

The 2023 Census of Community Land Trusts in Canada

PREVALENCE, PRACTICE, AND IMPACT

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Executive Summary

The deepening housing affordability crisis across Canada has led to renewed interest in community land trusts (CLTs) as a means of developing and protecting permanently affordable housing. While there have been CLTs in Canada since the 1980s, there has been dramatic proliferation of the CLT model in the past decade. For the purpose of this census, we define a CLT to be a community-governed organization, or program of an existing organization, that owns land to be used for community benefit, often but not always focused on the provision of affordable housing. To better understand this growing sector in Canada, CLTs were surveyed on their organizational goals and characteristics as well as their land and residential unit holdings.

Below are key findings from the census and recommendations from the Canadian Network of Community Land Trusts in response to these findings. These recommendations are directed at a wide range of stakeholders with the ability to support the CLT sector, including federal, provincial, and municipal agencies and departments; foundations; and socially minded financial institutions.

- Community land trusts are widespread across Canada, continually expanding, and represent a national model for affordable housing stewardship and community economic development. **The majority of Canadians (53%) live in a census metropolitan area (CMA) with a CLT and 27% of all Canadian CMAs have at least one CLT operating.**
- **Per this study's definition, there are 41 CLTs in Canada; many are new and have no properties.** Of the 33 survey respondents, fully one-third (11) incorporated between 2020 and 2023, and five are still in the process of formal incorporation. The survey highlights the need for funding the organizational development of these early-stage CLTs: of the five unincorporated respondents, all are either currently unfunded or have been reliant on funding that will end in early 2024.
 - **CNCLT recommends that funders provide grants that support CLT organizational development, including the delivery of sector-specific support and knowledge mobilization.**
- **At least 13 CLTs hold any residential property, totalling approximately 9,995 units, which are mostly zero-equity co-operative or affordable rental in nature.** Canada's CLT landscape is distinct from that of the United States, where shared equity homeownership has been a central feature. In Canada, zero-equity co-operative housing units account for 59% of the units on CLT-owned or governed land (5,875 units total), while 3,534 (39%) CLT units are rental and 263 (3%) are resale-restricted homeownership units.
 - **CNCLT recommends that funders provide capital funding opportunities appropriate to CLT-led affordable homeownership development.**
 - **CNCLT recommends that funding programs for co-operative housing development be designed in alignment with the needs of the CLT sector.**

- CLTs are growing quickly, with at least 2,383 additional residential units expected to be completed by the end of 2024. Rental portfolios are growing the most quickly, with an expected unit increase of 50% (1,916 units) by 2025.
- CLTs identified lack of government funding for property acquisition, new development, and staff as key barriers to their growth. More than a third of incorporated respondents (37%) reported having no paid employees; among those with staff, the median number of total employees was only two.
 - CNCLT recommends that federal, provincial, and municipal governments provide capital funding for acquisition of existing rental housing, as well as operating grants to support CLT organizational development.
 - CNCLT recommends that funders provide reliable operating funding to enable early-stage CLTs to hire staff and increase internal capacity.
- CLTs are prioritizing leadership by equity-deserving communities. The majority (59%) of total board seats are filled by women or gender-diverse individuals, while 30% of board seats are filled by Black Indigenous or People of Colour (BIPOC) directors. BIPOC employees represent 43% of the total reported members of staff, however only 20% of respondents reported that their organization's top administrator identifies as BIPOC.
 - CNCLT recommends that funders support CLTs led by racialized communities by providing opportunities and funding for BIPOC leadership development.
- A number of groups, particularly newly incorporated and unincorporated groups, are led by and intend to primarily serve Black or Indigenous communities. Amongst all respondents, more than half (63%) of organizations identified racial equity and justice as a key value or core component of their work. Actions being taken in this area include implementing an equitable hiring process; targeting board recruiting to those from equity-deserving communities; and prioritizing racialized people in the tenant selection process.
 - CNCLT recommends that funders support CLTs led by racialized communities by providing reliable financial support for organizational development, peer-to-peer learning, and technical support.
- While most CLTs regard climate change as a key concern, only 19% of CLTs are actively discussing and planning strategies to address climate change. The most frequently cited barriers were a lack of funding for planning (43%) and for implementation (39%) of climate action.
 - CNCLT recommends that funders support CLTs in building internal capacity to proactively increase climate resilience.

About the Canadian Network of Community Land Trusts

The Canadian Network of Community Land Trusts (CNCLT) is a network of over 40 community land trusts and allied organizations working towards the success and growth of the community land trust (CLT) model throughout Canada. CNCLT envisions a Canadian CLT sector that is well-connected, enabled by government policy and funding, and driving a major increase in the national share of non-market housing assets.

Acknowledgements

We would like to thank the Canadian Network of Community Land Trusts' staff, board, and membership for their support through the production of this report. We are also very appreciative of the Grounded Solutions Network team, whose work on the American CLT census informed this project.

We would like to thank all those who completed the survey for being generous with their time and expertise. We would particularly like to thank the Orillia Community Land Trust for beta testing the survey design. We hope this report will add to the growing body of research on permanently affordable and community-controlled housing in Canada, across Turtle Island, and beyond. Thank you to the Social Sciences & Humanities Research Council of Canada, the University of Toronto, and an anonymous donor for funding this work.

We would like to acknowledge the land on which we work today is the result of settler colonialism. The CLTs included in this report operate on land belonging to diverse First Nations, Inuit and Métis peoples. Tkaronto (Toronto), where the University of Toronto is based, is the traditional land of the Mississaugas of the Credit, the Nishnaabeg, the Chippewa, the Haudenosaunee, and the Wendat peoples. Tkaronto is covered by Treaty 13 with the Mississaugas of the Credit. Today, it is to home of many Indigenous people from across Turtle Island. As the CLT movement continues to grow, we must recognize our responsibilities to engage in a meaningful, continuous process of truth and reconciliation with Indigenous Peoples whose land we work and live on.

Table of Contents

Executive Summary	1
About the Canadian Network of Community Land Trusts	3
Acknowledgements	3
Introduction	7
<i>Community Land Trusts in Canada</i>	7
<i>Grounded Solutions Network Census 2022</i>	7
Methodology	8
<i>Scope</i>	8
<i>Survey Design</i>	8
<i>Data Collection Methods</i>	9
<i>Response Rate</i>	10
<i>Estimating Total Units</i>	11
<i>Study Limitations</i>	12
Results	13
<i>Organization Structure</i>	13
Legal Form & History.....	13
Organization Scope & Characteristics.....	14
Organization Staff & Volunteers.....	16
Organization Board.....	17
Membership.....	19
Non-residential Activities.....	21
Racial Equity & Inclusion.....	21
Unincorporated Group Characteristics.....	22
<i>Residential Portfolios</i>	25
General Portfolio Characteristics.....	25
Rental Portfolios.....	30
Co-operative Portfolios.....	34
Affordable Homeownership Portfolios.....	35
<i>Climate Change & CLTs</i>	36
Discussion	38
<i>The Canadian CLT Landscape</i>	38
<i>Strengths</i>	39
<i>Challenges</i>	40
<i>Recommendations</i>	41
References	43

List of Figures

- Figure 1: Map of Respondent and Non-respondent Organizations11
- Figure 2: Share of Organizations by Incorporation Status (n = 33)13
- Figure 3: Number of Organizations by Decade of Incorporation (n = 27).....14
- Figure 4: Share of Organizations by Organization Type (n = 28).....14
- Figure 5: Number of Organizations by Association or Network Affiliation (n = 27).....15
- Figure 6: Number of Organizations by Service Area Type (n = 27)16
- Figure 7: Number of Organizations by Form of Paid Employees (n = 27)16
- Figure 8: Share of Organizations by Response to “Does your organization’s top administrator identify as BIPOC?” (n = 15)17
- Figure 9: Total Filled Board Seats by Board Member Demographic (n = 24)18
- Figure 10: Share of Organizations by Board Seat Allocation (n = 20)18
- Figure 11: Number of Organizations by Membership Status (n = 25)19
- Figure 12: Share of Total Membership by Membership Category (n = 12)20
- Figure 13: Share of Organizations by Membership Responsibilities (n = 14).....20
- Figure 14: Share of Organizations by Non-Residential Activities Offered or Planned (n = 27).....21
- Figure 15: Share of Organizations by Level of Commitment to Racial Equity and Justice (n = 27).....22
- Figure 16: Share of Unincorporated Groups by Funding Status (n = 5).....24
- Figure 17: Number of Organizations by Residential Portfolio Size (n = 13)25
- Figure 18: Share of Organizations by Barriers to Acquiring or Developing New Units ..26
- Figure 19: Number of Organizations by Decade of First Residential Property Acquisition (n = 8).....27
- Figure 20: Share of Organizations by Top 12 Funding Sources for Residential Portfolios (Existing or In-Development) (n = 8).....29
- Figure 21: Number of Rental Units (Current and in Pipeline) (n = 10)30
- Figure 22: Number of Organizations by New Tenant Selection Method (n = 6).....32
- Figure 23: Total Co-operative Units - Current and In Pipeline (n = 3)33
- Figure 24: Total Homeownership Units - Current and In Pipeline (n = 4).....34
- Figure 25: Number of Organizations by Climate Change-Related Weather Events Affecting CLT Properties (n = 26)35

List of Tables

Table 1: Survey Inclusion and Exclusion Criteria..... 8

Table 2: Shared Equity and Affordable Homeownership Inclusion and Exclusion
Criteria 9

Table 3: Overview of Survey Response Rate10

Table 4: Number of Respondents by Province/Territory (n=33)15

Table 5: Location of Residential Properties (n = 8)..... 27

Table 6: Number of Organizations by Method of Acquisition or Development (n = 8).28

Table 7: Definitions of Affordability for Rental Units (n = 6).....31

Table 8: Length of Affordability Term for Rental Units (n = 6).....31

Table 9: Resident Selection Criteria for Affordable Rental Units (n = 6)..... 32

Table 10: Climate Change Adaptation and Mitigation Strategies Taken by Respondents
(n = 26)..... 35

Table 11: Residential Unit Portfolio of Total CLT Population (n = 13)..... 37

Introduction

Community Land Trusts in Canada

The deepening housing affordability crisis across Canada has led to renewed interest in community land trusts (CLTs) as a means of developing and protecting affordable housing. While there have been community land trusts (CLTs) in Canada since the 1980s, there appears to have been a dramatic proliferation of the CLT model in the past decade. The Canadian CLT movement has been heavily influenced by the success of CLTs in the United States, where the first community land trust was established in the 1960s as part of the civil rights movement (Davis, 2014). However, CLTs in the Canadian context have diverged from their American counterparts in important ways and this sector merits separate study.

Efforts to understand the state of the Canadian CLT sector date back to at least 2005, when the Canada Mortgage and Housing Corporation (CMHC) published a report on the sector's needs at that time. In recent years, there has been further analysis of the Canadian CLT movement in academic literature: Bunce and Aslam (2016) examined the urban CLT movement within the broader context of non-governmental land trusts; Bunce and Barndt (2020) provided a history of CLT development, organizing the sector's history into first generation and second generation CLTs; and Spicer et al. (2022) examined the public variant of residential land trusts in the Canadian context. In 2022-2023, the Canadian Network of Community Land Trusts (CNCLT) carried out a needs assessment of its CLT members, a qualitative data collection effort that was used to shape CNCLT's technical assistance services. This survey builds on these previous efforts to understand the country's CLT sector and has engaged the greatest number of respondents of any Canadian CLT study to date.

The goals of this survey of Canadian CLTs are as follows:

1. To understand the state of the sector and its growth to date.
2. To understand the sector's current needs and projected growth.
3. To provide a baseline for future research, enabling meaningful analysis of the sector's growth.

For the purpose of the survey, we understand a community land trust to be a community-governed organization, or program of an existing organization, that owns land to be used for community benefit, often but not always focused on the provision of affordable housing. A more detailed description of the survey's scope can be found in the *Methodology* section below.

Grounded Solutions Network Census 2022

In 2022, Grounded Solutions Network conducted a census of American community land trusts and shared equity programs, in partnership with the University of Toronto. The results of the census are analyzed and discussed in a report published by the Lincoln Institute of Land Policy (Wang et al., 2023).

This census found the existence of 314 community land trust and shared equity entities in the United States. American CLTs hold land for a wide range of uses, including shared equity homeownership, rental or co-op housing, agricultural uses, and commercial uses. Shared equity homeownership remains the focus of much of the American CLT sector, with the traditional CLT model involving the use of a ground lease to separate ownership of the land from ownership of the unit and to ensure units are resold at an affordable price.

Methodology

Scope

This survey intended to capture active organizations that self-identify as CLTs and that display one or more key characteristics of the CLT model. Table 1 below summarizes which organization types were included and excluded.

Table 1: Survey Inclusion and Exclusion Criteria

INCLUDE	EXCLUDE
<ul style="list-style-type: none"> ● Self-identifies as a community land trust (whether CLT/LT is part of organization name or not) ● Active organization ● Incorporated as a non-profit, or working towards incorporating and acting as a CLT ● Key goal of org is to hold land to use for community benefit, whether or not that includes housing 	<ul style="list-style-type: none"> ● Unincorporated AND unsure whether or not the organization will act as a CLT once incorporated ● Inactive organizations ● Conservation land trusts ● For-profit organizations ● Organizations that support community land trusts or similar models, but do not intend to hold land themselves

Survey Design

Our survey was developed based on the 2022 Grounded Solutions Network survey used to study CLTs in the United States. Significant changes were made to the survey structure to accommodate for different organization legal structures used in Canada, prevalence of different CLT models, and the high number of newly incorporated or unincorporated organizations in the sector.

The survey was structured into three sections: organization characteristics, residential and non-residential portfolios, and climate change. The first section on organization characteristics included questions about legal form, origins, service area, membership, staff, board of directors, and non-residential activities. The second section on residential portfolios was separated into three sections: affordable rental housing, co-operative housing, and shared equity and affordable homeownership. Organizations were asked about their rental portfolios, geographic location, number

of units, funding for acquiring and developing their existing and future rental portfolios, tenant selection, and affordability.

For our section on shared equity and affordable homeownership we listed additional inclusion and exclusion criteria summarized in Table 2 below. A broad definition of affordable homeownership and shared equity was used to capture as many different organizational structures as possible. However, this definition, limitations in survey design, and user error this resulted in two to three organizations not completing the homeownership portfolio section. One of these organizations is the Toronto Islands Residential Land Trust, which is one of oldest residential land trusts in Canada and which is composed of 262 resale-restricted homeownership units. While permanent affordability is not prioritized in the resale price calculation, we felt it was valuable to include this organization in our analysis because it incorporates key characteristics of the community land trust model, and it works to protect housing from speculative investment.

Table 2: Shared Equity and Affordable Homeownership Inclusion and Exclusion Criteria

INCLUDE	EXCLUDE
<ul style="list-style-type: none"> Single-family homeownership units – both detached and attached – and condo units that are priced below market rate and resale-restricted to stay affordable to households with low to modest incomes 	<ul style="list-style-type: none"> Homeownership units that DO NOT have resale restrictions Homeownership units that have affordability restrictions but are not intended to remain affordable permanently Homeownership units that are NOT priced below market rate Rental units Lease-to-purchase units Co-operative housing units

A number of organizations completing the survey were not yet incorporated or did not have an existing residential portfolio. The survey was structured with conditional questions to only ask organizational structure questions and portfolio questions if respondents indicate the questions were relevant. Unincorporated groups were directed to a shorter version of the survey with questions about their organizational goals, plans, and future activities.

The survey was developed using Survey Monkey and included a mix of multiple choice and open-ended questions. The initial draft of the survey was sent to one organization for beta testing. Feedback was incorporated into the final version of the survey.

Data Collection Methods

Data collection for this project began in March 2023 and ended in June 2023. Data collection began by developing a database of contact information for active CLTs

across Canada. CNCLT’s contact database was used as a starting point for identifying CLTs to be included in survey outreach. The research team supplemented this through information found about the CMHC demonstrations initiative, CLT websites, and CNCLT staff networks.

The survey was initially distributed by the research team via email the week of May 1st and asked respondents to complete the survey by May 12th. Organizations were sent a reminder email the week of May 8th. Organizations that did not complete the survey by May 12th were followed up with via email the following week. One organization completed the survey over the phone with a researcher.

The research team made themselves available to answer questions about the survey scope and content while conducting outreach. The research team also verified survey responses as data was collected. Some organizations were asked follow-up questions after completing the survey in cases where researchers needed additional context on respondents’ answers.

Respondents were provided a thank-you gift for sharing their time and expertise, with the size of the gift depending on the number of survey questions completed. Unincorporated groups and organizations without property were offered a gift of \$25 and organizations with property were offered \$100.

Response Rate

Eight organizations that were originally on the population list were later removed because they were found to fall outside the survey scope¹. One organization was added to the population list after the survey was completed as a result of CNCLT’s continual outreach to CLTs. Table 3 below provides a breakdown of the final population list; 33 valid responses were received of a total population of 41 CLTs, yielding a response rate of 80%.

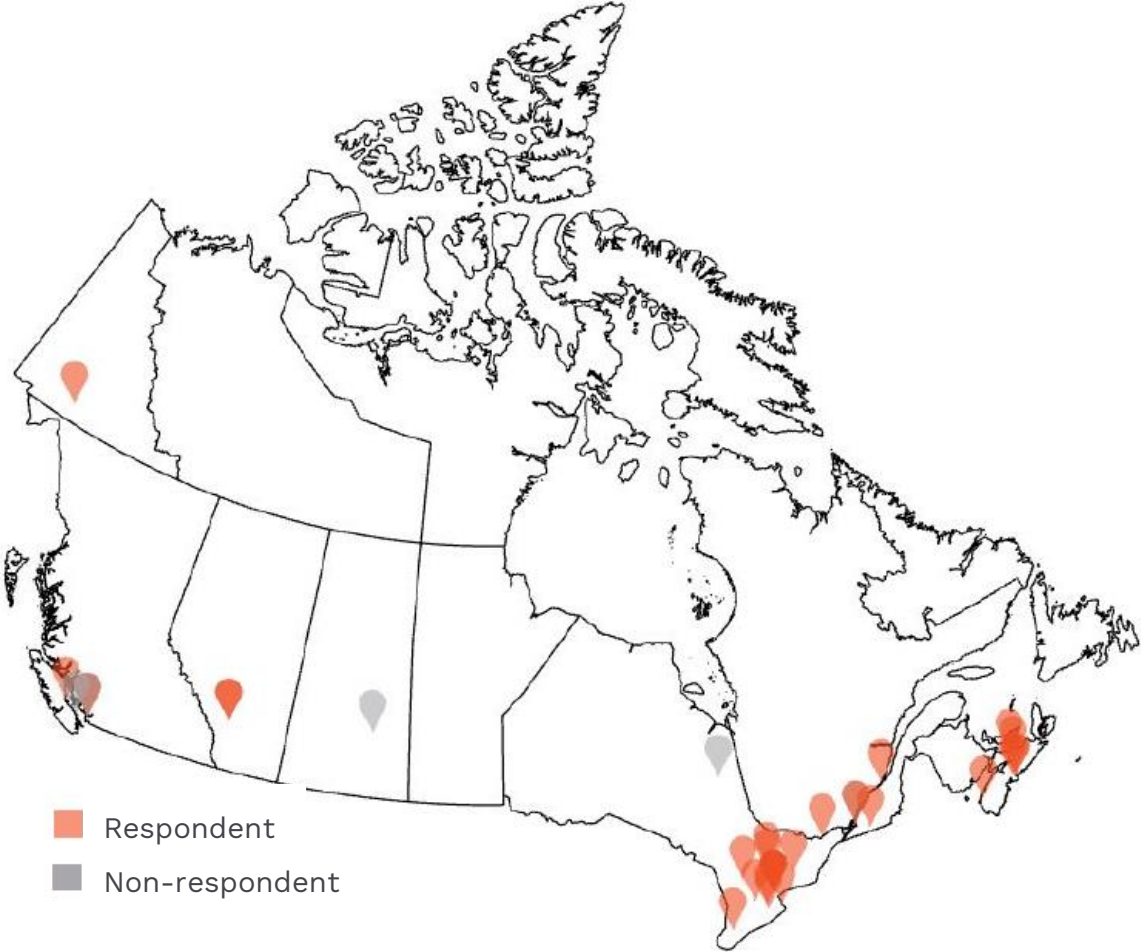
Table 3: Overview of Survey Response Rate

Total CLT Population	41
Respondents	33
Non-respondents	7
Included in population after survey	1
Response Rate	80%

¹ The scope for the survey includes active organizations that self-identify as a community land trust (whether CLT/LT is part of organization name or not), are incorporated or working toward incorporation as a non-profit and acting as a CLT, and/or has a key goal to hold land to use for community benefit.

Four provinces and two territories were not represented in the population list for this survey as they were found to have no active organizations that fall within the project scope (Manitoba, Newfoundland and Labrador, New Brunswick, Northwest Territories, PEI, and Nunavut).

Figure 1: Map of Respondent and Non-respondent Organizations



Estimating Total Units

We used publicly available information on non-respondents to approximate their total unit counts when relevant. Where possible, we verified this data with the organizations to ensure accuracy. As public information was limited, we were not able to gather more detailed information on these non-respondents' planned developments, housing type, or other characteristics.

As noted above, no organizations indicated that they have affordable homeownership units within the survey; however, two CLTs do have resale-restricted homeownership portfolios, totalling 263 units. These units were therefore included in our total unit calculations.

Study Limitations

While the survey team made significant efforts to document all CLTs in Canada, it is possible there are active CLTs that are not known to us. The CLT landscape is constantly evolving. Due to our reliance on web searches and online information, organizations with no or little online presence may have been excluded.

The CLT sector has experienced considerable growth in recent years; nevertheless, the small population size presented some challenges for data analysis. As a result of using conditional questions, including “I don’t know” as a multiple-choice response, and making certain questions optional, the population size varied across survey questions. Some questions were omitted from our results due to an insufficient number of responses for meaningful analysis. Small sub-populations sometimes created challenges for quantitative analysis, given that one outlier may skew the results significantly. Where this occurs in the analysis, we highlight important outliers and may also share the median in addition to the mean in order to better represent the spread of results.

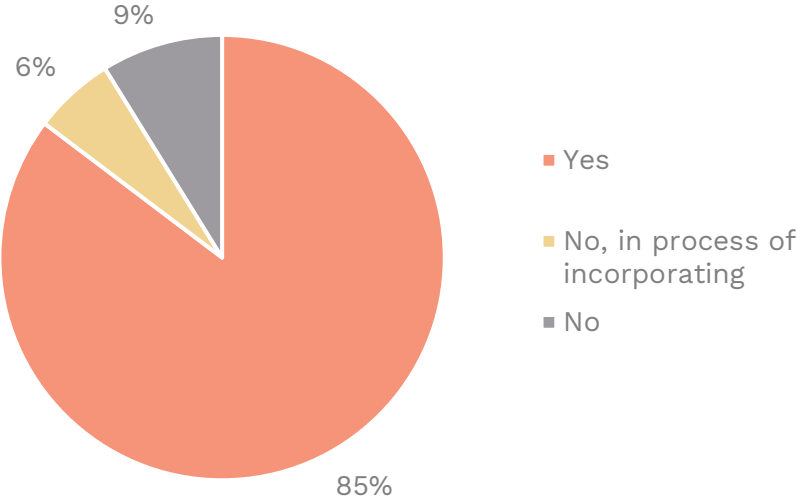
Results

Organization Structure

Legal Form & History

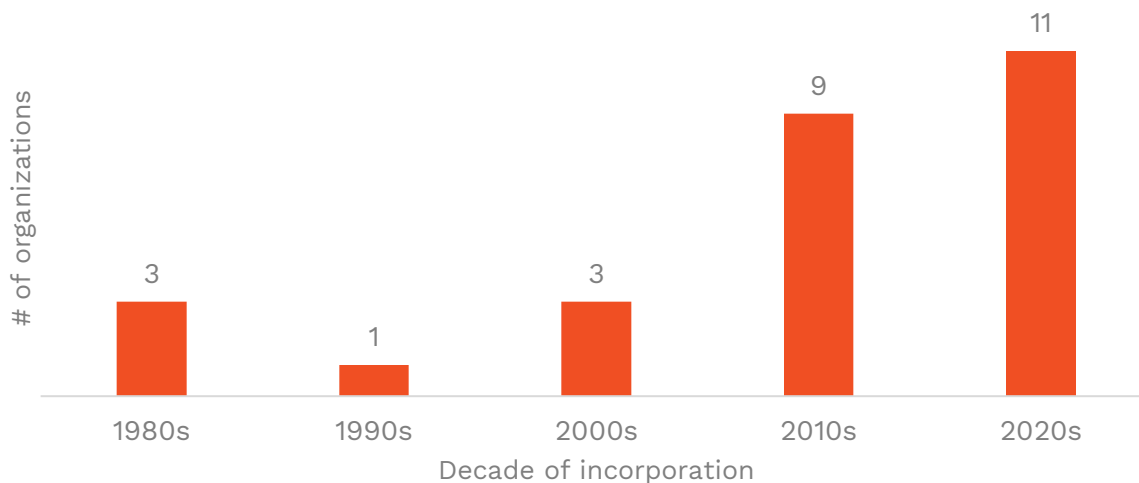
As shown in Figure 2 below, the majority of respondent organizations were incorporated (85%, or 28 organizations), while two (6%) organizations were in the process of incorporating. Three respondents (9%) had not yet begun the process of incorporating but were included in the survey because they represent organized groups that intend to incorporate and run as a community land trust.

Figure 2: Share of Organizations by Incorporation Status (n = 33)



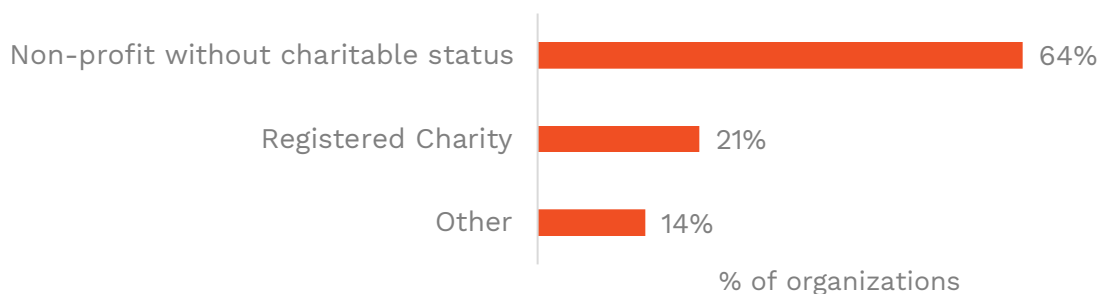
The average year of incorporation among respondent organizations was 2013 (n = 27); however, the median year was 2018, and 41% of respondents were incorporated in 2021 or later. The two oldest respondents are organizations that began incubating a community land trust long after the organization’s original incorporation. Figure 3 below shows the spread of years of incorporation.

Figure 3: Number of Organizations by Decade of Incorporation (n = 27)



As Figure 4 shows, the majority of respondents are non-profits without charitable status (64%, or 18 organizations), although registered charities represent a significant portion of respondents (21%). Four organizations fit into neither category: two are co-operatives under the Co-operative Corporations Act of Ontario, one is a provincial government agency, and one is a unique form of condominium corporation.

Figure 4: Share of Organizations by Organization Type (n = 28)



Organization Scope & Characteristics

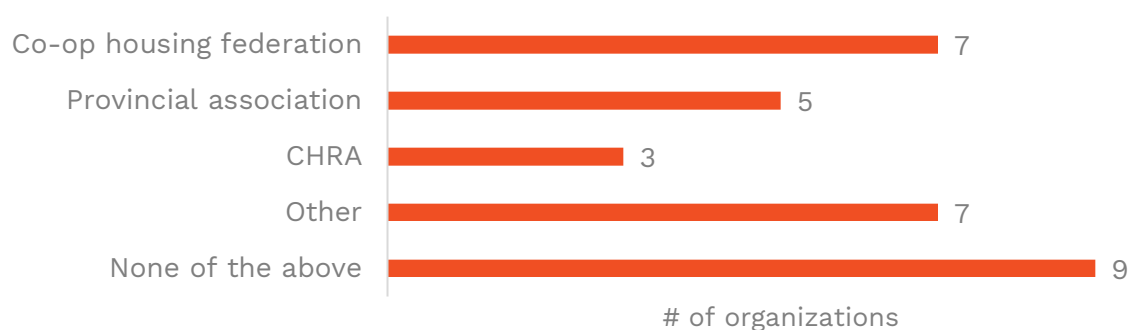
Respondent organizations spanned five provinces and one territory. The provinces with the greatest number of CLTs that responded to the survey were Ontario, British Columbia, Nova Scotia, and Quebec, with 39% of respondents (16) located in Ontario.

Table 4: Number of Respondents by Province/Territory (n=33)

Province/Territory	# of CLTs
British Columbia	5
Alberta	2
Saskatchewan	0
Manitoba	0
Ontario	16
Quebec	3
Newfoundland and Labrador	0
New Brunswick	0
Nova Scotia	6
Prince Edward Island	0
Yukon	1
Northwest Territories	0
Nunavut	0

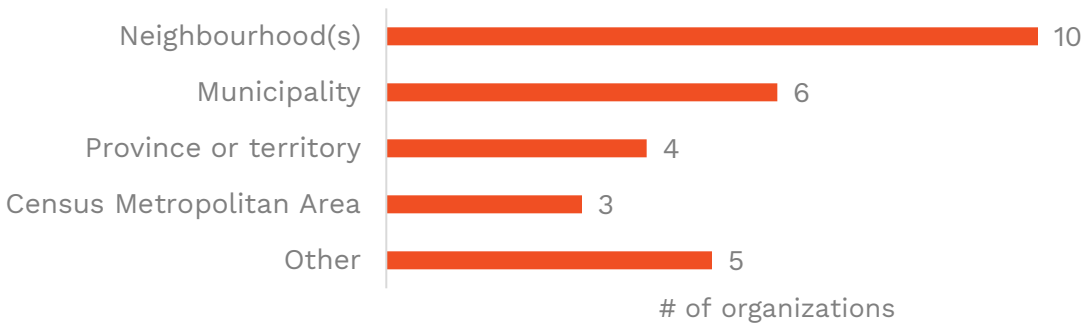
Incorporated organizations were asked about their affiliation or membership with associations or networks, excluding the Canadian Network of Community Land Trusts. The majority (67%) of respondents belong to at least one network or association, with co-op housing federations (regional, provincial, or federal) representing the most common affiliation (26%).

Figure 5: Number of Organizations by Association or Network Affiliation (n = 27)



Respondents were asked about the service area where their CLT works. The most common response was “one or more neighbourhood(s)” (36%), followed by the municipality (21%). Five organizations (18%) reported service areas that do not fit into any of the categories listed; these include a specific island and multiple regions.

Figure 6: Number of Organizations by Service Area Type (n = 27)

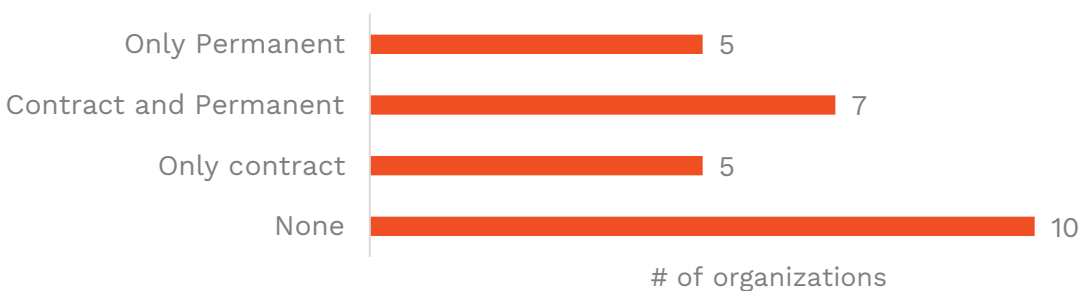


Respondents were asked whether their organization acknowledges any Indigenous land rights and/or treaty obligations (n = 27). The majority (81%) responded that they do and were asked for further detail. The most commonly reported form of recognition of Indigenous land rights and/or treaty obligations was performing land acknowledgements. Approximately half of respondents reported additional practices that include building partnerships with Indigenous groups and ensuring Indigenous representation on their boards.

Organization Staff & Volunteers

Respondents were asked about the composition of their paid workforce, excluding volunteers and board members. The majority of respondents (63%) had at least one paid member of staff, although in 19% of cases all employees were employed on a contract basis.

Figure 7: Number of Organizations by Form of Paid Employees (n = 27)

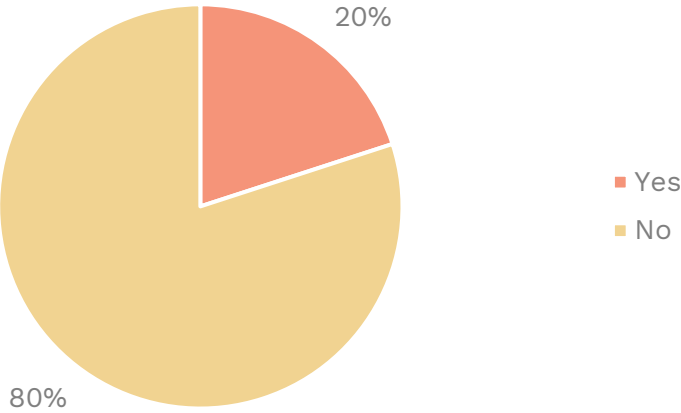


Among organizations with a paid workforce, the number of employees reported varied significantly, from 1 to 30. The size of a CLT's staff depends not just on the CLT's portfolio size, but also on its operating model: while some CLTs will manage and maintain properties in-house, others will lease or contract to non-profit housing operators, housing co-operatives, or property managers who provide maintenance and tenancy services.

The average number of total employees among respondents that have staff (counting both full-time and part-time) was 6, with a median of 2 (n = 17). Black, Indigenous, and People of Colour (BIPOC) employees represented 43% of the total members of staff (n = 14; note that not all respondents had this data available).

One in five (20%, or 3) respondents reported that their top administrator is BIPOC, as shown in Figure 8.

Figure 8: Share of Organizations by Response to “Does your organization’s top administrator identify as BIPOC?” (n = 15)



Volunteers play an important role in many CLTs, particularly those without paid staff. Respondents were asked how many people completed volunteer work for their organization in the past year, excluding staff and board members. The average number of volunteers per organization was 19, with a median of 10 (n = 27); responses ranged from 0 to 100, with 81% reporting at least one non-board member volunteer. The three organizations with the largest number of volunteers have projects or provide services beyond a community land trust.

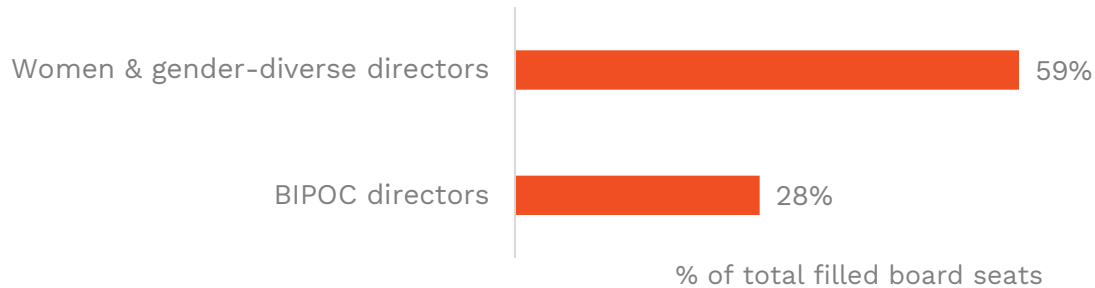
The roles played by volunteers ranged widely, with some taking on key operating and administrative tasks (particularly in organizations without staff) and others carrying out activities not directly related to governance or the provision of housing, such as community garden maintenance and fundraising.

Organization Board

Respondents were asked about the composition of their boards of directors. Overall, 59% of filled board seats were held by women or gender-diverse individuals, while 30% were held by BIPOC individuals (n = 24). The level of BIPOC representation varies

widely: one third of respondents have no BIPOC board members, while 21% have boards that are majority BIPOC directors.

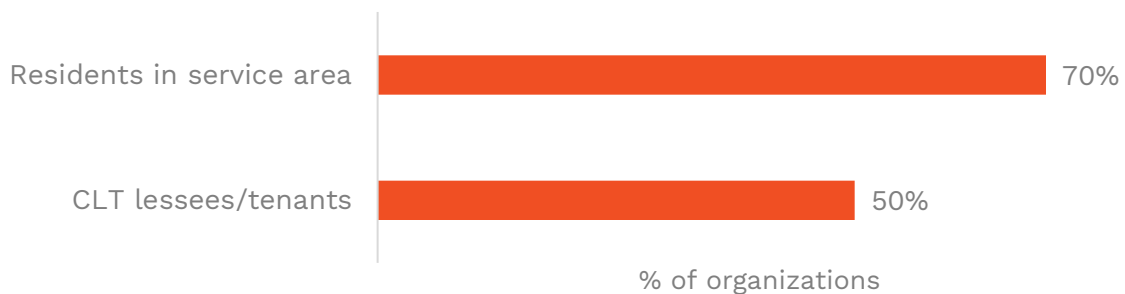
Figure 9: Total Filled Board Seats by Board Member Demographic (n = 24)



The traditional CLT model involves a tripartite board of directors, whereby one third of board seats are filled by those living in housing on CLT land; one third are filled by other residents within the CLT’s service area; and the final third are filled by representatives of local organizations, elected officials, and other experts. Respondents were asked what percentage of board seats must be filled by those living in CLT housing and by other residents within the organization’s service area. Five organizations of the 25 that provided a full description of their board structure reported that their board composition is currently under development and/or will likely change when they acquire or develop their first residential unit(s).

Of the remaining 20 respondents, half (50%) allocate at least one board seat for a CLT resident, while 70% allocate at least one board seat for a resident within the CLT’s service area. A quarter (25%) of respondents allocate one-third or more board seats for CLT residents, while 45% allocate one-third or more board seats for residents within the CLT’s service area. Three respondents (15%) use an explicitly tripartite board structure, allocating 33% of board seats for each of the categories described above.

Figure 10: Share of Organizations by Board Seat Allocation (n = 20)



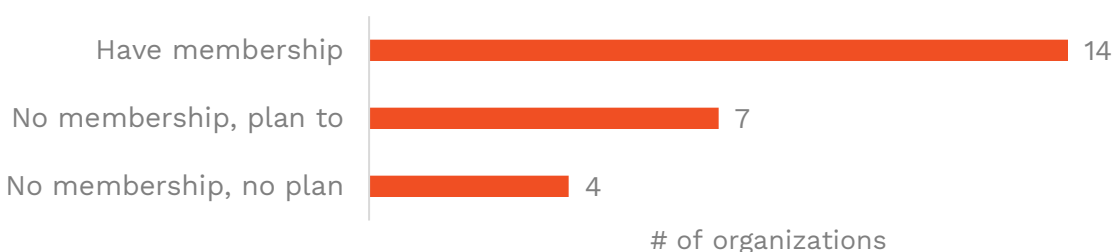
Beyond the three categories of board members described above, respondents also allocated board seats based on ethnicity (in this case, those identifying as African Nova Scotian, for a community land trust based in a historic African Nova Scotian

neighbourhood) and based on experience of displacement from studio space (in the case of a community land trust aspiring to steward cultural spaces).

Membership

The majority of respondents indicated that they have a corporate membership that includes those living or working in their organization’s service area (54%), and 27% responding that they plan on setting up such a membership.

Figure 11: Number of Organizations by Membership Status (n = 25)

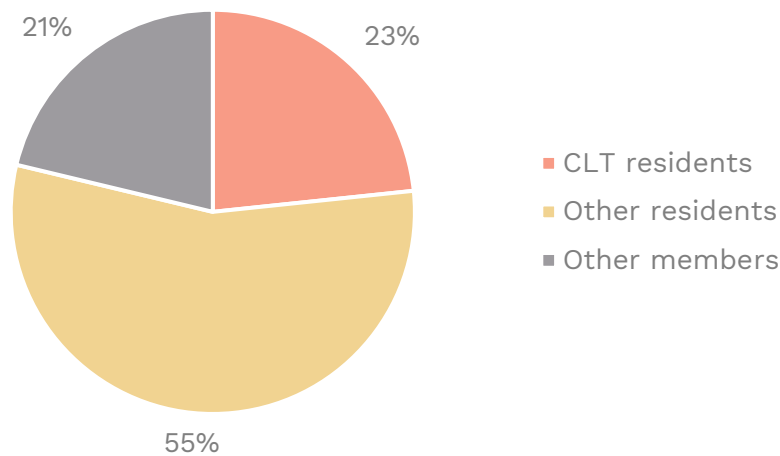


Of the 14 respondents that have a membership, 13 provided their current total number of members, representing 2,546 members in total. Respondents have an average of 196 members per organization and a median of 125 members (n =13). The majority (62%) of respondents do not have any non-voting members; non-voting members account for 18% of the total membership number (n = 13).

Respondents were asked about the composition of their membership. Figure 12 below shows each category as a percentage of the total number of members; “CLT residents” refers to those who live on CLT-owned land, “other residents” refers to non-CLT residents who live within the CLT’s service area, and “other members” refers to all other types of members.

Non-CLT residents represent 55% of the total membership; 58% of respondents had no members who are CLT residents, with most of the total number of CLT resident members coming from one respondent with a large residential portfolio. It is reasonable to expect that as more CLTs develop a residential portfolio (see *General Portfolio Analysis* section for analysis on CLT portfolio development), resident members will represent a larger proportion of CLT membership.

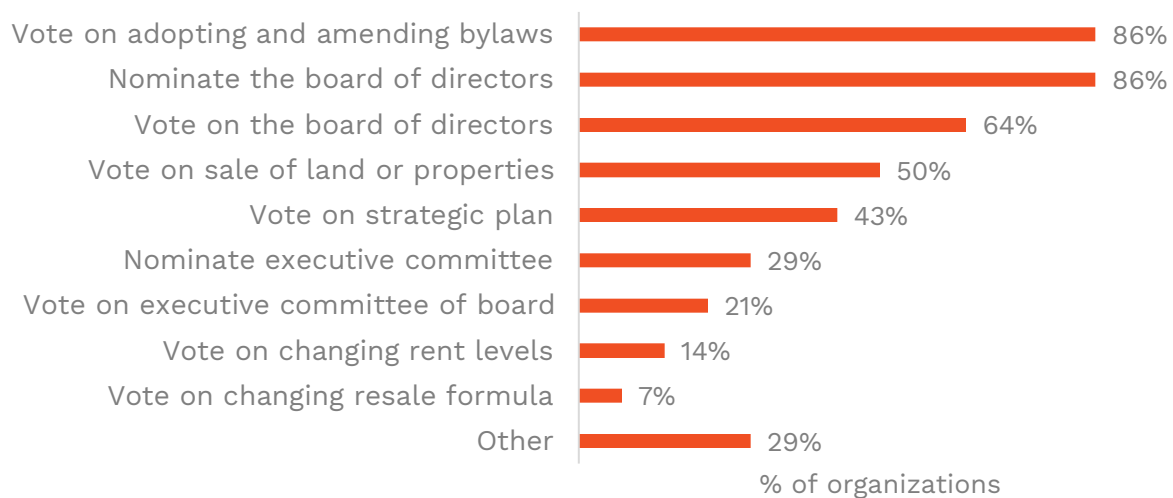
Figure 12: Share of Total Membership by Membership Category (n = 12)



Respondents were also asked to provide the number of members who are BIPOC; only six respondents had access to this data, with several respondents indicating that they do not collect this information on members. BIPOC members represent 15% of the total membership reported by respondent organizations (n = 6).

Respondents were asked about the responsibilities of their memberships. Figure 13 shows the frequency of each response; the most common responsibilities are nominating the board of directors (86%) and voting on adopting and amending bylaws (86%). Other responsibilities included adopting the CLT’s budget, making decisions related to development and community engagement, voting on removal of directors or members, voting on taking on debt or purchasing land, and directing eviction prevention policies.

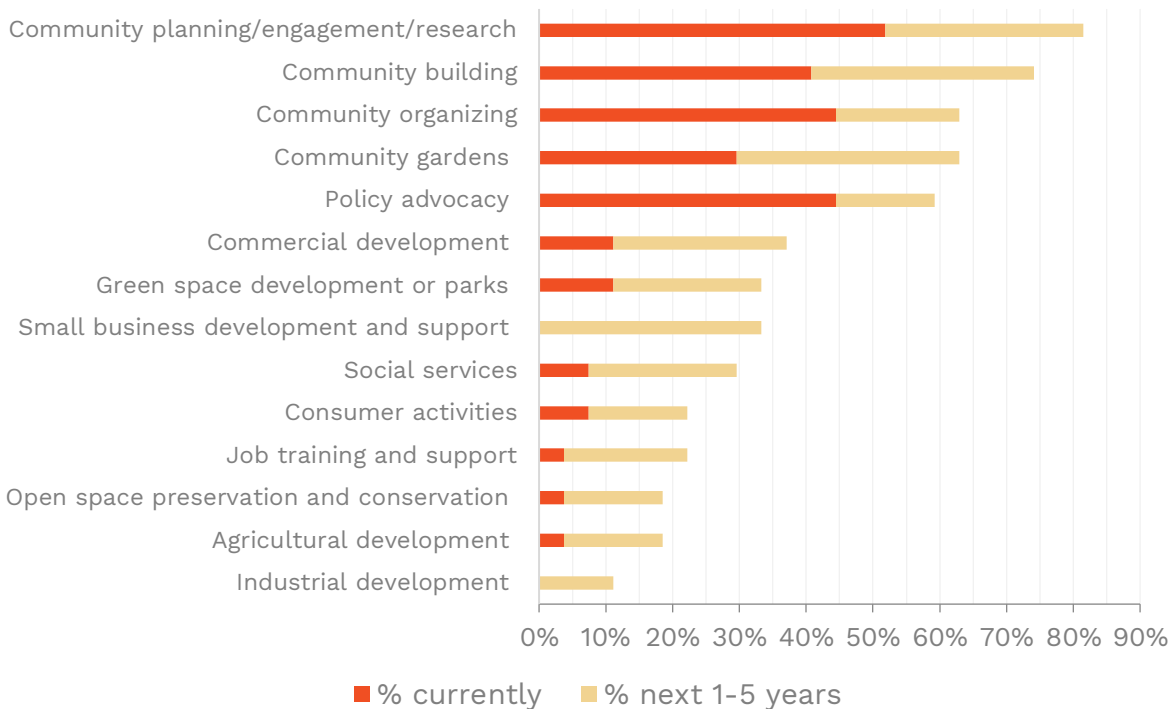
Figure 13: Share of Organizations by Membership Responsibilities (n = 14)



Non-residential Activities

Respondents were asked about activities that they carry out, beyond the stewardship of land and provision of affordable housing. They were asked if they currently or previously carried out an activity, as well as if they intend to begin carrying out that activity within the next 1 to 5 years. As shown in Figure 14 below, CLTs provide a wide range of services not directly related to their residential portfolios, with the most common being community planning, engagement, and research (52%); policy advocacy (44%); and community organizing (44%). Further, respondent organizations intend to expand their community activities in the coming years, with particular interest in carrying out small business development and support, community gardens, and community building (33% each).

Figure 14: Share of Organizations by Non-Residential Activities Offered or Planned (n = 27)

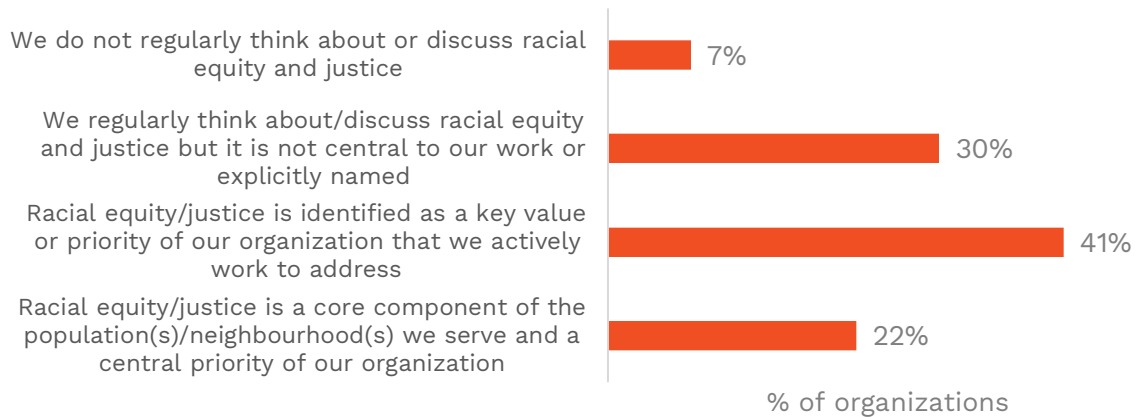


Racial Equity & Inclusion

Respondents were asked about their organization's commitment to racial equity and justice and specific actions they are taking to demonstrate this commitment. The level and form of commitment varied widely; some CLTs (22%) have as their core goal improving housing outcomes for racialized communities (for example, CLTs in Nova Scotia led by African Nova Scotian communities), while others incorporate racial equity and justice into a broader lens of housing justice and support for low-income communities.

Figure 15 below demonstrates how respondents quantified their commitment in this area, with most organizations (71%) falling somewhere between identifying racial equity and justice as a core component of their work and not prioritizing racial equity and justice at all. Actions being taken in this area include implementing an equitable hiring process; targeting board recruiting to those from equity-deserving communities; and prioritizing racialized people in the tenant selection process.

Figure 15: Share of Organizations by Level of Commitment to Racial Equity and Justice (n = 27)



Respondents were also asked about their organizations’ commitment to Indigenous rights and well-being. While 70% of respondents answered “Yes” to the question, “Does your organization prioritize Indigenous well-being, sovereignty, and/or reconciliation?”, only 19% answered “Yes” to the question “Does your organization explicitly address supporting Indigenous peoples in its bylaws, mission statement, or formal policies?” Thus, while there is an intent to prioritize Indigenous issues among CLTs, it has yet to be significantly operationalized in most cases.

Among those that are doing tangible work in supporting Indigenous peoples, actions taken include exempting Indigenous people from local residency requirements for an affordable housing project; implementing a trauma-informed approach to housing; and supporting land-based teachings and Indigenous youth housing.

Unincorporated Group Characteristics

Unincorporated respondents were asked for the year in which they began organizing to form a CLT; all but one respondent indicated that they had begun in 2021 or 2022, and the average and median year organizing began was 2021 (n = 5).

Respondents were asked about the planned service area for their organization; two organizations responded that they would serve the municipality, two responded that they would serve a particular neighbourhood, and one responded that they would serve more than one municipality.

Unincorporated groups were also asked about the non-residential activities they are already carrying out or that they intend to carry out within the next 1 to 5 years. Respondents indicated that they intend to carry out a wide range of activities (n = 4); activities already being undertaken by these groups include community organizing (25%), community building (25%), community planning/engagement/research (50%), and policy advocacy (50%).

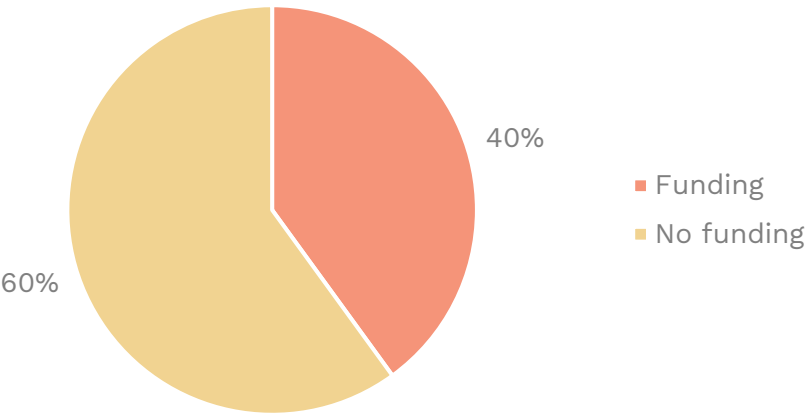
When asked about the types of property the groups intend to acquire or develop, 80% responded that they would develop or acquire mixed-use properties (n = 5). All indicated intentions to develop or acquire property for residential uses, with three indicating they are exploring affordable homeownership options and three intending to develop or acquire affordable rental properties. Other planned uses for CLT land include co-op housing, cultural spaces, and social enterprises.

Respondents were also asked about the population(s) they intend to serve (n = 5). The majority (60%) of respondents intend to serve particular equity-deserving communities: two groups intend to serve the Black populations in their historic African Nova Scotian communities, while one group intends to serve the urban Indigenous population within their municipality. The remaining two respondents have a broad focus on serving low-income communities and also indicated that different projects may serve different groups.

Respondents were asked about any planned or existing partnerships with other organizations, including the public sector. Three indicated that they are partnered with, or intend to partner with, the municipality, as well as other non-profit and community organizations, while two respondents have yet to decide which partnerships they will pursue.

Of the five respondents, only two (40%) are currently in receipt of funding, both from the 2021 round of the CMHC Demonstrations Initiative.

Figure 16: Share of Unincorporated Groups by Funding Status (n = 5)



Respondents were asked about the next steps for their groups, beyond incorporating. Next steps included educating the broader community on the CLT model, conducting community and stakeholder engagement, developing bylaws and a governance model, and accessing funding for CLT operations and capital projects.

Residential Portfolios

General Portfolio Characteristics

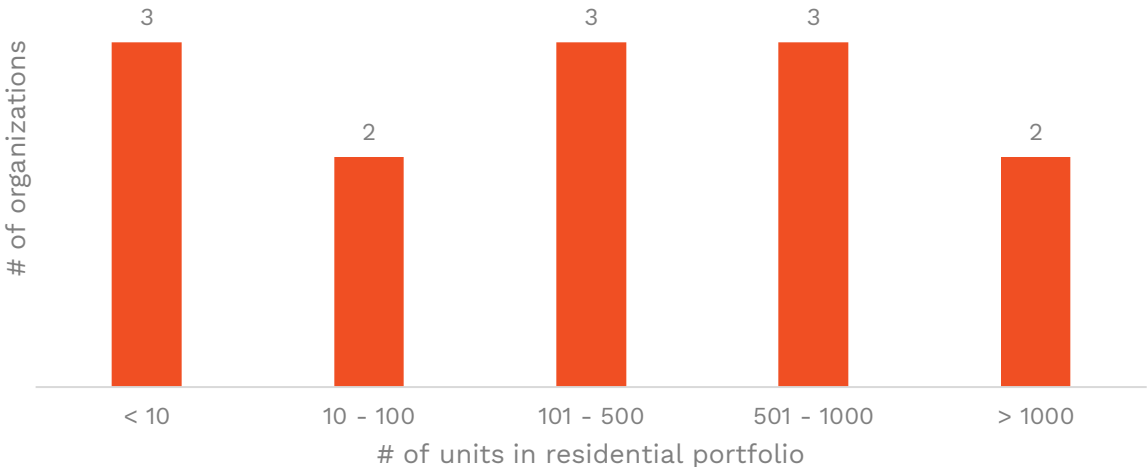
Incorporated organizations were asked about what types of property, if any, they own, and for what purposes (n = 27). Of these organizations, six (26%) own land for partially or exclusively non-residential purposes, which included commercial rental units within housing developments (four organizations) and spaces for programming and events (three organizations); only one respondent held property for exclusively non-residential uses.

Nearly half (44%, or 12) of respondents have at least one completed residential unit on land owned or governed by the CLT. The remaining 15 respondents include at least 6 (40%) that own property but do not yet have a completed residential unit; some are actively in the process of developing, with one organization expected to complete their first 32-unit development by the end of 2024.

Of the organizations that did not respond to the survey, one is confirmed to have completed residential units and verified their unit counts via email; the others are believed not to have residential units, based on publicly available information, although this has not been able to be confirmed.

The 13 CLTs confirmed to have residential units on their land hold an estimated total of 9,995 units, with an average of 769 units and a median of 204. Figure 17 below shows the wide spread of residential portfolio size among Canadian CLTs.

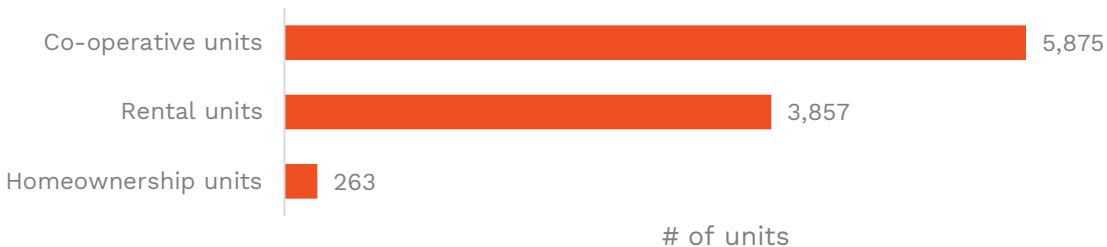
Figure 17: Number of Organizations by Residential Portfolio Size (n = 13)



The majority (59%) of CLT units were co-operative units and are therefore managed by their respective housing co-operatives. Rental units accounted for the second largest number of units or 39% of total CLT units. Homeownership units was the

least common type of residential units for Canadian CLTs, accounting for 263 units (3% of the total).

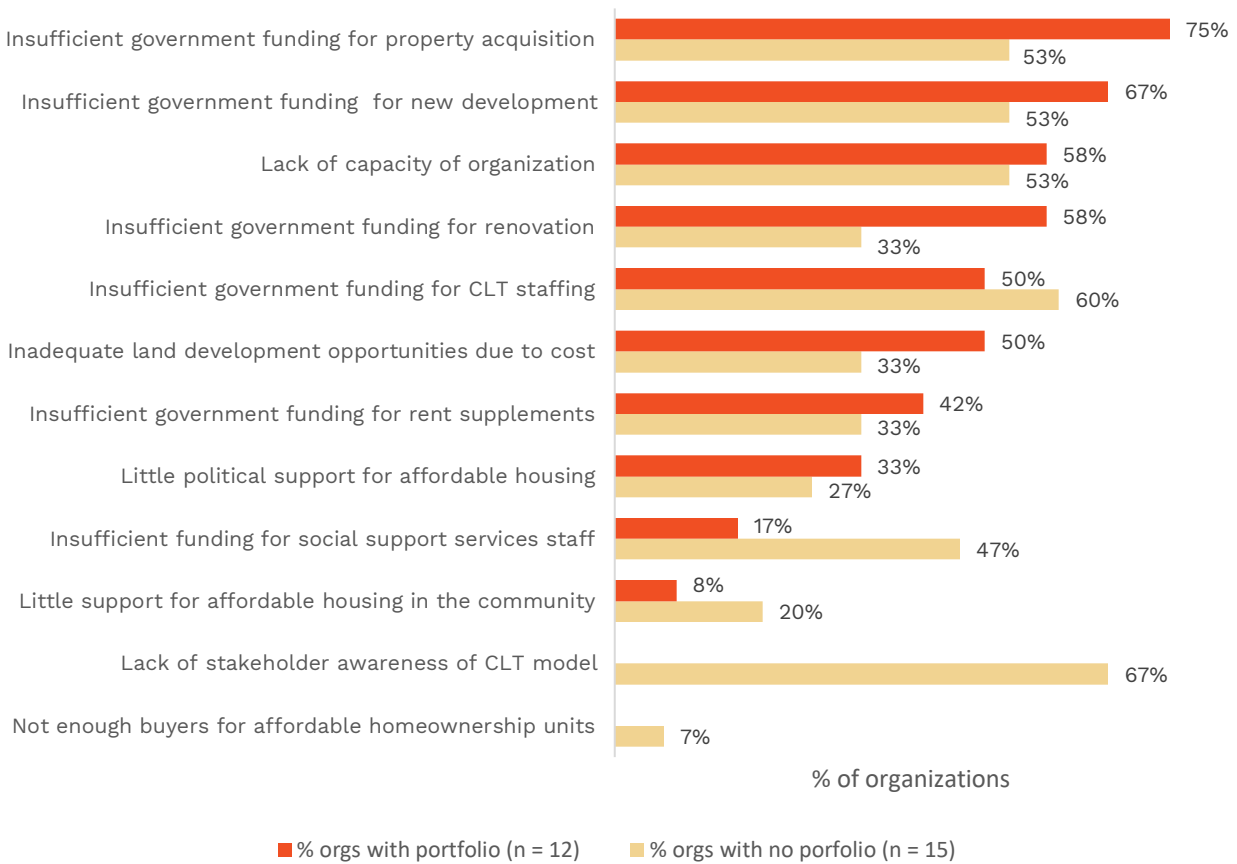
Figure 18: Number of Total Residential Units by Unit Type (n = 13)



Incorporated respondents were asked about barriers to acquiring or developing new units (n = 27). As shown in Figure 18, organizations without an existing portfolio indicated different barriers to developing new units compared to organizations that already have completed residential units: for example, 67% indicated a lack of stakeholder awareness of the CLT model as a barrier, while no organizations with a residential portfolio reported this as a barrier. Respondents without completed residential units were also more likely to highlight funding for social support services staff (47%, compared to 17%) as a barrier.

Respondents with completed residential units were more likely to emphasize insufficient funding for acquisition (75%) as well as renovation or retrofitting (67%) as a barrier to growing their portfolios. Lack of organizational capacity and insufficient funding for CLT staffing were important barriers for over half of respondents, regardless of if they held units or not.

Figure 18: Share of Organizations by Barriers to Acquiring or Developing New Units



The following analysis refers to a section of the survey completed in full by only 8 of the 12 respondents that have completed residential units.² These questions applied to organizations that had rental units, co-op units, homeownership units, or a combination of these.

Respondents were asked about the geographic location of their residential properties. As shown in Table 5 below, the majority of organizations own residential property in an urban area (75%). All three of the organizations with units in suburban areas also have units in urban areas, while both of the organizations with units in rural areas operate exclusively in rural areas.

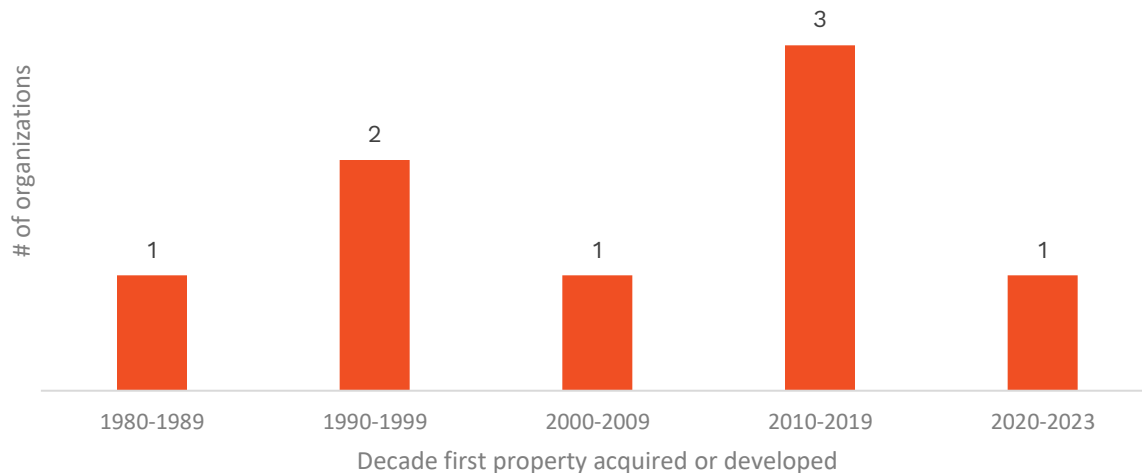
² A survey design shortcoming meant that four organizations that do have residential units did not respond to follow up questions about those units.

Table 5: Location of Residential Properties (n = 8)

Residential Property Location	# of Organizations
Urban	6
Suburban	3
Rural	2

Respondents were asked when their organization first developed or acquired residential property. The majority of respondents (63%) first acquired property in the 2000s or later.

Figure 19: Number of Organizations by Decade of First Residential Property Acquisition (n = 8)



Respondents were asked how they acquired or developed the residential properties they own (n = 8); respondents were able to select multiple options as different methods may have been used for different properties within their portfolios. As shown in Table 6, the majority of organizations purchased existing buildings from private owners (75%), while half have developed new buildings (50%).

Table 6: Number of Organizations by Method of Acquisition or Development (n = 8)

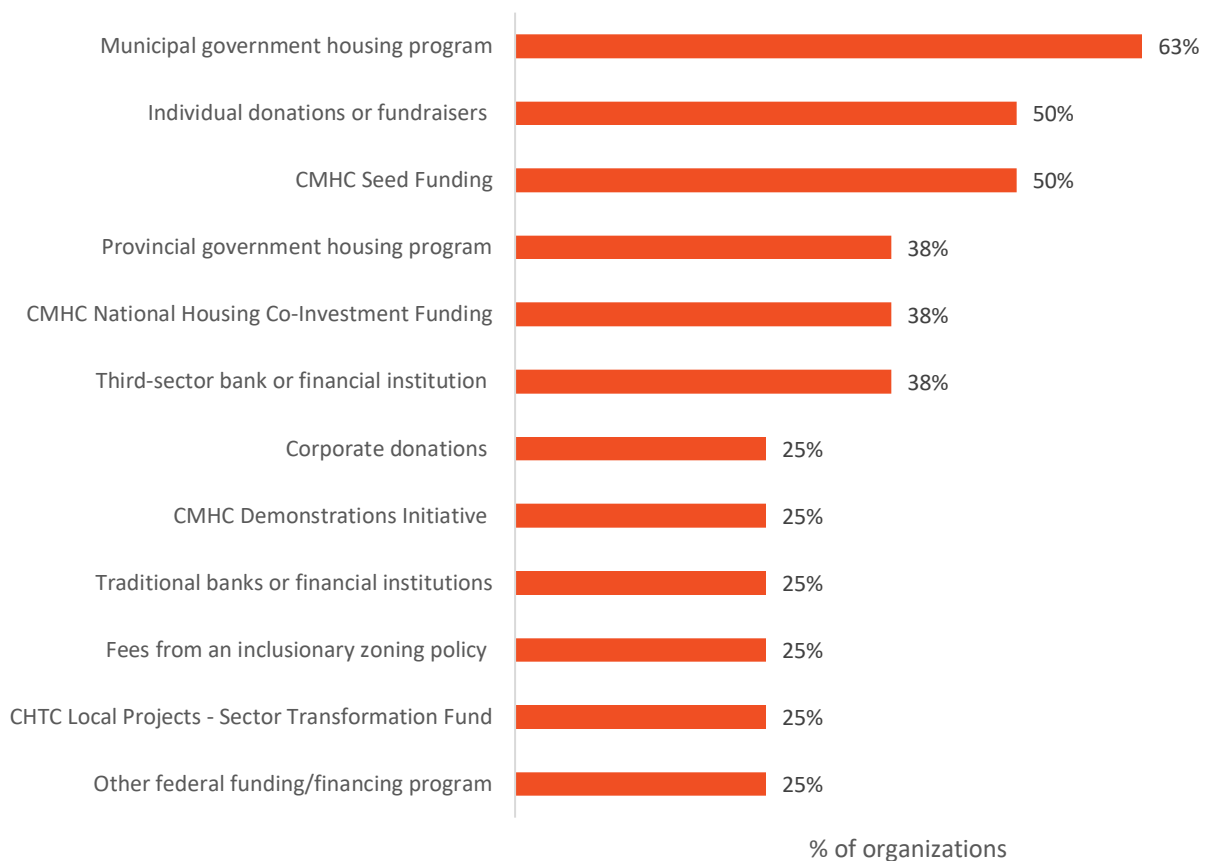
Method of Acquisition/Development	# of Organizations
Purchased existing buildings from private owners	6
Developed new construction	4
Received discounted land or properties from a land bank or governmental entity	3
Purchased existing buildings from a public entity (including arm's length corporations owned by a public government), non-profit organization, or co-operative	3
Partnered with for-profit developers on acquisition, rehab, or new construction	2
Receiving donated land or properties from private individuals or corporations	1
Received (free of cost) homes or contracted to manage homes for a provincial or municipal entity	1

Respondents were asked about funding sources used to acquire or develop their existing and planned residential properties; Figure 21 below shows the 12 most important funding sources reported by respondents.³ The most common funding source indicated for existing units was a municipal housing program or one-time investment (63%). Other common funding sources for existing donations and fundraisers (50%) and CMHC Seed Funding (50%). At least nine of twelve organizations with existing residential portfolios indicated they had accessed funding for new residential units.

Provincial government housing programs, CMHC's National Housing Co-Investment Fund, third-sector financial institutions, and other federal funding or financing programs were also commonly accessed sources (38% each). Other funding sources that were selected by only one organization included the Investment Readiness Program, CHTC Community-Based Tenant Initiative, federal or provincial rent-related social assistance programs, and the Ministry of Health.

³ Note that for CLTs that have acquired co-operative properties, respondents were not able to provide a complete list of funding programs accessed for the development of those properties.

Figure 20: Share of Organizations by Top 12 Funding Sources for Residential Portfolios (Existing or In-Development) (n = 8)



Respondents with an existing residential portfolio were asked about their organizations' funding sources in relation to operating expenses (n = 8). Five organizations indicated that 81%-100% of their operating budget is covered by internally generated sources (for example, rent or membership fees, but excluding fundraising or donations). One organization indicated that only 1-20% of their operating budget was covered internally, while two respondents were not able to respond to this question.

Rental Portfolios

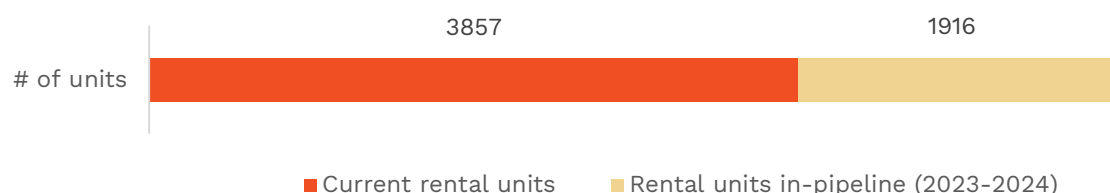
Respondents were asked about the number of existing and planned (expected to be completed by the end of 2024) rental units in their portfolios. For non-respondents to the portfolio section, we relied on public information verified by organization staff. There are currently 3,857 rental units managed or owned by CLTs in Canada.

The planned acquisition or development of 1,916 units in 2023-2024 will lead to a 50% increase in the number of rental units on CLT-owned property in Canada. It is

notable that 95% of these units will be developed or acquired by one CLT: the Community Land Trust Foundation of BC.

Two respondents indicated additional development plans which account for an additional 1,631 units to be completed in 2025 or later.

Figure 21: Number of Rental Units (Current and in Pipeline) (n = 10)



Respondents with rental housing portfolios were asked about the number of units, both complete and in development (to be completed by end of 2024), in different dwelling types (n = 6). Based on the six full survey respondents, the majority of existing rental units (96%) are in multi-unit buildings with three or more units.

Respondents indicated different approaches for managing their rental properties (n = 6). Two respondents directly managed all of their rental properties. One respondent leased their properties to an organization to manage them. One organization contracted a property management company for the management of their rental property. Two respondents with larger rental portfolios had a mix of directly managed and leased properties.

For organizations with lease arrangements for their rental properties (n = 3), the lease terms ranged from five to fifty years. Among these three organizations, the terms and form of the lease varied, with one using a net lease with an affordability covenant, another using a ground lease and sublease arrangement, and another using a master lease.

Five out of six organizations' rental portfolios consisted entirely of affordable units. The remaining respondent had a mix of affordable and market rental units.

Most organizations (67%) set their definition of affordability based on average or median market rent in their communities as shown in Table 7 below.

Table 7: Definitions of Affordability for Rental Units (n = 6)

Affordability Definition	# of Organizations
Relative to average or median market rent in CMA	4
Based on low-income cut-off	1
Varied based on properties	1

Respondents forwarded different reasonings for their methods of defining affordability. Two respondents with less than ten units based their rent on the breakeven cost of operating the properties. Four respondents indicated funding agreements as the deciding factor in their definition of affordable rents. Two respondents indicated that a significant number of their tenants receive a rental subsidy to deepen the affordability of their units.

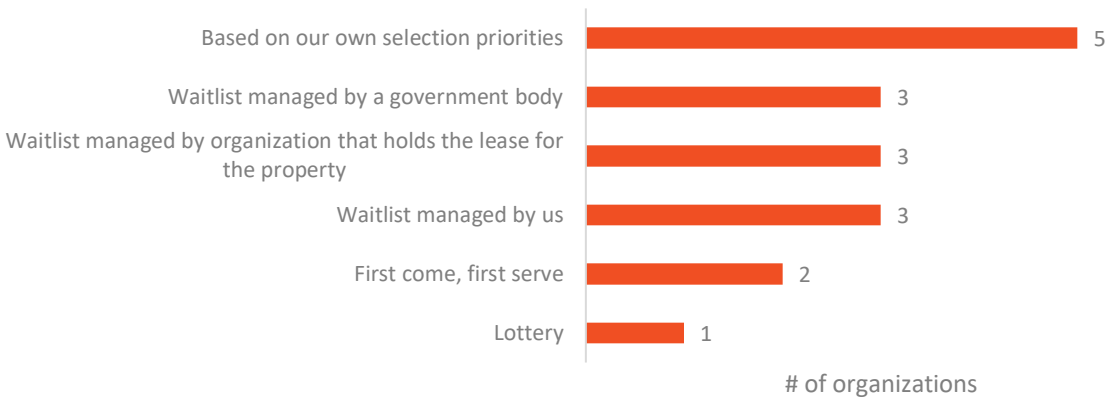
Respondents indicated a variety of term lengths for the affordability of their rental units, as shown in Table 8. The most common terms indicated were in perpetuity or a 99-year term (67%).

Table 8: Length of Affordability Term for Rental Units (n = 6)

Length of Affordability Term	# of Organizations
In perpetuity	2
99 years	2
10-35 years	1
None	1

Respondents were asked how new tenants for their affordable rental units are selected. Respondents indicated a mix of priorities, including their own selection priorities and wait lists managed by the CLT, their property manager or their municipality. The two respondents with fewer than ten units did not use a formal waitlist system, instead opting for a first-come, first-serve system based on their own priorities.

Figure 22: Number of Organizations by New Tenant Selection Method (n = 6)



Respondents were asked if they prioritize potential residents based on demographic factors. Five out of the six organizations prioritize residents based on income and experience of homelessness. The one organization that did not prioritize income or lack of access to housing operated a single rental unit. Common priorities for tenant selection included women fleeing family violence and three prioritized household size, seniors, existing local residency, Indigenous people, 2SLGBTQIA+ people, and racialized people for their resident selection.

Table 9: Resident Selection Criteria for Affordable Rental Units (n = 6)

Resident Selection Criteria	# of Organizations
Income and affordability	5
People experiencing homelessness	5
Women fleeing family violence	4
Household size	3
Seniors	3
Existing local residency	3
Indigenous peoples	3
2SLGBTQIA+ people	3
Racialized groups	3
Previous local residency	2
Young adults	2
Recent immigrants and/or refugees	2
Job location	1
Veterans	1
Other	1

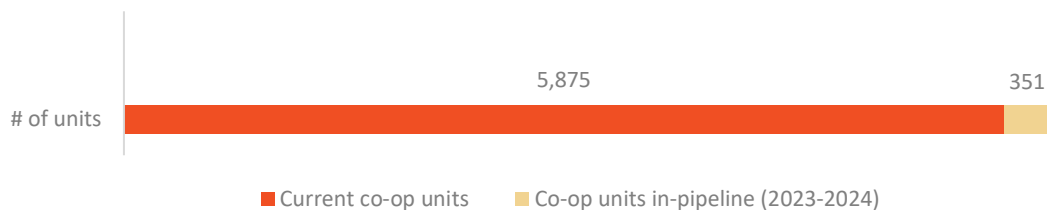
Co-operative Portfolios

Two respondents indicated their community land trusts had co-operative housing units on land owned by the CLT. One other respondent indicated their land is owned by the respective housing co-operatives which manage the units, and not the community land trust; in this case, the CLT provides overarching governance of the housing co-operatives and other land-based assets.

None of these three respondents operate the housing co-operatives directly; as such, they were able to provide limited information on the management of these properties.

All three CLTs had exclusively zero equity co-operatives in their portfolio⁴. There are a total of 5,875 zero equity co-operative units in the respondents' portfolios, with a further 351 units (a 6.4% increase) expected to be added by the end of 2024.

Figure 23: Total Co-operative Units - Current and In Pipeline (n = 3)



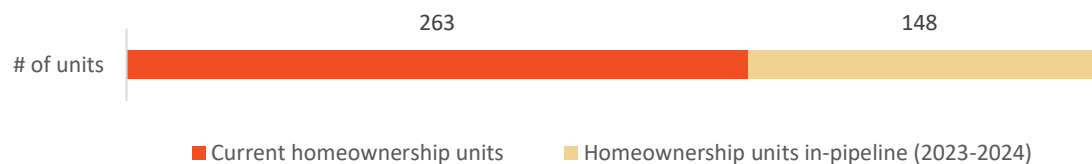
⁴ Zero or no-equity co-ops are the most common form of co-operative housing in Canada, in which residents lease their unit from the co-operative rather than purchasing a share.

Affordable Homeownership Portfolios

As explained in the Methodology section above, no survey respondents indicated that they have affordable homeownership/shared equity units that meet the criteria provided. However, at least two respondents are known to have completed homeownership units on CLT land, while a further two organizations (one respondent and one non-respondent) are known to have homeownership units in the pipeline that are expected to be complete by the end of 2024.⁵ It is believed that the survey did not capture details on these homeownership units because of a combination of survey design limitations and user error.

Figure 24 below summarizes the known complete and in-development homeownership units on CLT land; note that these totals are based on a broad definition of CLT homeownership that includes organizations who did not place restrictions on affordability or income at time of resale. All but one of the existing homeownership units belong to one CLT, the Toronto Island Residential Land Trust.

Figure 24: Total Homeownership Units - Current and In Pipeline (n = 4)



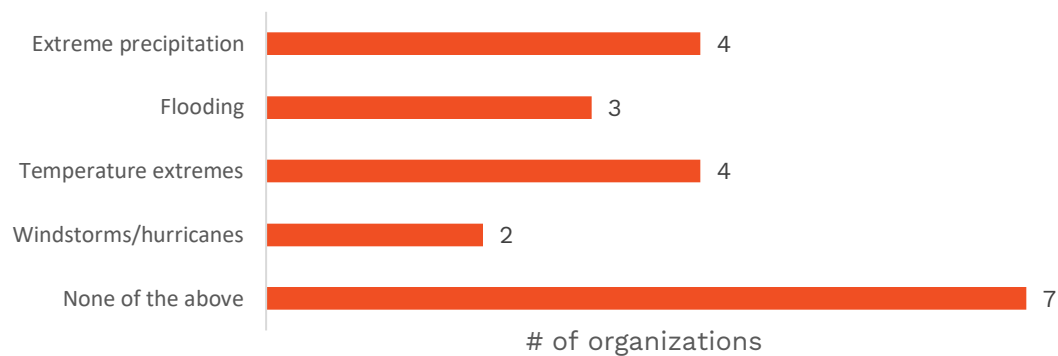
⁵ A further two CLTs are believed to have between two to four owner-occupied homes on CLT-owned land; in both cases, the CLT land is primarily used for agricultural purposes. However, the precise homeownership arrangements and number of units are not known and have not been able to be confirmed with the organizations. They are therefore excluded from the total unit calculations.

Climate Change & CLTs

Respondents from incorporated organizations were asked about the effects of climate change on their communities, and how they are working to increase climate resilience and improve energy efficiency.

Respondents that have residential portfolios or have property that will be developed for that purpose were asked about experiences with climate change-related weather events; the results are shown in Figure 25. More than half (56%) of property-owning respondents indicated that their properties had experienced extreme weather events believed to be related to climate change. The most commonly reported weather events were extreme precipitation, flooding, and extreme temperatures.

Figure 25: Number of Organizations by Climate Change-Related Weather Events Affecting CLT Properties (n = 16)



Respondents (incorporated organizations with and without residential portfolios) were asked whether their organization sees climate change as a priority or frequent topic of discussion (n = 26). Over a third (38%) of respondents indicated that climate change was either never or rarely discussed by residents or members of their organization. Less than half (42%) of respondents indicated that climate change is sometimes discussed, and five organizations (20%) responded that climate change is a frequent topic of discussion and is actively being addressed.

Respondents were asked about actions taken by their organization for climate adaptation and mitigation (n = 26). As shown in Table 10 below, the most frequent strategies used were energy efficiency measures (48%), green plantings (43%), renewable energy (26%), sustainable modes of transportation (26%), and green water infrastructure (26%).

Table 10: Climate Change Adaptation and Mitigation Strategies Taken by Respondents (n = 26)

Climate Change Adaptation and Mitigation Strategies	# of Organizations
Energy efficiency measures (Net-Zero Energy Standards Adoption, Passive Design Standards, LEED Standards)	11
Green plantings (trees, green roofs, urban agriculture)	10
Renewable energy (solar, wind, or ground source energy)	6
Electric vehicles or transit connections	6
Green water infrastructure (Stormwater treatment/retention or storage, rain gardens, permeable pavements, wetlands restoration)	6
Allocating savings in case of disaster need	3
Flood, wind, or fireproofing buildings (home elevation, HVAC elevation, barriers, ecological restoration)	2
Administering disaster recovery funds	1
Increasing number of units due to disaster-related in-migration	1
Connecting clients/residents to disaster recovery services or support	1
None of the above	6

Respondents were also asked whether their organization was planning on taking actions to address their vulnerability to the effects of climate change. Most respondents saw action on climate change adaptation (87%) or mitigation (78%) as a priority for their organization.

Respondents were asked what barriers to climate action their organization experiences (n = 26). Common barriers included funding for planning (43%), implementation (39%), staff and leadership capacity (30%), and available funding not being geared to their organizational structure (17%). Around a third of organizations (35%) indicated that they did not face barriers to action on climate change adaptation or mitigation. Among organizations that had not yet taken action on climate change, some indicated that they were too early in their property development to have implemented any of the named strategies (26%).

Discussion

This survey underscores the diversity in organizational size and structure in the Canadian CLT sector. Key factors in organizational structure – staff composition, board structure, and membership – varied widely based on an organization’s stage of development, its operating model, and community characteristics, demonstrating how organizations have been adapting the CLT model to suit their community’s needs. Below, to stimulate further discussion among CLT sector actors and enablers, we highlight key survey findings.

The Canadian CLT Landscape

Table 11: Residential Unit Portfolio of Total CLT Population (n = 13)

	Current Units	In Pipeline (2023-2024)	Total
Total co-op units	5,875	351	6,226
Total rental units	3,857	1,916	5,773
Total homeownership units	263	116	379
	9,995	2,383	12,378

- **The number of residential units on CLT-owned land in Canada total approximately 9,995, as shown in Table 11 above.** Based on reported developments in the pipeline, the total number of units protected from the speculative housing market by the CLT sector is expected to grow to at least 12,378 units by the end of 2024, which would be an increase of 24%.
- **Of the 41 total CLTs in Canada, at least 13 organizations (32%) have an existing residential portfolio consisting of affordable rental, co-operative, or homeownership units.** Three of these organizations are responsible for only one residential unit; the average number of units among organizations with a residential portfolio is 769.
- **More than half (59%) of current CLT units are managed by zero-equity housing co-operatives, with an average portfolio size of 1,958 co-op units across three co-operative land trusts.** Co-operative land trusts are also major contributors to the growth of the CLT sector, with one co-operative land trust accounting for 100% of all planned new co-op units and 80% of all new units for 2023/2024.
- **Analysis of the board structures of respondents reveals that while most have incorporated aspects of the traditional CLT governance model, a minority (15%) are using an explicitly tripartite board structure.** Community representation is still a priority for most CLTs, but the traditional tripartite board model has been adapted to suit different community contexts, with other criteria being used to allocate board seats – for example, belonging to a particular equity-deserving group or experience of displacement.

Strengths

- The community land trust model is widespread across Canada and continually expanding. **53% of Canadians live in a census metropolitan area (CMA) with a community land trust and 27% of CMAs have at least one CLT operating.**
- **Most respondents (81%) either have, or plan to set up, a membership that is open to those living or working in their service area.** An open membership is an important tool used by many CLTs to ensure land acquired is used for community benefit, in perpetuity. CLTs have created different categories of membership to suit their needs and to galvanize support.
- Overall, CLT boards, staff, and membership are diverse, demonstrating that in many cases CLTs are being led and supported by people from equity-deserving communities. **The majority (59%) of total board seats are filled by women or gender-diverse individuals, and BIPOC employees represent 43% of the total reported members of staff.** However, there is more work to be done in this area: 30% of board seats are filled by BIPOC directors, and only 20% of organizations' top administrators identify as BIPOC.
- The survey revealed that Canadian CLTs are prioritizing racial justice and reconciliation with Indigenous peoples. **A number of groups, particularly newly incorporated and unincorporated groups, are led by and intend to primarily serve Black or Indigenous communities.** Among CLTs that are not BIPOC-led, some respondents highlighted tangible actions being taken to promote racial justice and reconciliation. Responses reveal a need for further research on the use of the CLT model to support reconciliation and racial justice.
- **There is continual demand for CLT-operated residential units, with all CLTs with rental portfolios indicating excess demand for their housing.** CLTs frequently partnered with municipalities to place residents from social housing waitlists into available units.
- **75% of organizations' rental portfolios consisted entirely of affordable units.** Organizations with mixed residential portfolios provided a mix of market, rental, and supportive units. CLTs play a key role in protecting housing affordability and removing housing from the speculative real estate market.
- **All CLTs with residential portfolios have a unique structure for managing or leasing their properties.** No two organizations had the same structure, highlighting the diversity of CLT's goals and organizational needs.
- **CLTs provide a wide range of services not directly related to their residential portfolios,** with the most common being community planning, engagement, and research (52%); policy advocacy (44%); and community organizing (44%). Some CLTs hold land for non-residential or mixed uses, enabling them to support affordable commercial, agricultural, and community spaces.

Challenges

- The survey highlights the need to fund early-stage CLTs. **Of the five respondents that are unincorporated, all are either currently unfunded or rely on funding that will end in early 2024.** Analysis of CLTs with residential portfolios show that they can reach a degree of financial sustainability. However, there is a need for operating funding to support newer CLTs in building the internal capacity to acquire and develop affordable housing; there is also a need for ongoing rental subsidies to provide deep affordability.
- CLTs identified **lack of government funding for property acquisition, new development, and staff as key barriers to their growth.** CLTs primarily rely on municipal governments, CMHC programs, and donations or fundraisers to fund new residential developments and acquisitions.
- **More than a third of incorporated respondents (37%) reported having no paid employees; among those with staff, the median number of total employees (part-time and full-time) was two.** Not all CLTs will require a large staff as properties may be directly managed by non-profit housing providers or by contracted property managers. However, the limited human resources available to most CLTs is likely a result of both the newness of many of these organizations – with 39% incorporated in or after 2021 – and the lack of operating funding available to CLTs. Many CLTs reported that volunteers are carrying out key organizational tasks; while this demonstrates deep community support, overreliance on unpaid labour puts the groups' sustainability at risk.
- While the shared equity model for CLTs has been one of the most prevalent models in the United States (Wang et al., 2023), the Canadian context looks quite different. **The survey included questions on shared equity and affordable homeownership units; no respondents had properties that met the criteria for this portfolio type, but two organizations that meet our definition of CLTs do have homeownership units on CLT-owned land.** In addition, some newer organizations indicated that they were in the process of developing shared equity or affordable homeownership units.
- The survey responses also indicate that while climate change and sustainability are key concerns for Canadian CLTs, most have little tangible action in this area with only 19% of CLTs actively discussing and planning strategies to address climate change. The main barriers to action highlighted by respondents are inadequate funding for either planning or implementation of climate mitigation and adaptation strategies.

Recommendations

Based on these challenges, as well as the opportunities present within the CLT sector, CNCLT recommends that the following actions be taken by key stakeholders, particularly federal, provincial, and municipal agencies and departments; foundations; and socially minded financial institutions.

Increased capital funding for acquisition, development, and renovation:

- CNCLT recommends that funders provide funding opportunities appropriate to CLT-led affordable homeownership development.
- CNCLT recommends that federal, provincial, and municipal governments provide funding for acquisition of existing rental housing. Funders should meaningfully engage with CLTs to better understand the specific funding needs of CLTs undertaking acquisition projects.
- CNCLT recommends that funding programs for co-operative housing development, including the forthcoming CMHC co-operative funding, be designed in alignment with the needs of the CLT sector.
- CNCLT recommends that funders support CLTs in planning and implementing retrofit activities within acquired rental properties, constructing high-efficiency buildings, and developing long-term climate resiliency plans.

Ongoing funding to support CLT organizational development and knowledge-sharing:

- CNCLT recommends that funders provide grants that support CLT organizational development, both directly to start-up CLTs as well as by funding organizations like CNCLT that deliver sector-informed support, facilitate knowledge mobilization, and coordinate peer-to-peer learning.
- CNCLT recommends that funders support CNCLT in developing support services and case studies to inform future affordable homeownership projects.
- CNCLT recommends that funders support the creation of sector-specific resources and support that will help CLTs successfully acquire and steward affordable housing.
- CNCLT recommends that funders provide reliable operating funding to enable early-stage CLTs to hire staff and increase internal capacity.
- CNCLT recommends that funders support CLTs led by racialized communities by providing opportunities and funding for BIPOC leadership development.
- CNCLT recommends that funders support knowledge mobilization activities to document, disseminate, encourage promising practices to forward racial equity and justice within CLTs.
- CNCLT recommends that funders support CLTs led by racialized communities by providing reliable financial support for organizational development, peer-to-peer learning, and technical support services.

- CNCLT recommends funders engage directly with Indigenous-led CLT projects to ensure proposed supports align the federal government's commit to achieving reconciliation with Indigenous peoples and other racial equity goals.

The CLT sector in Canada has high potential to develop, protect, and steward affordable housing in a way that is responsive to diverse communities' housing and social needs. Increased funding for capital projects, combined with organizational development support and initiatives to raise awareness of the CLT model, will help ensure the continued growth of the sector.

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