria and present to NCLT Board of Directors for final selection;
- Guided homebuyers through purchase process.

Fundraising & Finance

- **Project Financing:** Secured $7.15M in financing for ten (new & existing) projects using a variety of sources & structures (commercial loans, seller financing, construction loans etc.)
- **Project subsidies:** Secured an additional $6.9M in non-LIHTC project subsidies (researched & applied for all available project development and other subsidy programs; including preparing RFP, grant, & loan applications).
- **Property Donations & Planned Giving**: Conducted outreach with potential property donors; conducted due diligence and managed acquisition/transfer processes and escrows; provided structure & language for planned giving documents. Followed up on post-donation issues for NCLT and donors.
- Created, funded and managed the **NCLT CalHome Downpayment Assistance Program**. Secured initial grants of $1.96M from the CalHome program to fund the program, which provides down-payment assistance loans to qualified homebuyers. Since then, the program has added an additional $4.5MM in grant funding.
- Worked closely with governmental and banking institutions to find creative solutions to fill subsidy gaps.

Policy

Spearheaded policy initiatives advancing the goals of NCLT and the broader Community Land Trust (CLT) movement on local and state levels, including:

- Acted as policy representative to California Community Land Trust Network Policy Committee, and the Bay Area Consortium of Community Land Trusts;
- Convened regional coalition meetings [People's Land & Housing Alliance] to strategize advocacy efforts for ordinances & implementation of Anti-Displacement policies at local levels (Berkeley, San Francisco & Oakland) such as acquisition/rehab funding programs and a tenant/housing-CBO right of first refusal for occupied apartment buildings (aka TOPA or Tenant Opportunity to Purchase Act).
- Represented the CLT model (through speaking engagements & drafting informational materials) for various venues targeting audiences as diverse as local & regional policy makers, institutional lenders, real estate professionals, and community activists & organizations.
- Advocated for incorporation of the CLT model & permanent affordability into local, regional, state and national level financial regulations and institutional lender policies and practices.

Disability Benefits Advocate

Homeless Action Center, Berkeley, CA

1998 – 2001

- Advocated for unhoused people with mental disabilities in their claims for public benefits (such as SSI, housing etc.); Assisted with various reform efforts to reduce barriers to access to these life-saving benefits.

Leadership

FIHPP Working Group Committee Member

California Community Land Trust Network (CACLTN)

2022 – 2024

Provided input/guidance (including feasibility analyses & advice) for State of California HCD's Foreclosure Intervention Housing Preservation Program (a $500M permanent subsidy program); On-going participation in preparations for program roll-out (and policy advocacy), including creation of TA program (under the FIHPP program).

Technical Committee Member

Regional Impact Council (RIC)

2020 – 2022

Provided input/guidance for permanently affordable housing solutions for the RIC's Regional Action Plan, a framework for concurrent investment in interim & permanent housing to reduce unsheltered homelessness in the Bay Area.

Incorporating/Founding Board Member (Secretary)

California Community Land Trust Network - www.cacltnetwork.org

2015 – 2018

Co-founder of the Network, provided crucial early organizing efforts to create network; initial fundraising to create organizational legal structure; incorporated the entity.

Core member of CACLTN Policy committee accomplishments:

- In 2019, got SB196 passed, which extends a development phase property tax exemption to CLT housing projects.
- Through 12 months of co-creative efforts, the Network got AB-2818 passed into law, which makes possible the equitable/fair property taxation of CLT homes.
- Co-drafted & researched policy position for the Network on Fannie Mae's & Freddie Mac's Underserved Market Plans (and the underlying FHFA's Duty-to-Serve rule) advocating for attention to permanent affordability in the CLT model.

Founding member & Policy advocate

Berkeley Anti-Displacement Campaign/Coalition

2016 – 2022

- In coalition with the East Bay Community Law Center, Bay Area CLT, Berkeley Tenants Union and Friends of Adeline, successfully got passed an ordinance creating the Small Sites Program, which funds acquisition of 'naturally occurring' affordable rental properties to stabilize rents and prevent displacement of long-term tenants via real estate speculators.
- Worked with Mayor's Office to draft a TOPA (Tenant Opportunity to Purchase Act) ordinance, to give tenants right of first refusal to purchase, should their homes be offered for sale.

Working Group Member

Bay Area Preservation Program (BAPP loan program) Working Group

2016 - 2018

Core member of 18-month process culminating in a $10M revolving loan fund (capitalized by MTC) to provide crucial gap financing for acquisition & rehab of existing affordable housing (e.g. due to rent control) at risk of loss due to gentrification pressures. Helped co- develop economic model, underwriting criteria and terms for loan program.

Founding Member

Bay Area Consortium of Community Land Trusts - www.bacclt.org

2013

Co-founder of the Consortium. Collaborated in fundraising efforts, resulting in nearly $150,000.

BACCLT Representative / Working Group Member

2014 – 2015

San Francisco Bay Area Regional Prosperity Plan - Housing the Workforce Working Group – as representative of the Consortium (BACCLT) presented to, and participated in the Working Group, providing guidance on ways to incorporate permanent affordability into preservation efforts, which were incorporated into the final policy guidance MTC's *Housing Affordability & Neighborhood Stability Toolkit* and in California Housing Partnership Corporation's (CHPC) *Preservation of Affordable Homes Near Transit Toolkit*.

Communication

Various webinars and workshops under the auspices of the California Community Land Trust Network and Enterprise Community Partners' *Preservation Next* series.

Co-Presented (with Steve King, Oak CLT) *Community Land Trusts: Assessment Challenges & the Search for a Consistent & Equitable Solution* at California Assessors' Association (CAA) 114th Annual Conference to promote implementation of AB-2818

Education

Master of Fine Arts

California College of the Arts (formerly California College of Arts & Crafts)
Oakland / San Francisco, CA

2003

Bachelor of Arts

Northwestern University

Evanston, IL

1991

Comparative Literature & Theory; Phi Beta Kappa; Departmental Honors

Ludwig-Maximilians-Universität München

Munich, Germany

1989-90

Comparative Literature & Theory; Germanistik

References Available upon request