

CULTIVATING CONNECTIONS:

Orienting New Members & Managing
Resales



Presented For
The Cohousing Association of the US

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Cherry Hill Cohousing
Amherst MA

Low Bowers

PDX Commons
Portland OR

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Seniors in Cohousing Committee
of CohoUS

Session Outline



Overview of the Process

- Market & Engage (covered in Part I w/ Heartwood Cohousing)
- Educate & Engage Future Members/Buyers
- Mentor New Members
- Managing Resales / Assisting Sellers

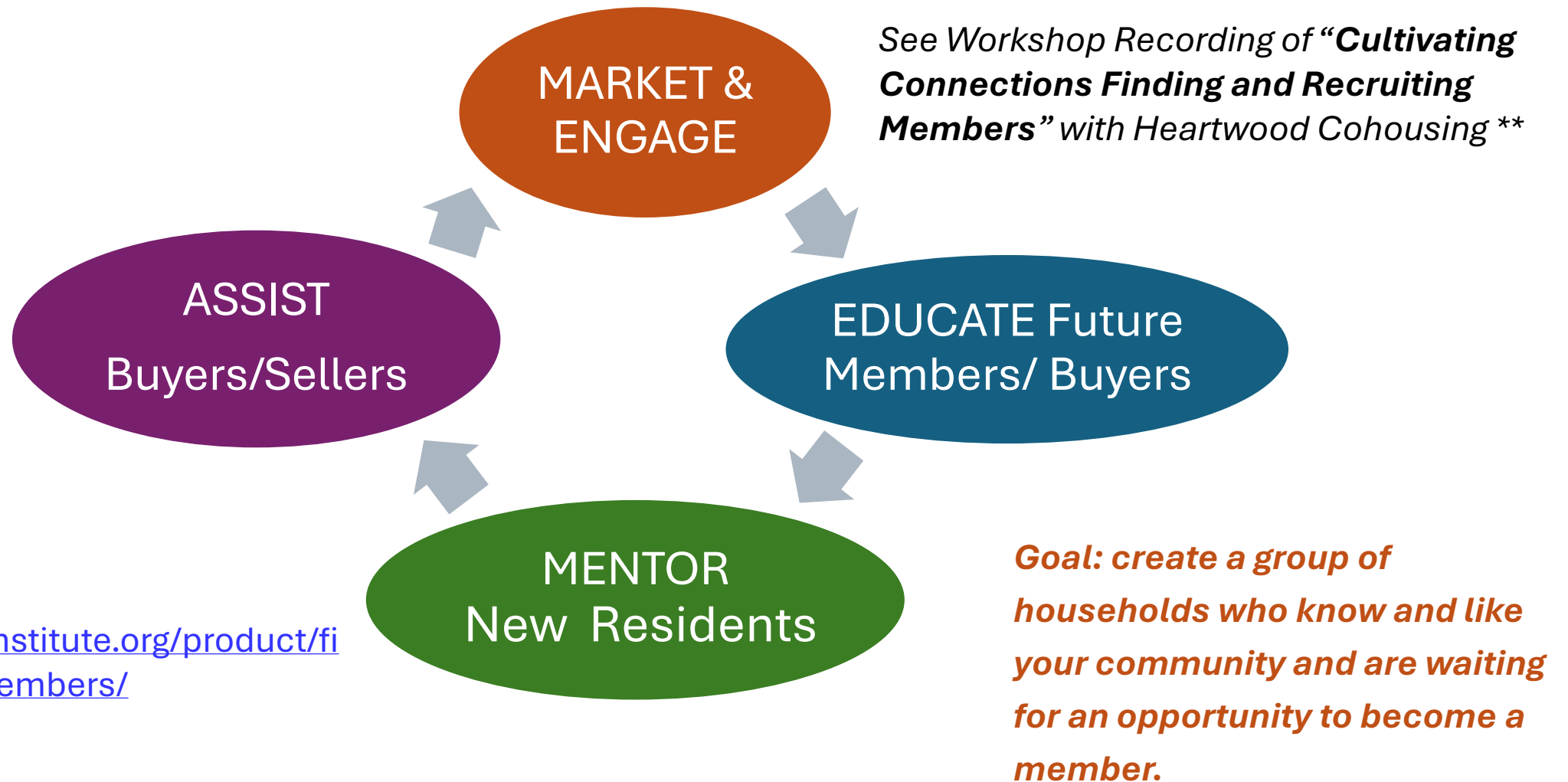
Community Examples

Challenges & Considerations

- FSBO/Community Assisted vs. Using a Realtor
- Ways to Clarify Expectations
 - Work participation
 - Level/type of assistance as we age
- Inheritance
- Rentals

Questions & Answers

ENGAGE NEW & FUTURE MEMBERS... An Ongoing Process



**
<https://cohousinginstitute.org/product/finding-recruiting-members/>

ENGAGE & EDUCATE: Informational Materials & Messaging

EDUCATE Future
Members/ Buyers

Mentoring
New
Residents

MARKET 7
ENGAGE

ASSIST
Buyers/Sellers

Elderberry (messaging) Example:

*We say, “**you don’t just buy a home, you buy a community.** For this reason, the Membership Committee encourages interested couples and individuals to consider your commitment to community living as well as the financial and time responsibilities and your health needs. We provide **two sets of questions** for your use only — as tools to assess how well you might fit into cohousing at Elderberry.”*

<https://www.elderberrycohousing.com/living-together.html>

EDUCATE & ENGAGE: Informational Materials

EDUCATE
Future
Members/
Buyers

Coho Living is
NOT Assisted
Living

Elderberry Example: How to Become a Member

*“To live here you must first be a member. We invite you to read our [Membership Process](#). There are seven steps, including **visiting the community and becoming an Associate Member**. The annual, non-refundable Associate Membership fee is \$300. We also require **attending at least 1 business meeting, 1 workday plus social events**. so that you can meet with the Membership Committee, get to know current residents, and experience life here.”*

(strong messaging with visuals, text, and questionnaires)



ENGAGE & EDUCATE: YOUR WEBSITE

From Heartwood
Cohousing Website

Website Page: “Path to Membership”

- Requires all new members to complete the “Prospective Member Checklist” – outlines the minimum amount of exploration necessary to make a wise decision about joining the community.

Examples:

- Visiting the community
- Participating in community activities, meeting members, reading about cohousing
- Completing a questionnaire intended to spur reflection & contemplation
- Meeting w/the Membership Team to discuss the questionnaire

QUESTIONNAIRE AS ENGAGEMENT & EDUCATION TOOL

Prospective Member Questionnaire [reviewed w/ a Membership Team member]

1. What experiences have you had in any type of community settings?
2. How have those experiences influenced your interest in Heartwood Cohousing?
3. What are your fears or concerns about living in Heartwood Cohousing?
4. What are you most looking forward to about Heartwood Cohousing? What benefits do you hope to realize by living here?
5. What do you have to offer Heartwood Cohousing?
6. What will be your greatest personal growth challenges of living in community?
7. What is your response to our Vision and Values agreement and our Interpersonal Agreements?
8. Participation in community activities and work are important both for community vitality and for your integration into the community. In what ways can you imagine yourself participating?
9. While Bayfield offers some services, many job opportunities, kids' activities, and other 'city amenities' require going to Durango (about a ½ hour drive). How would our rural setting impact your life?



“HOMEWORK” TO PREPARE.... *Prospective Member Checklist*

- Read at least one of the two books listed about cohousing
- Complete Prospective Member Questionnaire & discuss with Membership Team member
- Read all Heartwood’s Agreements
- Attend a community meeting and at least one other function-meal, potluck, team or committee meeting, work party
- Chat with at least 8 current members
- Sign “Declaration of Agreement & Commitment”



EMPHASIZING PARTICIPATION TO PROSPECTIVE MEMBERS

Highline Crossing: “Participation is at the heart of cohousing” *We have an expectation that all community members will participate in the maintenance and decision-making of the community.*

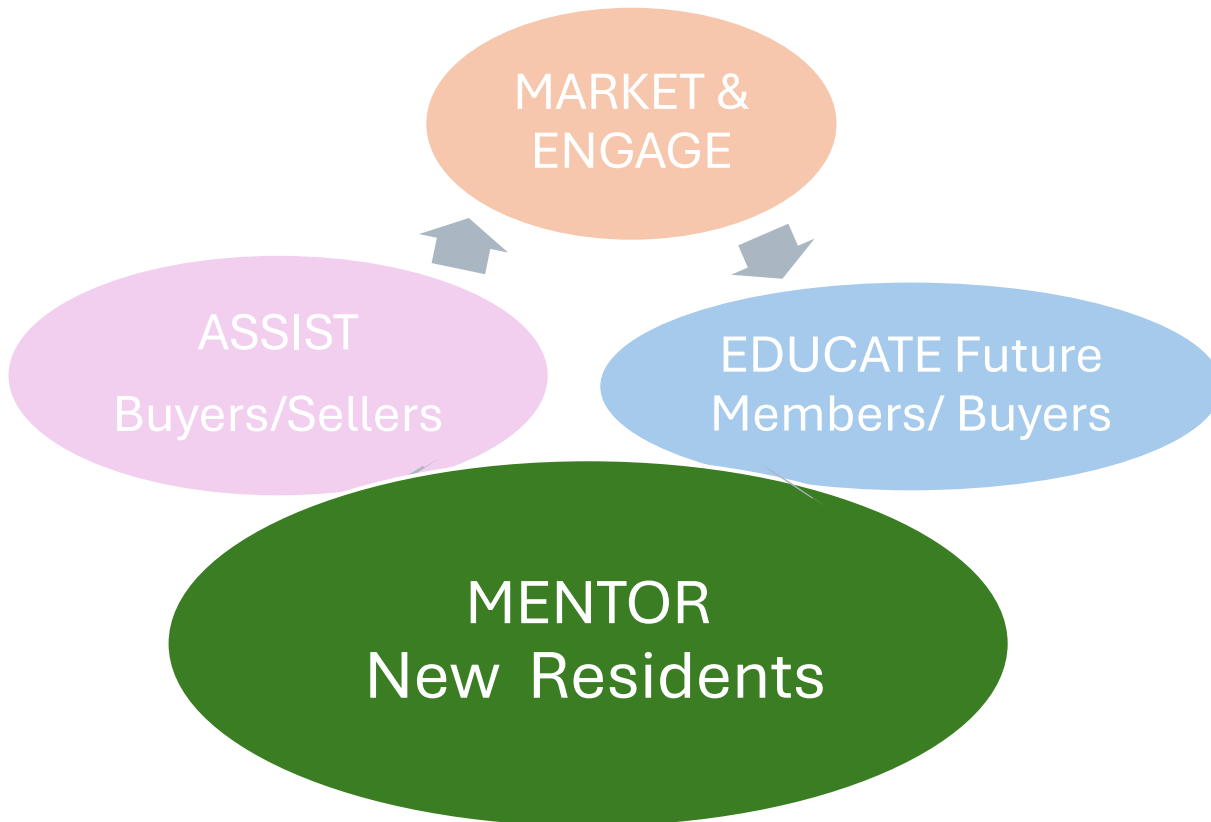
Elderspirit: “For all members to enjoy the benefit of community life, it is vital that everyone participates.”



Wolf Creek Lodge: “One of the cornerstones of cohousing is that the residents manage the operations of the community, make the decisions, and perform most of the work.”

Quimper Village: “We are committed to being friendly, cooperative, helping one another, and participating in the daily chores of the village.”

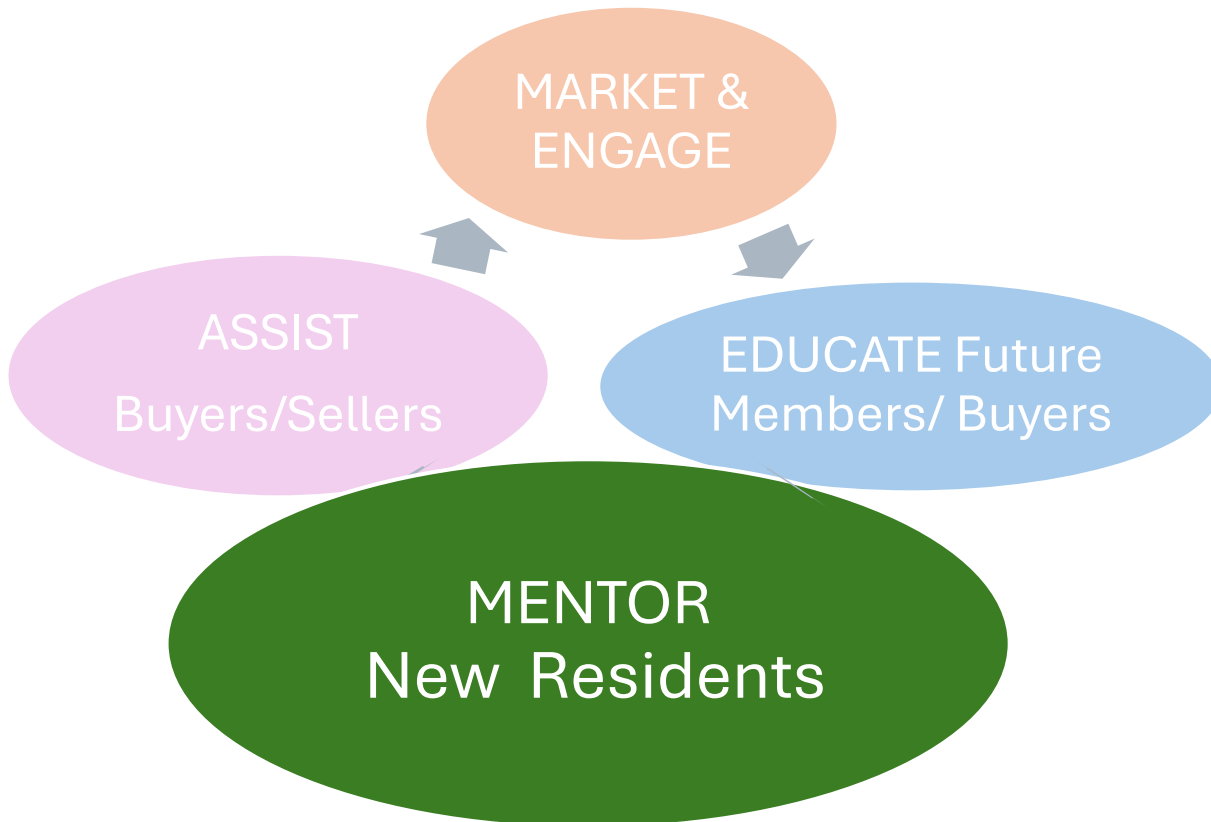
WELCOMING NEWCOMERS



Orient New Residents

- **Set up with a Buddy** (or two!)
- **Welcome at the next Full Circle/Plenary meeting**
- **New member profile in newsletter** (bio & photo)
- **Give [multiple] Tours of Facilities & How-to's**
- **Connect with work assignments** (HUB)
- **Conduct check-ins after 3 months & 6 months**

WELCOMING NEWCOMERS



Utilize a Transition Team

- Move in help
- Meal(s) during move-in period
- Help departing members (checklist)

Give Tour of Facilities & How-to's

- Meal system
- Laundry
- Recycling
- Compost
- Reserving spaces for events/gatherings
- Reserving guest rooms

Saying Goodbye to Departing Members

- Plan a ritual or gathering to bid farewell
- Conduct Exit interview with departing members

WELCOMING NEWCOMERS

First on the list is the ‘Orientation Checklist.’ You can print that out and use it to track your progress.

- [Orientation Checklist](#) (to be completed with the Orientation Coordinator)
- [Phone List](#) (Mosaic password required)
- [Community Meals Agreement](#)
- [Community Meals Guidelines](#)
- [Common House Orientation](#)
- [Communication Orientation](#)
- [Kids at Heartwood Orientation](#)
- [Privacy Orientation](#)
- [Financial Orientation](#)
- [Current HOA Assessments & Budget](#)
- [Meetings Orientation](#)
- [Common Facilities Orientation](#)
- [Workshop Orientation](#)
- [Greenhouse & Chickens Orientation](#)
- [How to Do Cool Projects at Heartwood](#)

https://www.heartwoodcohousing.com/uploads/1/2/2/4/122465736/231113_orientation_checklist.pdf

WELCOMING NEWCOMERS: PDX COMMONS Example

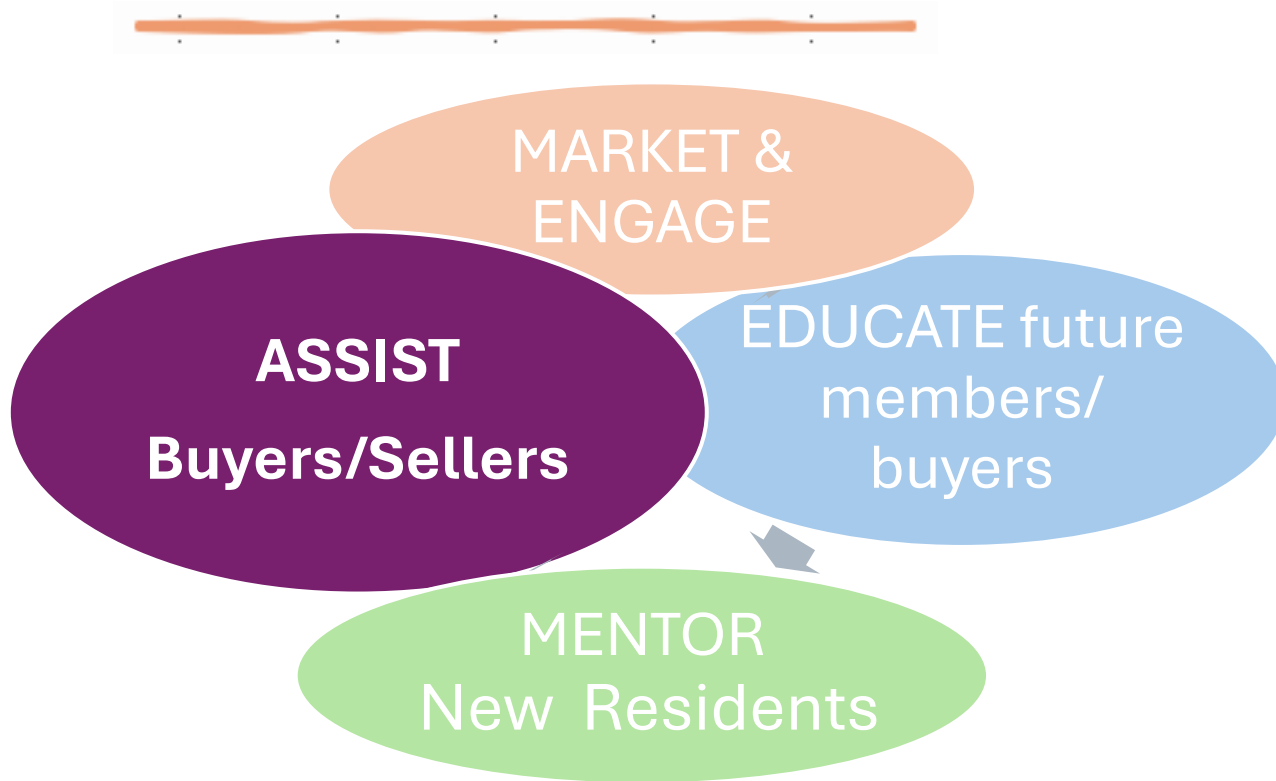
Welcome Checklist

| Pre-move/Transitional | Finances | Emergency Procedures/ Security |
|------------------------------|--|---------------------------------------|
| Buddy assignment | HOA fees/ reserve | First Aid Kit locations |
| Resident contact list | Current budget review | Fire Extinguisher and alarms |
| Keys/fob/code | Property taxes | Exits/Assembly |
| Garage/parking/fob | Communications | Fire Doors |
| HOA dues payment | White/hall bulletin boards | Water Containers |
| Insurance requirement/proof | Email lists – etiquette (PPT) | Theft/Intrusions – prevention |
| Office printer /shredder | Using Portal/Google Drive | Health/Care |
| Utility Sign-up | Gong | Mitzvah Squad |
| Community email access | Community Participation | Emergency Contacts form |
| Internet info | Review Participation HA | Illness/Accidents/Health |
| Architectural Review | Signing up for Job Share month 4 | DME loans available |
| Washer/drying options | Signing up for Committee/Subcommittees | Mutual Support Agreement |
| Mailing address | CoW attendance | Long Term Support Agreement |
| Bikes | Work parties | Pets |
| Storage cage assignment | Individual initiative | Vet recommendations |
| Pet Policy | Meals | |
| Moving aids/Permit Required | Signing up for a Meal | |
| Infectious Disease Policy | Volunteering at a Meal | |
| Gift and Loan Process | | |

| Immediate Need Information (first 48 hours) | Scheduling a Meal | Dogs |
|--|---|--------------------------------|
| Buddy Tour "lay of the land" | Social Activities | Potty area |
| PDXC locks demo | Spontaneous Activities | Poop digester |
| Schedule -meals, COW | Scheduled Activities | In Common Spaces |
| White board by elevator | Encourage participation | Dog-wash |
| Hall bulletin board | Common Space Use | K-9 Obedience helpful |
| List of owners/residents | How to reserve spaces | Cats |
| Emergency Contact Form | Quiet Hours | In Common Spaces |
| Laundry How To | Morning Breakfast nook | Walkway/balcony safety |
| New Unit Orientation: | Laundry Room How To | |
| Locking/unlocking door | Media Room How to | |
| Mini-split instructions | Exercise/Craft Room How to | Getting Around |
| Bathroom fans run constantly | Outdoor spaces | Cars and garage |
| Windows and coverings | Community Process | Transit |
| Water – pressure, temp, etc. | Organization chart | Bikes |
| Appliances | Consensus - thumbs | Walking the neighborhood |
| Smoke/fire alarms/sprinklers | Process for moving idea | Parks |
| Soundproofing | "Good meeting behavior" | Maintenance and Repairs |
| Doorway personalization | Transforming Conflict through Values team | The Maintenance Team |

HANDBOOK for NEW RESIDENTS of PDX COMMONS

PROACTIVE MANAGEMENT OF RESALES



CLARIFY ROLES & RESPONSIBILITIES

- For the seller
- For the community
- For the prospective buyer

COMMUNITY EXAMPLES

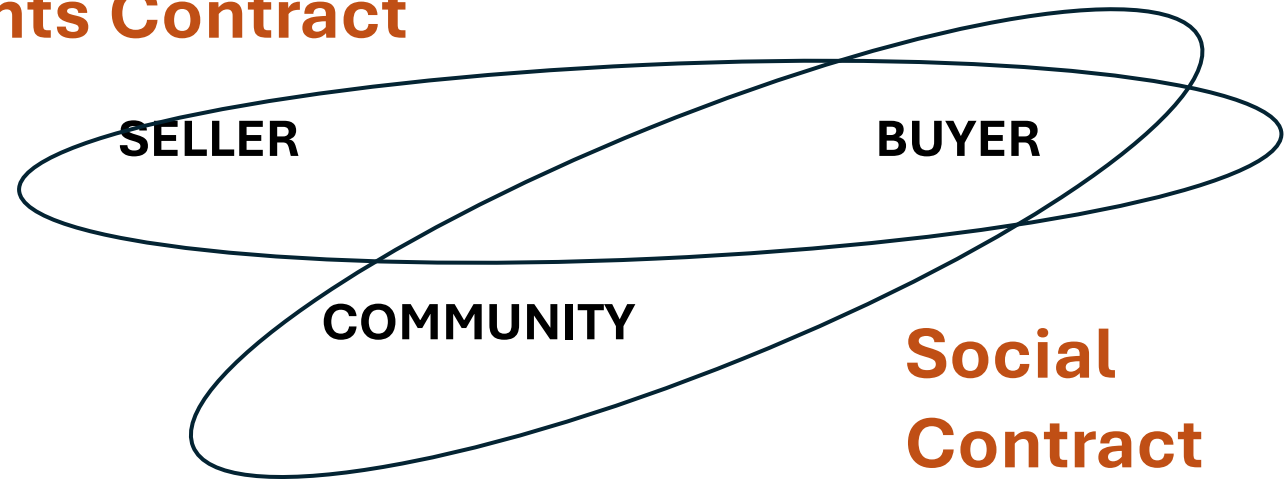
- PXC COMMONS
- CHERRY HILL
- TAKOMA VILLAGE

ALSO...WAIT LIST/WAIT POOL: WHY DEVELOP?

PDX
COMMONS:

Contracts
Philosophy

**Legal/property
rights Contract**



2 parallel tracks

PDX COMMONS: Contracts Philosophy

Legal/Real Estate Contract

- Governed by state and federal laws
- Industry professionals
- Standardized legal agreements

Social Contract

- **Written**
- Embodied in HOA docs, approved by governing group
- Community Policies and Agreements
- Hoa dues
- Governance/Decision-Making/Consensus/Sociocracy
- Participation
- Meals
- **Unwritten**
- Vision & Values
- Community expectations & norms; how we do things here
- Mutual support
- How we run our meetings
- Community traditions

Our goal: to balance the sellers desire for a fair price for their unit with the Community's desire to remain strong into the future.

PDX COMMONS:

Sales Policies & Preparation

Establish Sales agreements and policies

PDXC – Right of First Offer (ROFO); in the deeds

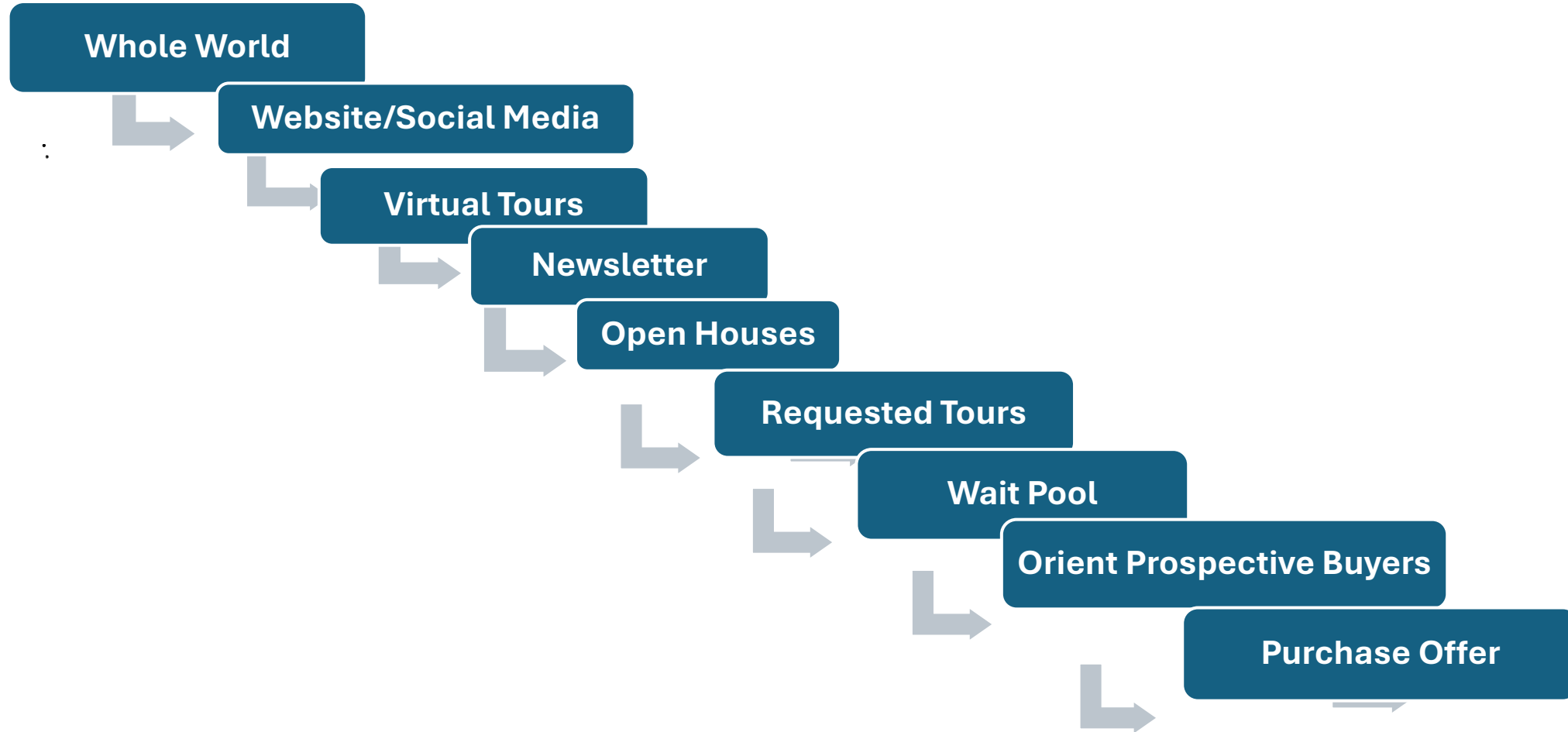
- Require any prospective buyer to go through the Orientation BEFORE they can make an offer;
- Pre-qualify the buyers
- Clarify priority of buyers: Existing members/Wait Pool/coho friendly/public in general
- Suggest Inheritance clause

Create an outreach committee

Resale team as needed, 3 people (it's a lot of work)

Implement marketing & outreach

Pathway to Sales: Ongoing Marketing & Outreach



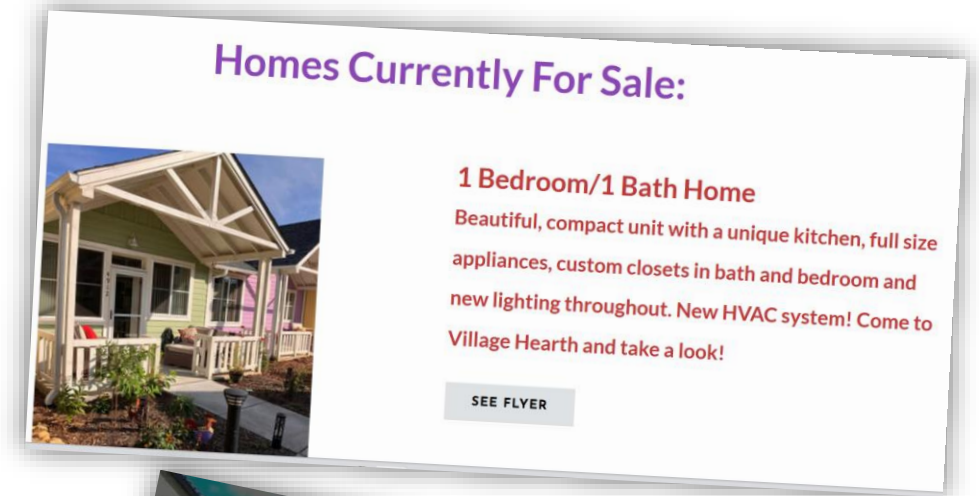
Marketing: When a Unit is for Sale

Market to “coho friendly” buyers


- Wait Pool
- Mailing list - Newsletter
- Front page banner on Web site
- Social media
- Coho US classified Ad
- Foundation for Intentional Communities ad
- Communities Magazine

More traditional channels

- MLS
- NPR
- Unitarian Universalists World Magazine
- Google ad



Homes Currently For Sale:



1 Bedroom/1 Bath Home
Beautiful, compact unit with a unique kitchen, full size appliances, custom closets in bath and bedroom and new lighting throughout. New HVAC system! Come to Village Hearth and take a look!

SEE FLYER



Aria Cohousing

Condo For Sale

2 Bed, 2 Bath - 1,200 sq. ft.

More detail in Workshop: Cultivating Connections: Part I

PDX COMMONS: Assisting the Seller

COMMUNITY SUPPORT – Become a Partner with the Seller

- Create a Resale Team
- Provide “For Sale by Owner” (FSBO) information
- Provide past sales prices for comps & coho friendly brokers

MAJOR DECISION: FSBO or Realtor?

Real Estate Broker

- Meet broker and orient to community
- Broker must understand the community process to pre-qualify buyers
- Requires cooperation for the seller to instruct the Broker

For Sale By Owner (FSBO)

- Save \$ (4-6%)
- Requires more member time – Resale Team
- Direct relationship with potential buyers
- Requires more direct role of Seller

PDX COMMONS: Community Support

SELLING UNIT

- Hold Open Houses
- Individual tours & showing of the unit
- Market to priority groups: members/wait pool/ mailing list/ Coho friendly buyers
- Orientation to any prospective buyer
- Keep community informed

- *If FSBO, seller saves real estate commission (4-6%)*
- *Seller voluntary contribution as appreciation for the Resale Team's work and the Community to add value. Mandatory 2% payment*
- *WIN/WIN: Seller gets a fair price for their unit, saves on marketing & sales costs. Community gets a valuable new member*

POST SALE

Help with the transition... Seller moving out

- Logistics
- Saying good by

Mentoring New Member – Buddy System

- Learn the ropes
- Introduction to cooking for the community
- Place new member profile in newsletter

CHERRY HILL

Community Involvement with Unit Sales

OUR PROCESS

- **Sales are managed by the Membership Circle.** In 30 years, we've never had a realtor involved. A lawyer sits on our Membership Circle so legal needs are reviewed by her. Eventual purchase is handled by lawyers for buyer and seller.
- When unit comes up for sale, the **community has a 30-day right of first refusal** during which time the unit is **simultaneously offered to current residents and wait pool members.**
- **'Special Circumstance' mechanism** can prioritize certain buyers (family member, young family, household of color)
- We've evolved from a **Waiting List** (by date) to a **Wait Pool** so we can prioritize younger couples and families

CHERRY HILL

Policy Considerations for a New Project

We established the following policies before move-in and documented them in the bylaws/community agreements. These become part of our community's **ORIENTATION** to newcomers:

- We are '**owner occupied**' project so '**whole house rentals**' are temporary, time-limited (e.g. for a sabbatical; to care for a family member; etc). One year limit with a second year by request. Many units have rent studio spaces or have housemates.
- We chose to be a **limited equity** development—unit sales price is based on appraised value (not assessed value), not by market values/windfall potential

CHERRY HILL

Cultivating a Wait Pool

GUIDELINES: HOW TO GET IN THE WAIT POOL

- Arrange a Tour
- Attend a Community Meal & ‘Get-to-Know-You Meeting’
- Attend at least one entire Full Circle meeting (*schedule is on web page*)
- Attend an Orientation Meeting
- Read the “New and Prospective Members Agreement”
- Print out and sign “Financial Info for Wait Pool” document (*on website*)
- Email a Written Request to be in the Wait Pool

ARTICLES (*on our website*)

- “Is Cohousing Right for You” article
- Article on Sociocracy

TAKOMA VILLAGE

Educating Buyers

(online documents)



FOOD FOR THOUGHT –Qs to consider

- ...what **benefits do you hope to realize** by living here
- ...**how you might contribute** to meetings, meals, social events, and the work of the community
- ... **worries or concerns you have** about living here?
- ...your **thoughts about our practice of decision-making?** Are you able **to listen respectfully**, state concerns constructively, and **collaborate to find solutions?**
- Do you have **concerns about our bylaws, policies, and guidelines**, especially about participation (WorkShare), pets, and rentals?
- **How would you expect to navigate some of the common tensions of living in community** (e.g., parenting/interactions with children, maintaining positive relationships and resolving conflicts, balancing other life demands with the responsibilities of participation)?

GUIDE FOR PROSPECTIVE RESIDENTS

– each has detailed descriptions

- Learn about cohousing
- Take a tour of Takoma Village
- Read our governing documents
- Observe our meetings*
- Attend social events*
- Participate in our workdays*

TAKOMA VILLAGE

Resales



Has an active **Resale & Rental pod** (team/committee), which assists homeowners to sell their homes using a standard For Sale By Owner (FSBO) process. Our R&R process saves sellers an average of \$24,000. In return, we ask sellers for a **donation to the community of 1-3%**. In six years, sellers have donated in excess of \$120,000. And that's with some sellers declining to donate anything.

The **program's key feature is identifying and providing buyers** who are well versed in living in our cohousing community. That's the real power of the Resale program.

Since we began this program, **new folks show up for workshare, attend meetings, serve on a team, and participate in the social life of the community**. They do these things because our Resale program is organized around a series educational and informational touch points for folks in which we stress the importance of these activities.

Inheritance – PDX COMMONS

Recommends that all members add a clause or note to their will & trusts

- Lay out your personal wishes for resale
- Cooperate with community
- Give priority: members/wait pool/coho friendly/ public at large
- Sell at below full market value if necessary

We have a document with signature acknowledgement: “Advisory Instructions to Executor/Heirs/Trustees on the Sale of my PDX Home”

Inheritance & Rentals -- OAKCREEK

Sends a Letter to Homeowners' Families/Future Heirs introducing

- the **Community Home Resale Group**, its role and success with past sales.
- the 'Oakcreek **Community Agreement on the Sale of Homes** document that details how sales are managed by the Resale Group.

The letter further outlines the **conditions under which a home may be rented**.



Inheritance & Rentals – CHERRY HILL

*If owner **names their child in their will**, the (adult) child may, if desired, go through the wait pool process at any time.*

Upon the parent's death

- *child has at least a year to decide to live here/sell. A 2nd year may be requested.*
- *To live in the home or to rent, they must follow the normal orientation process regarding occupancy when an owner is absent.*
- *If they decide to live in cohousing as a member,*
 - *If already in the wait pool, a special circumstance will be raised on their behalf which includes full circle approval.*
 - *If not in the wait pool, they will follow the wait pool process, including members' right to raise concerns about them becoming a community member.*

More Issues

- **Buyers looking for ‘assisted living’ in a cohousing setting**
- **Units becoming rentals**
- **Establishing participation expectations for members & buyers**

Communicating about support expectations

“We get applications from needy older women; and people who have so little support, they are desperate to get to a community who will support them physically, emotionally, financially. Because we’re rural it’s not easy to live here. You must be able to drive and be self-sufficient in other ways.

- Elderspirit, Elderberry [both have surveys online]

Units becoming rentals

“A recent concern has been ensuring that no one buys here with intention solely of renting it out. Or rather that we limit the number of such sales. We are besieged with calls from investors wanting to buy our individual houses.

- Lake Claire Cohousing

Strategies for Educating/Communicating:

Community-produced Education Guides & Self-Assessment Surveys (most on websites)

| | |
|---------------------|--|
| Aria Cohousing: | Caring and Caretaking |
| Bull City Commons: | Interest Questionnaire |
| Elderberry: | Health Self-Assessment Questionnaire |
| Elderspirit: | Mutual Support Brochure |
| Elderspirit: | Are We a Fit? Questionnaire |
| Emerson Commons: | Joining the Community |
| Highline Crossing : | Participation Expectations & Our Teams |
| Mountain View: | About Us & How We Operate; Pathway for Prospective Members |
| Oakcreek: | Community Care Partners Agreement |
| Putney Commons: | Steps to Join the Wait Pool |
| Quimper Village: | Neighborly Care, Not Health Care |
| Takoma Village: | Guide for Prospective Residents |
| Wolf Creek: | Participation Agreement |



QUESTIONS