Planning For The Future

A Strategic Plan For 2011-2016

“So where are we going for the next five years?” That is the question the San Juan Community Home Trust asked itself about a year ago. The last strategic plan had been completed about 7 years earlier when a previous Executive Director had been in place and only one of the current Board members was part of the process. While many of the goals in the previous strategic plan had been completed, a number of new directions had been pursued and, as we all know, the world changed (e.g., recession, an increasing affordability gap on San Juan Island).

For the past year, the Board and our Executive Director have gone through a strategic planning process. Being an organization of, and for the community, we knew we couldn’t answer the question of where to go without talking to a large number of people. Ultimately, we spoke with 54 people from across the Federal, State, County, and Town Governments, the San Juan Island business community, other local non-profits, other organizations involved in affordable housing and, of course, our Home Trust Community (residents, members, donors, Board members, and staff).

The feedback we received both pleased and surprised us. There was a genuine appreciation for the Home Trust’s successful delivery of high quality, permanently affordable housing to low-to-moderate income families, thus contributing to the long-term stability of our community. There was also gratitude for the vision, hard work and dedication of a small group of people who performed a critical role that wasn’t being adequately addressed by others. Given that success, people thought the Home Trust could do even more – becoming the community’s “voice” in broader affordable housing-related issues and leveraging our housing experience to address the broader affordable needs of San Juan Island. In order to do this, people recognized that the Home Trust would need help, both through adding staff (or staff-equivalents) and increasing financial support.

This feedback allowed the Board to identify six key issue areas that needed to be addressed to meet the future our community saw for us: clarifying the markets we would serve in the future, identifying the workload associated with our future direction, raising the funds to pay for the staff and projects associated with that direction, educating and engaging our community more in issues related to affordable housing, becoming more of a “partner” with the Town and County to address affordable housing needs, and strengthening our Board to address these issues, ultimately compiled into the 2011-2016 Strategic Plan, which can be viewed on the Home Trust website.

- Glen Bruels
Re-sales of Community Land Trust homes are showing the true value of the homes constructed by the Home Trust. This year we’ve had four re-sales--each with an enthusiastic buyer. The Home Trust has a continuing role in stewardship of its land, as well in providing homebuyer counseling, qualifying applicants to become homeowners and packaging their mortgages in the resale of our CLT homes.

With permanently affordable homes, subsidies are preserved by restricting the resale price of homes, keeping homes affordable to subsequent buyers. If the seller has owned the home for five years or more, they can earn enough equity for a down payment on a market rate home, as did Judy McManus with the recent sale of her home in the Salal neighborhood. This is a win-win-win situation: the buyer wins, the seller wins, and the community wins!

Four new homes have sold in Sun Rise this year, but, due to job loss and subsequent withdrawal of an applicant, there is still one 3-bedroom unit for sale. Thirteen units are occupied and the Sun Rise neighborhood is thriving. Sixteen children having the benefit of a home and close-knit community, and residents working together on common issues.

It’s also been rewarding this year to get feedback from stakeholders in the community acknowledging the important role played by the San Juan Community Home Trust. Since its inception, 36 households have had the benefit of owning permanently affordable home. And with land and infrastructure for 106 more homes in the future, the Home Trust’s impact will only continue to grow.

Special thanks to the Board of Directors this year, for going the distance with developing a new Strategic Plan!

From Executive Director Nancy DeVaux

The Proof of Perpetual Affordability

Even though there hasn’t been a construction project going on this year, it has been a “proving period” -- in more than one way.

The Living Machine has been proving its ability to effectively treat wastewater (see article on page 3)-- AND the Home Trust’s two neighborhoods have been proving that permanently affordable home ownership is expanding its impact here on San Juan Island.
The innovative wastewater treatment system at Sun Rise has been undergoing study this year, to prove that it is functioning as anticipated. Both water quality and flow (amount of water) are being tested on a weekly basis.

One goal is to show that the quality of water being discharged would be suitable for non-potable uses, such as irrigation and toilet flushing. The Home Trust is advocating for change in State regulations that will allow small scale systems such as ours to re-use the treated water. This will be an important step in water conservation.

Another goal is to show that the amount and quality of water being discharged into the drain-field is low enough to add more homes without increasing the size of the drain-field.

According to Dave Maciolek of Aquanova Engineering, lead engineer on the proving study, the system is required to meet fairly stringent discharge limits for nitrogen (<10 parts per million). Reducing nitrogen to this level results in very high effluent quality, equivalent to tertiary treatment.

The flow rates are now at about 1,000 gallons per day. The residents on the system are utilizing water conservation fixtures in their homes. The current flows into the system appear to be very low, much lower than projected. However the wastewater concentration is higher than projected, which is OK and is expected with low flow.

San Juan Community Home Trust received a $22,000 grant from the Russell Family Foundation this year to help pay the costs for testing the system and proving that it works to conserve water, to protect the marine ecosystem by not having an outflow pipe emptying into the Sound (like traditional systems) and move towards greater acceptance of this alternative, sustainable technology.
In Appreciation

The following individuals and organizations generously donated funds and services in 2012. Thank you for your continuing support!

Audra Adelberger
David & Phyllis Adelman
William & Karin Agosta
Donna & Eugene Alexander
Charles Anderson & Pamela Gross
Mark & Mary Jane Anderson
Archdiocese of Seattle
William Arney & Pamela Stewart/Cafe Demeter
Courtland A Bell III
David Bentley
Drs. Charles & Marcia Bieber
Michael & Mary Bills
Charles Bodenstab
Phillip & Sina Boyd
Jeff Brash
Rob Browne, Browne’s Home Center
Glen & Debra Bruels
Mark Buehrer/2020 Engineering
Sam Buck
Cynthia Burke
Simona Burla
Chinmayo
Jack Clay
Sam & Emily Connery
Archipelago Consulting
Mary Ellen Courtney
Annette Crosby
Sarah Crosby
Darby Crouss
Trudy Dallas
Kirsten & Philip Daniel
Becky Day
Cere Demuth
Betti Deutsch & Jay Lien
Joseph & Helen DeVaux
Nancy DeVaux
Darryl & Mary Ann Dobras
Eileen & Dan Drath
John & Louise Dustrude
Danielle Eisenhardt
William Egan
Steven & Monique Elfman
John & Annette Elsbree
Barbara Figelski
Daniel Finn & Therese Scott Finn
Peter Fisher

Daniel Frymire & Nickie Davis
Bob Gamble & Winnie Adams
Dodie Gann
Patty Garcia
Jim Gimlett
Patricia & David Giuliani
Granola Girls
Scotty Greene
Ed Greub & Alice Acheson
Friday Harbor Dentistry
Michael & Jean Griffin
Wayne & Cynnie Griffin
Griffin Bay Bookstore
Leonie Griswold
Susan Grout
Tom & Lynn Grow
Lucy Hadac
Julie Hanks
Francie Hansen
Rochelle Harrington
Mel & Florence Harrison
Carolyn Haugen
Beth Helstien & Marshall Sanborn
Judith & Fred Henley
Molly Hogan
Home Port Flooring & Design
Verne Howard
Shaun Hubbard & Harold Kawaguchi
Alice Hurd
Island Gardens Co.
Islanders Insurance
Carol Jackson
Elise Jensen
Thor & Sara Jensen
Vanessa Johnson
Martha & Peter Kaye
Mr. & Mrs. Richard Keefe
David & Judy Kennedy
Keith Keyser & Deb Langhans
Peter & Becky Kilpatrick
King’s Receipt Program
Rich Komen
David & Karen Kratter
Carrie Lacher
Margaret Langlie and Peter Goddu
Angie Lausch
Jim & Lisa Lawrence

Richard Lawson Construction
Ted Leiker & Dolly Salazar, San Juan Septic Service
Juan & Heidi Lopez
Walter & Ruth MacGinitie
Jerry & Dede McCormick
Louise McNerney & Jan Sobieralski
Mary Michael
Stacie Milam Grey
The Moss Foundation
The George G Mulligan Revocable Intervivos Trust
Malcolm & Janet McWhorter
Jeremy Means
Dina & Faim Melic
Jana Meredith
Rhea Miller & Sandy Bishop
Richard & Barbara Miller
Robert & Tana Miller
Patrica Morse
David Moulton
William & Sally Neukom
Jim & Katy Nollman
The Norcliffe Foundation
The Oak Hill Fund
Tom & Connie Odegard
Odle Consulting
Merritt & Janet Olsen
Suzanne & John Olson
P. P. Holdings LLC
Barbara Parnes
Charles & Doris Peckinpaugh
Thom Pence
Deb Pigman
Sharon Pigman
Anne Pope
Chris & Betsy Pope
Lloyd & Sharon Powell
Boyd & Lovel Pratt
James & Judith Prince
John & Priscilla Privat
Susana Quiroz
Ruthe Ramirez
Charles Richardson
Patricia Rishel
Roche Harbor Village Resort
Alan & Lynn Roochvarg
More In Appreciation!

Benj & Nomi Ross
The Russell Family Foundation
Joe & Kathy Ryan
Cal & Mary Karen Ryan
Roger & Claudia Salquist
San Juan Interiors
San Juan Island Community Foundation
Annette Schaffer
Ken Sebens & Emily Carrington
Charles B. See Foundation
Cady Seiler
Ruth L. Semple
Bill & Laura Jo Severson
Wendy Shepard
Jean & Ron Shreve
Courtney Smith
Michael Smith & Mary O’Connell
Joyce Sobel
Larry Soll & Nancy Maron
Beth Spadafora
Taiya Speed

Pauline & Edgar Stern Foundation
Ed Stiles
Lori Stokes
Sue-Erin Stone
Mr. & Mrs. Richard Strathmann
Lee & Tal Sturdivant
Don & Nancy Todd
Laura & Doug Tuttle
Doris Van Alen
Val & Leslie Veirs
Mariluz Villa and Tom Reynolds
Bill & Carol Waxman
Judy Welch
Brian Welch
Henry & Holly Wendt
Westcott Bay Orchards
Polly White
Nancy Wight
Wingate Enterprises
Mark and Sharon Wood
Maia Yip

Fundraising
Matching Grant Opportunity!

An anonymous donor has pledged to match up to $15,000, dollar-for-dollar, for donations made to San Juan Community Home Trust by the end of the year. SJCHT relies on membership donations and charitable contributions and does not receive government funding to support its administration.

Please send your check to:
San Juan Community Home Trust
P.O. Box 2603
Friday Harbor, WA 98250

and note “match” on the check. You may also pay by credit card, via Network for Good, from the Home Trust webpage: www.hometrust.org
or over the phone at (360) 378-5541.

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>Current Assets: Checking/Savings</td>
<td>$176,201.25</td>
<td>$255,860.23</td>
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<td>Accounts Receivable</td>
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<td>Total Current Assets</td>
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<td>Fixed Assets (Land &amp; Improvements)</td>
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<td>Amortization</td>
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<td>Total Assets</td>
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<td>Liabilities: Accounts Payable</td>
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<td>Long Term Liabilities</td>
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<td>Equity</td>
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<td>Total Liabilities &amp; Equity</td>
<td>$4,654,627.74</td>
<td>$6,132,260.48</td>
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## 2011 Abbreviated Financial Reports

*From Statement of Activities*

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<thead>
<tr>
<th>Income</th>
<th>2011</th>
<th>2010</th>
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<tr>
<td>Homebuyer Fees</td>
<td>$1,547.20</td>
<td>$710.00</td>
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<td>Memberships &amp; Contributions</td>
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<td>Grants</td>
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<td>Income From Home Sales</td>
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<td>Interest Income</td>
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<td>Rental Income</td>
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<td>Salal Operating Income</td>
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<td>Salal Reserve Income</td>
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<td><strong>Total Income</strong></td>
<td><strong>$1,811,993.30</strong></td>
<td><strong>$1,456,638.04</strong></td>
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### 2011 Income

- **Homebuyer Fees**
- **Contributions & Memberships**
- **Grants**
- **Income from Home Sales**
- **Interest Income**

### 2010 Income

- **Homebuyer Fees**
- **Contributions & Memberships**
- **Grants**
- **Income from Home Sales**
- **Interest Income**
### Full financial audits by Sanders and Sanders CPAs, PSC, are available on file in the Home Trust Office
San Juan Community Home Trust

Building A Healthy Community One Permanently Affordable Home At A Time

2011 Board of Directors
Barbara Starr — President
Mary Ellen Courtney — Secretary
Glen Bruels
Sam Buck
Peter Kilpatrick
Jim Lawrence
Dina Melic
Lee Sturdivant

Board Members Emeritus
Dr. Larry Soll
Roger Salquist

Executive Director
Nancy DeVaux

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Friday Harbor, WA 98250