Forming a New Housing Co-op (Attached to New Housing under Training)

Training and technical assistance is one of the most important factors for a successful cooperative. New co-ops must establish a solid foundation and prepare new members to take on the challenges of operating residential housing. Many co-op members have never owned a home and have not had the opportunity to learn how to manage property. BACLT offers an introductory workshop series for tenant groups wanting to buy their property and become a co-op, we explain the options, opportunities, and challenges in moving towards a resident controlled housing model, and prepare residents to take on the full responsibilities of ownership.

1. Intro to Co-ops and Community Land Trusts - What’s involved in starting a co-op? Overview of drawing up bylaws and other legal documents, incorporation, developing a co-op management plan, developing budgets and purchasing co-op shares. This workshop can help you decide if you want to form a co-op.
2. Meeting Skills – How to develop a common language among diverse households. Includes basic meeting guidelines and facilitation practices and prepares residents to work together to form a successful co-op and develop a decision-making process.
3. Operating Rules - Using a model set of rules, we develop a basic set of operating Rules for the co-op. This workshop involves problem solving exercises that can reveal the preferences and priorities of co-op members.
4. Co-op Legal Documents – How to develop and review co-op legal documents, including Bylaws, Articles of Incorporation, Occupancy Agreement and Ground Lease. Purpose, history and contents of the documents as well as the obligations they require.
5. Co-op Finances and Budgeting – Teaching members to develop and revise an Annual Operating Budget to meet the co-op’s needs, to create and maintain essential financial reserves, standard co-op bookkeeping and how to keep members informed about finances.

6. Maintenance Planning and Budgeting – Training members to schedule and budget for preventive maintenance and major replacements, maintenance responsibilities for individuals and the co-op, how to select contractors to carry out repairs, how to set up reserves for long-term property maintenance.

7. Marketing and Member Selection - Developing a process to select new members, how to conduct interviews, and how to choose a new member who is right for your co-op. Review of requirements of fair housing law and resident selection criteria.

8. New Member Orientation– How do you integrate new members successfully into the co-op? How can you encourage new members to participate fully in running the co-op? How do you allow the community to grow and change to reflect its new membership.

9. Increasing Membership Participation – Starting a new co-op requires a lot of work. Are all the residents involved in this effort? This interactive workshop helps determine barriers and brainstorms ways to overcome them.

10. Board of Director’s Training – Basic roles, responsibilities, and processes the Board of Directors of your co-op will need to know. Includes education on legal duties and functions, as well as tools for making board meetings more efficient, productive and democratic.

11. Officer Training Management duties vary in different co-ops. These trainings offer hands-on training for each officer, cover the basic skills needed to maintain a functioning co-op and can be a benefit for one or more board members:
   1. President & Vice-President, or ‘Chair/Facilitator’: meeting facilitation, providing leadership and direction, preparing agendas.
   2. Treasurer: financial responsibilities, paying co-op’s bills and keeping the checkbook balanced, income taxes, standard co-op bookkeeping and preparing financial reports and budgets.
   3. Secretary: note taking, record keeping, maintaining correspondence.
   4. Maintenance Coordinator: basic maintenance skills, planning for repairs and capital improvements, hiring contractors, record keeping.

12. Co-op Elections Learn the basics about electing a board of directors. There are state laws that can affect co-op elections. This workshop will orient the board to basic election procedures. BACLT can provide training.
to conduct elections, and provide an experienced Election Inspector to perform the services.

13. Managing the Manager/Management Company Most co-ops with more than 25 units have some paid staff. This can be done by hiring an individual to serve as manager or hiring a management company. It is important to have a clear process for selecting the manager and a clear set of duties for both the manager and the board. We will help the board determine the role they play and the tools they need to guide the manager.

Workshops and Technical Assistance are offered on a sliding scale basis. Some financial assistance may be available.