

Trust Building: Building Relationships & Establishing Credibility

MHP TRAINING FOR MUNICIPAL HOUSING TRUSTS

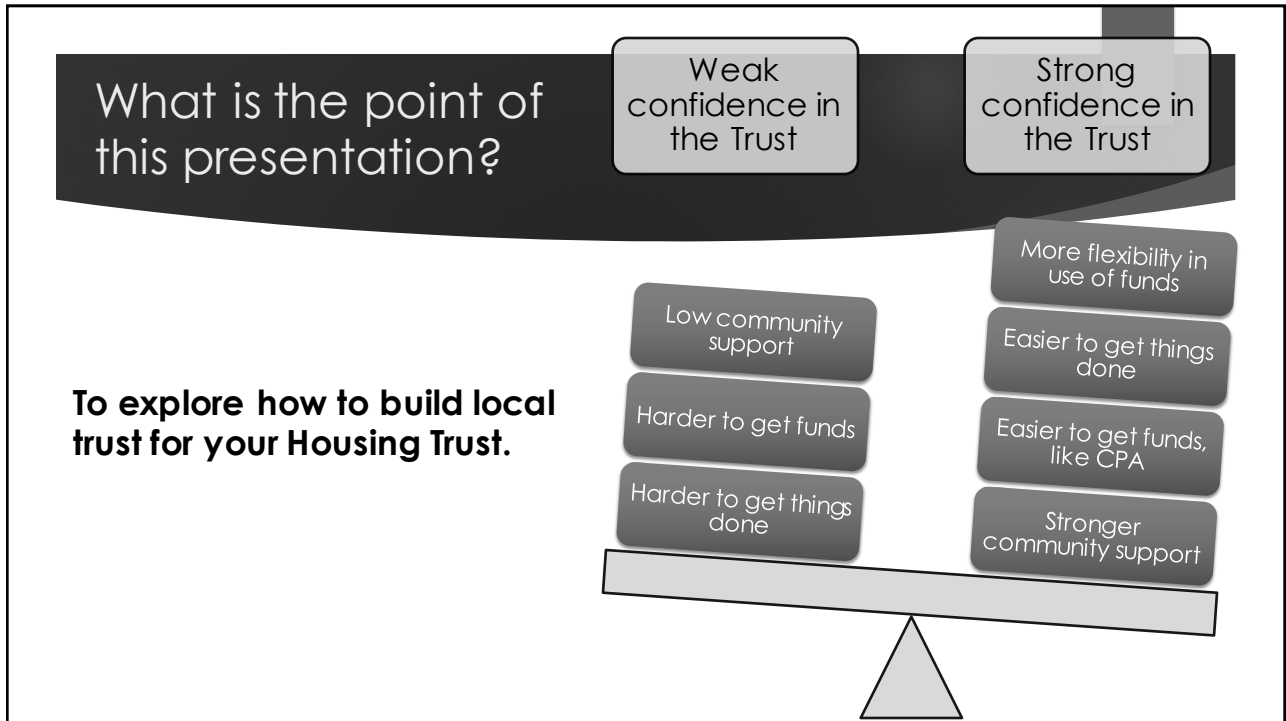
SEPTEMBER 16, 2016

Presented by: Jennifer M. Goldson, AICP, JM GOLDSON community preservation + planning



JM Goldson community preservation + planning

- ▶ Established consulting practice in 2006 with focus on:
 - ▶ Community preservation planning & implementation
 - ▶ Local affordable housing plans and Housing Trust action plans
 - ▶ Facilitate interactive meetings and community workshops
- ▶ Background:
 - ▶ Historic preservation and community planning
 - ▶ Municipal Planner – comprehensive planning and zoning/site plan review
 - ▶ Architecture & planning firm – neighborhood master plans and visioning



Discussion Question 1

Find a partner from another town and ask the following question:
How would you rate the level of confidence that town officials and community members have in your Trust? What leads you to believe this?

Discussion Question 2



Ask your partner:

How do you define success for your Trust?

If your Trust were to be totally successful, what would be the best possible outcome?

Discussion Question 3



Ask your partner:

What are some of the positive factors that help your Trust succeed?

Traps that turn initiatives into failures

- Lack of common and clear purpose
- Inadequate engagement and participation
- Voices that are essential but not included
- Frustrated participants and nonparticipants
- Resistance to change
- Nightmarish implementation for disproportionately small impact



Any examples?

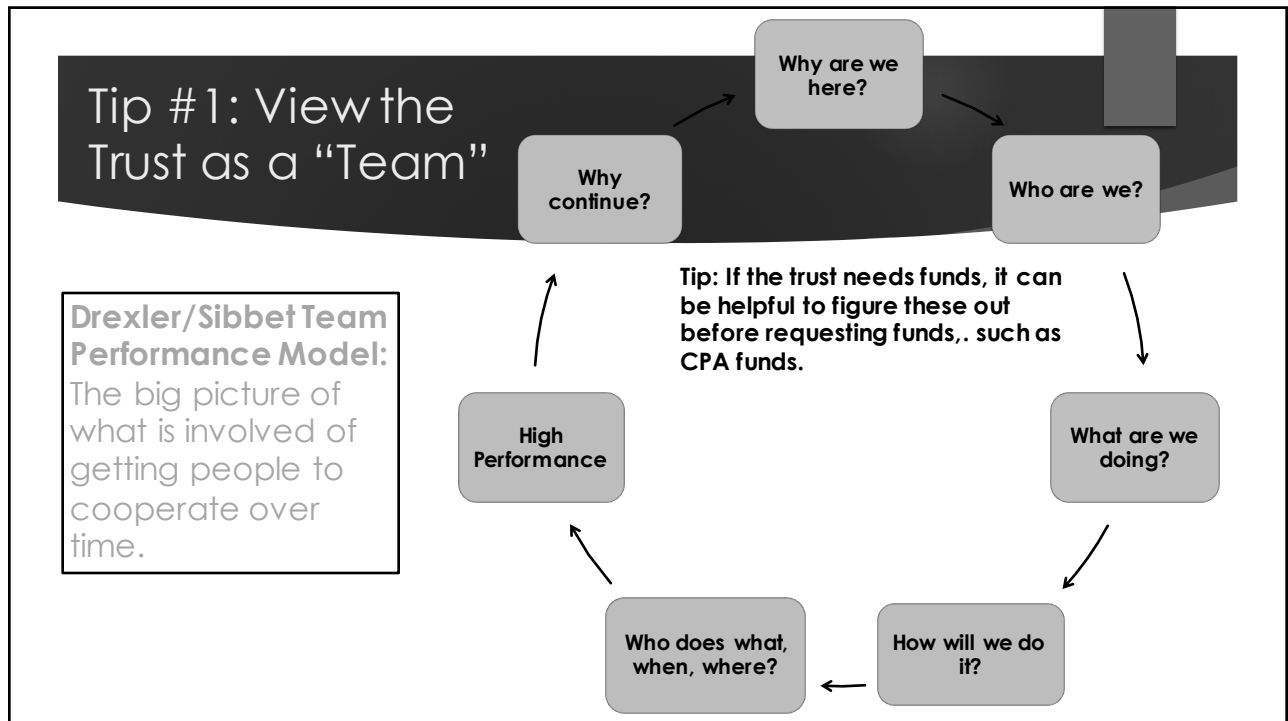
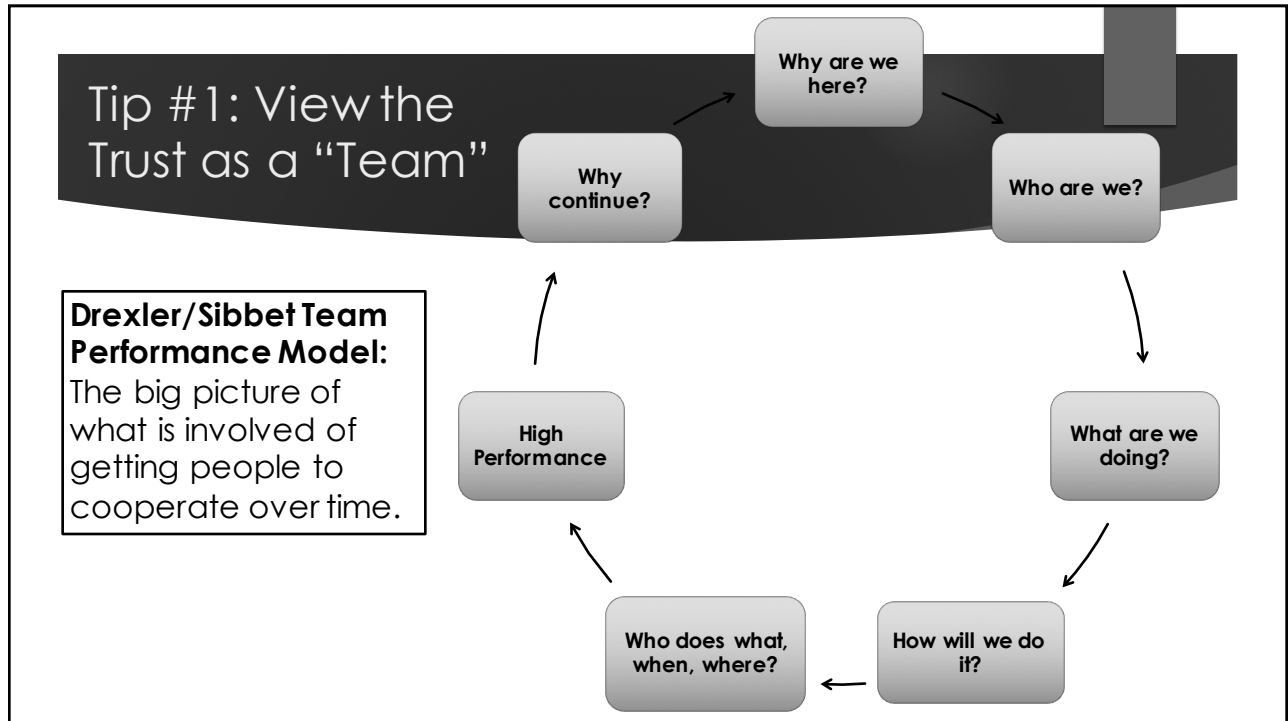
Discussion Question 4



Ask your partner:

What are some of the challenges or barriers to your Trust's success?

Of those challenges, what do you think is the greatest barrier to its success?



Quick Poll – Let's see show of hands

- 1. Does your trust rely on CPA funds for revenue?**
- 2. If yes to #1, does your trust have to request funds annually?** (As opposed to having an "automatic" allocation incorporated as part of the annual budget.)
- 3. If no to #1, do you hope to secure CPA funds in the future?**

Quick tangent
on CPA and
Trusts

THEN WE'LL GET BACK TO THE
DREXLER/SIBBET TEAM
PERFORMANCE MODEL

Three Primary Models for CPA Allocations to Housing Trusts

- ▶ Model #1: Trust as housing arm of the CPC
- ▶ Model #2: Hybrid – Standard % Allocation and Ability for Additional Allocations
- ▶ Model 3: Housing Trust submits applications to CPC for specific project/program or to support general, unspecified, CPA-eligible trust initiatives

Model #1 – Trust as housing arm of CPA

- ▶ CPA funds allocated for housing are included in annual budget to the Housing Trust
- ▶ No annual application to CPC
- ▶ CPC and Trust membership may overlap
- ▶ Trust can rely on expected standard designated percentage allocation of CPA funds annually
- ▶ Housing applicants seeking CPA funds would apply solely to the Trust
- ▶ This is the **STRONGEST** model for a Trust
- ▶ Example – Cambridge (80% CPA allocation)

Model #2 – Hybrid – Standard % Allocation and Ability for Additional Allocations

- ▶ Trust budgeted to receive standard % of CPA funds and applies for additional funding on an as-needed basis.
- ▶ CPC and Trust membership may or may not overlap
- ▶ Trust can rely on expected standard designated percentage allocation of CPA funds annually
- ▶ Housing applicants can go to both the Trust and/or CPC to request CPA funds (depending on local policy)
- ▶ This is a **MODERATELY-STRONG** model for a Trust
- ▶ Examples
 - ▶ Somerville (+/- 45%)
 - ▶ Yarmouth (10%)

Model #3 – Trust as an Applicant (no different from other housing applicants)

- ▶ Trust is not budgeted to receive standard % of CPA funds and must apply for any CPA funding
- ▶ CPC and Trust membership often do not overlap
- ▶ Housing applicants can go to the Trust and/or CPC to request CPA funds
- ▶ This is a **WEAK** model for a Trust as CPA is not a reliable funding source, which creates uncertainty and more time devoted to securing funds
- ▶ Also presents concerns for poor coordination of local housing priorities as little or no communication is required between CPC and Trust in reviewing separate applications
- ▶ Examples: Groton, Easton, name another trust and it's probably this model


Model 1 + 2 are great for places like Cambridge and Somerville . . .

But, our CPC would never go along with this!

What's a trust to do?

LET'S GET BACK TO THAT DREXLER/SIBBET MODEL

Discussion Question 5



Ask your partner:

To what extent has your Trust deliberately worked through these steps?

What do you think your Trust should do to strengthen its performance?

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graph TD
    A[Why are we here?] --> B[Who are we?]
    B --> C[What are we doing?]
    C --> D[How will we do it?]
    D --> E[Who does what, when, where?]
    E --> F[High Performance]
    F --> A
    
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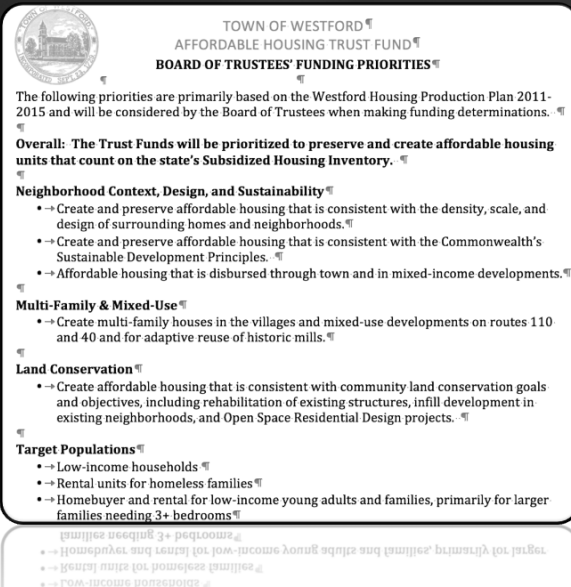
Tip #2: Work on things that matter

- Identify high priority, high impact initiatives to focus efforts on.
- Integrated with:
 - local policy agenda (including local Community Preservation goals)
 - local issues/needs
 - community feedback



Tip #3: Support good projects

- What is a “good project” for your community?
- Set criteria that reflect these characteristics and select projects based on this criteria



Tip #4: Showcase success

- Draw attention to the Trust's successful initiatives
- Use local media, hold events, keep an updated online home
- Stay in the public eye



Discussion Question 6



Ask your partner:

How would you rate your Trust's level of success at

- 1) **working on things that matter**
- 2) **supporting good projects**
- 3) **showcasing success**

What do you think your Trust should pursue to strengthen these areas?

Tip #5: People should know each other

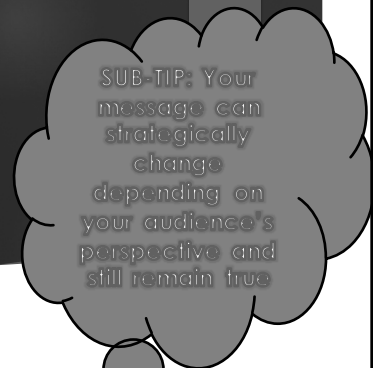
- Trust members should be well known by:
 - Key town officials
 - Town boards & committees
 - Community members
- Network



Tip #6: Know your message

Know your audience and develop the best message to reach them with.

Why should the community care about and support the work of your Trust?



Discussion Question 7



Ask your partner:

How would you rate your Trust's level of success at

- 1) The community knowing your Trust**
- 2) Trust tailoring and communicating its message**

What do you think your Trust should pursue to strengthen these areas?

My suggestion

- ▶ Take these seven questions back to your Trust and spend part of one or more meetings going through them together.
- ▶ This can give you the beginnings of a strategic plan.

Contact info

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planning, and community engagement?*

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