



Cohousing Resources LLC

Membership & Outreach Manual

This manual is designed to help your community develop a plan for increasing your membership and outreach. Perhaps your community has been meeting for years and has decided to move forward with increasing membership; or perhaps you've just begun and you're working to develop a core group of people to make this dream a reality. In either case, this manual will help you to develop a strategy to increase your membership and outreach in a professional and comprehensive manner.

The first section of this manual is all about you and the membership of your community. We'll go through several exercises and information gathering steps to establish who you are as a community. Each cohousing neighborhood has a unique character and charm. This section will help you to more clearly define this character so that you can communicate it to others who are interested in your community.

The second section is all about the direction of your outreach. Where will new members come from? Who is most likely to be interested in your community? What kind of person is interested in cohousing? What are the unique needs of a cohousing family?

Finally, the third section will help you make a plan to increase your outreach. This section will give you practical tools for developing relationships within your community and get the word out to those who are most likely to be interested in your cohousing neighborhood, making your hopes for new community a reality.

We hope this manual provides the tools you've been looking for. As always, we welcome your suggestions for improvements and your own ideas for what has worked for you.

In community,

Kelly ScottHanson

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Your Community

The first section of this manual is all about you. We'll go through several exercises and information gathering steps to establish who you are as a community. Each cohousing neighborhood has a unique character and charm. This section will help you to more clearly define this character so that you can communicate it to others who are interested in your community.

Who Are You?

The first step in creating a Membership and Outreach plan is to come to understand the gifts and resources of your present community. What do the individuals in your group bring to the whole? What does your community value and appreciate?

In this section you will find group exercises and worksheets to help you develop a profile of the people in your community, and get to know each other better in the process.

Create a Community Biography and Photo Brochure

Time: 45 minutes

Supplies:

- Camera with film for each group
- Copies of Biography Form for each individual
- Pens/Pencils

Directions:

1. Divide into groups of 5-6 people. Try to mix well; making sure newer members are intermixed with longer-term members.
2. Assign one person to be the recorder.
3. Going around the circle, have each person answer the questions on the biography form, while the recorder writes down the answers. Encourage people to elaborate on their answers, while the recorder writes simple answers.

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4. Assign one person in each group to be the photographer. Have this person take an individual picture of each person to be used later in a published piece.
5. Later, have one person in the community compile all the biographies and pictures into a brochure that can be handed out to current and prospective members.

Biography Form:

1. What is your name?
2. What's your vocation/occupation?
3. Describe your immediate family or the folks you live with.
4. How did you come to find out about cohousing?
5. What's your biggest hope for cohousing?
6. What are some of your hobbies?
7. How long have you been involved with this community?
8. Is there any one thing everyone should know about you?

What Skills do you Bring?

Time: 20-40 minutes

Supplies:

Circle of Skills enlarged on a 3 foot by 3 foot piece of paper

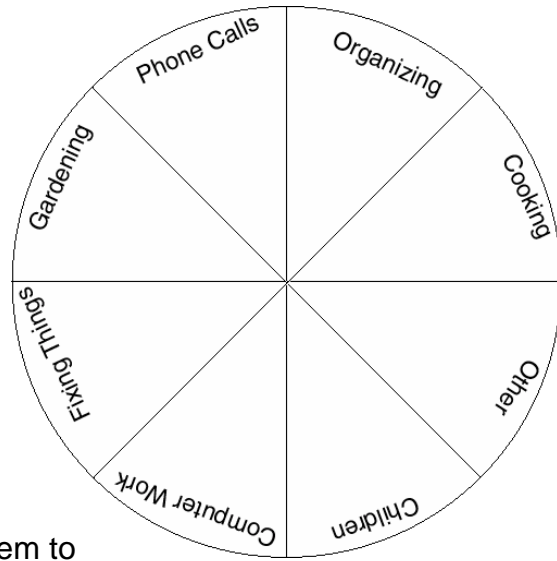
4 large green dots (large enough to write a name on them) per participant

3 large yellow dots per participant

Pens

Directions:

1. Hand each participant 4 large green dots. Have them write their name on each one.
2. Going around the room, invite each person to put a green dot on the Circle of Skills in an area they feel they have particular skills. For example, Joan has a lot of experience gardening, so she puts her dot in the gardening section. Have each person put up only one dot at a time and invite them to say a bit about why they have put their dot in that section. Continue around the room until all the dots have been placed on the circle.
3. Hand each participant 3 large yellow dots. Have them write their name on each one.
4. Go around the room as previously, but this time have the participants put their dots next to skills they would like to develop. Invite them to say a bit about why they want to develop this skill.



Create a Mission and Values Statement

A values and mission statement can be a useful tool in many ways. Its primary purpose is to communicate the goals and underlying principals of those goals to existing members, prospective members and the larger community. The process of creating a Mission and Values Statement can be an excellent community building activity. [Examples of existing vision statements](#) are available.

To create such a statement your community will need to answer two basic questions, which aren't as simple as they may first appear:

1. What does your community want to accomplish? Or, what are your goals?
2. What basic values do you hold in common?

There are many ways to try to create a statement that addresses these two questions. You are encouraged to incorporate the creativity and wisdom of your own group in the creation of such a statement. The following is a method you are welcome to use or modify:

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Round Robin Discussion

Time: 1 hr 15 minutes, 20 minutes at a later time

Materials:

Butcher paper, flip chart or large white board

Pens

Scratch paper for each participant

Special Notes:

This process is divided into two phases. During the first phase the community will develop the language and the general scope of the vision statement. After the initial meeting, a member will take this feedback and develop a preliminary vision statement. At the second meeting the community will re-gather to consent to the statement or make modifications and additions.

Directions:

1. Assign one person to be the recorder and one person to be the facilitator.
2. Have participants sit in a circle so everyone can see everyone else.
3. The facilitator should start the meeting with an icebreaker. If there are new people in the room the icebreaker should include introductions. For example, you could have each one in the circle give their name and the job they would most love to have if there were no restrictions on such things.
4. Have each participant close their eyes for a brief moment and imagine what their community will be like in 5 years. It's Saturday morning at 10 o'clock. Fall has just settled in, but the morning air is cool and clear. Outside you can hear the laughter of children. What are you doing? Invite brief two or three sentence responses to this question.
5. Invite participants to toss out a descriptive word or phrase to describe what they hope for both through the development process and when they are all living in cohousing. The recorder should write these phrases down.
6. Have each participant write down their own answer to the following question. "What 5 things are most important to me in the creation of this neighborhood?"
7. When people have finished writing their responses, invited the group to split into smaller subgroups to share their written responses. See how

- many of the things listed are similar and how many are different. Organize the statements by similarity.
8. Have each small group report back to the larger group. The recorder should write down the statements from each small group, continuing to categorize them by similarity and making some indication of common or popular themes.
 9. Is there anything missing, or that we disagree about? The facilitator should lead the group in a brief discussion to pinpoint either missing elements or points of contention on the list of things the group has developed.
 10. Thank all the participants for their hard work and let them know that a member of the community will spend some time compiling the results of this discussion and bring to the community a proposal for a mission statement. Announce the time of the next meeting.

After the first process is complete, have a member compile all the feedback into a sample vision statement. Gather the community together at a later time to come to consensus about the vision statement.

Making Policies

There are a lot of decisions that need to be made by your community. Some of those decisions are easier than others. Fortunately, there have been enough cohousing groups that have blazed a trail on most policy decisions that the process has become easier.

You may find that a weekend workshop is the best way to establish many of the necessary policies. The following section details some of the wisdom that has come out of Cohousing Communities that have been there.

Acceptance or Selection of New Members

Many groups talk about establishing a selection process for considering new members. On the face of it, it seems like a good idea to carefully consider who you want your new neighbors to be. What kind of people are interested in cohousing and who is likely to become your new neighbor?

Most groups eventually settle on a self-selection process. The reason, perhaps, is due primarily to a growing trust in the type of people who are attracted to cohousing. Maybe more importantly, it is based on a realization of what type of person is not interested.

First, those attracted to cohousing are generally proactive, make it happen, get it done kinds of people. They don't tend to think of the world as happening to them. Instead they think of themselves as making the world happen. Also, they

are seeking more community in their lives, finding the level of privacy they now have to be just too much.

Generally they are relatively well educated, if not formally, then informally or self-educated. Well traveled, interesting, and socially concerned people, they are religiously and politically diverse.

Conversely, those not interested in cohousing are generally satisfied with the current level of privacy in their lives. They are not seeking participation in community, at least not any more than they are already experiencing.

Participation in community requires exposing oneself somewhat to others. It requires a level of honesty and participation. It also requires a degree of engagement on a daily basis.

Based on experience it is unnecessary to set up a selection process because the self-selection process works fine. Those who have joined and find it doesn't work simply leave. The process gives them time to figure out what works, and whether or not their expectations can be met. It also allows existing members to get to know the potential new member before they actually commit to joining, eliminating the biggest fear of all: uncertainty.

Unit Selection

Unit selection can be a delicate issue. Who gets first choice, and what is fair? Most groups (maybe all groups) decide early on to select units based on the sequence in which a household has joined the group as an equity member. This sounds straightforward and relatively easy, but several issues should be anticipated.

The most obvious is special needs. How do you deal with a member who needs a wheelchair accessible unit when only a portion of the project has been designed that way? What about a family who needs a three bedroom, can't afford a four bedroom, and is worried about the small number of three bedroom units available? And what about the person who can only afford a very small unit when you are planning to build only one of them?

Well, it all works out. First, don't select specific units until after the project design is complete. Make sure that there are sufficient units of the types and sizes required to meet the needs of all the members you have before the initial unit selection, plus those you anticipate will be joining. For those with really special needs consider planning for more than one unit that will meet their needs.

You have probably agreed to a first come, first served selection process. If more than one household joins on the same date simply have those households draw straws.

Generally, the original group will be making their unit selections all at the same time. Simply schedule a day to have a unit selection meeting. You might want to do a few practice rounds of choosing a unit. Have each member indicate where they think they might want to be. Allow more than one household to select the same unit and ask each household to specify first and second choices. Final choices may not be strictly in order since some will choose to defer to those with special needs.

After some discussion all groups seem to be able to find a way to make everyone happy. Some people with early choices find that it really doesn't matter where they are going to live. Some are there for the community first and the unit location is of little consequence for them. Those with specific needs can usually have their needs met quite easily.

New members who join after the first unit selection process has been completed will know what is taken. They can select from what is still available. If you have done your unit mix well they will find a unit that is right for them. With 8 units left at WindSong the mix was still quite good, including; two- 1 bedroom + den units, three- 3 bedroom units, and four- 4 bedroom units.

The “Scale Down” Phenomenon

When they first get involved, people often choose a unit bigger than they really need or can afford. Keep this in mind as you establish your unit mix, and later during the unit selection process. Typically, a few households who fully intended to purchase a three-bedroom unit will scale down to a two-bedroom unit just before the start of construction. A significant shuffling of units can result. I suspect that several factors contribute to this phenomenon, including:

- Increasing trust in the use and availability of the common house to meet family needs, such as guest rooms, shared office spaces, and children's play rooms.
- Increasing appreciation for and understanding of the life of children in a community or village resulting in a lower priority on the private bedroom space for each child.
- As time passes and the group ages, children will leave
- And last but not least, financial reality strikes.

Develop a Project Profile

Now that you know who you are in a more social sense, it's time to start describing your community in a more physical sense. This is the time to gather information that will help you describe your community to other people.

Here are a few suggested Project Profile elements. You do not need to have all items initially. As items become available add them to your package. You may want to view samples of similar packages from other communities.

- A brief description of Cohousing
- Your vision statement
- Geographic area description and attractions
- Your membership process and fees
- Your project history and timeline
- Pictures of your community
- Biographies of people in your community
- Site schematic drawing
- Common house schematic drawing
- Individual unit schematic drawings
- Proposed unit prices
- Articles that have been published about your community
- Contact information

It is helpful to assemble this information into a packet that you can easily give to potential members and to the press. This information will serve as a guide to help new people understand your project. It is very important that this information appear well organized and professional. If there is someone in your community that has experience doing desktop publishing, encourage them to take on this project. If you cannot find someone in your community you may want to consider hiring a professional to put this information together.

Gathering this information can be a large task. The following worksheet will help you divide up the work and give you a few ideas on where to begin your search for some of this information.

Your Community

Project	Method	Who	When
A brief description of Cohousing	Review the Cohousing Journal, The Cohousing Handbook, Cohousing and the Cohousing Network Web site.		
Your vision statement.	If you do not already have a vision statement, use the exercise in this manual to create one.		
Geographic description and area attractions	Visit local real estate offices and review their information regarding your local area.		
Your membership process and fees	If you have not already done so, you should write down your current membership process. If you have not yet defined the process gather your community to come to consensus around a process		
Your project history and timeline	A founding member should sit down and draw a simple timeline for the project, starting with the first official meeting The final time point should be your anticipated move-in date.		

Pictures of your community Find a member in your community that enjoys taking pictures. Take a few spontaneous photos of your group to include in this packet and other materials.

Biographies of people in your community

If you do not already have biographies use the exercise in this manual to create individual biographies.

Site schematic drawing

This should be available after your community has done initial site design. Your architect will provide this.

Common house schematic drawing

This should be available from your architect after initial drawings have been completed.

Individual unit schematic drawings

This should be available from your architect after initial drawings have been completed.

Proposed unit prices

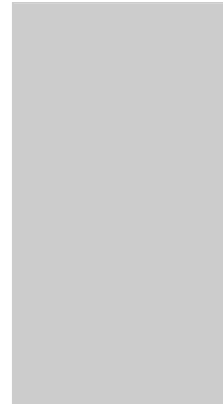
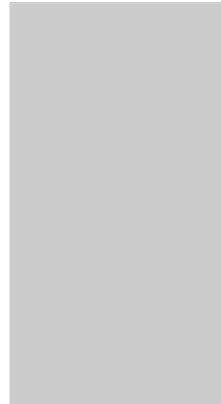
Preliminary prices should be set during the feasibility stage of your project. These should be available from your project manager. They will change throughout the project, only becoming firm after purchase and sale agreements are signed.

Articles that have been published about your community

The publisher of any articles should be able to provide you with a reproducible copy of the article.

Contact information

This information should include every form of contact possible, including web pages, e-mail, fax, phone, mailing address, etc. There should be one primary person designated as the contact point. This person should be able to follow-up with interested people and refer them to other members as appropriate.



Creating a Member Notebook

As new people become involved in your community there are a few essential pieces of information they will need to know. A membership notebook is also a good way to help existing members keep track of the decisions you've already made and keep essential information organized.

Some of this information will already be in your Project Profile, but other information will not. This packet is much more policy based and may require that your community make a few decisions around how you want to do things.

The following is a suggested list of items to include in a membership notebook:

- Your vision statement
- The membership process and fees
- A listing of community involvement expectations, including meeting times
- A listing of financial expectations
- A listing of all committees and their functions
- A timeline of activities until move-in and their impact on the community and individuals in the community.
- A listing of all professionals involved in the project and the expectations around contacting these professionals.
- A historical account of all major decisions made
- A description of your decision making style
- A description of your grievance process
- Member biographies
- Your bylaws
- Legal documents describing your organization
- Legal documents describing your relationships with other professionals
- Your home owner's manual

Some of this information will change often and should be updated regularly. It may be easiest to place this information in a three-ring notebook with dividers marking each individual section.

The worksheet on the next page will help you divide up the work and give you a few ideas on where to begin your search for some of this information.

Note: There's a lot of information that you can include in a membership notebook. It's tempting to put off creating one because it seems like a daunting task. Here are a few strategies for making it a bit easier:

- *Start with what you have. It doesn't have to be perfect.*
- *Don't forget about it or let the information rot. Assign someone to keep track of what goes in and when updates need to happen.*
- *Set aside a weekend workshop to make decisions around the things that need to go into this notebook.*
- *Read the next sections of this manual regarding creating policies.*

Your Community

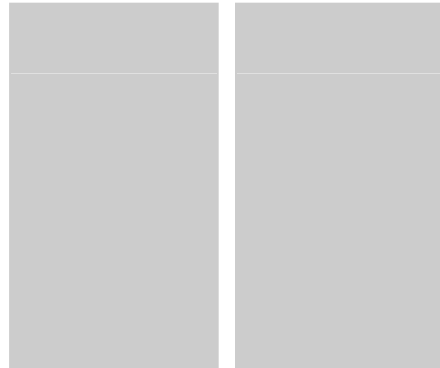
Project	Method	Who	When
Your vision statement.	If you do not already have a vision statement, use the exercise in this manual to create one.		
Your membership process and fees.	If you have not already done so, you should write down your current membership process. If you have not yet defined the process gather your community to come to consensus around a process.		
A listing of community involvement expectations.	If your community has placed expectations, including meeting times regarding meeting time, meal involvement, etc. this is the place to spell that out clearly.		
A listing of financial expectations.	All membership fees, any cash call processes, investment opportunities, meal fees, buy-out processes, etc. should be listed. A copy of the current budget should also be included.		
A listing of all committees and their functions.	List all your current committees, their functions and the primary contact for each group.		

A timeline of activities until move-in and their impact on the community.

You may want to work with your project manager on this list. Map out each activity and its impact both on the group as a whole and on each individual member.

A listing of all professionals involved in the project and the expectations around contacting these professionals.

This document should be a simple four-column list. In one column list the professional. In the other columns list their primary duties, then the member in charge of maintaining contact. In the final column indicate whom should contact this professional.

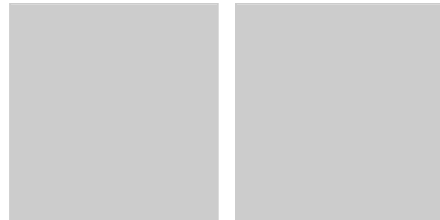


A historical account of all major decisions made.

This information should be culled from past meeting minutes. Your minute writer should be responsible for updating this list.

A description of your decision making style.

Describe your decision making process and the expectations for adding items to an agenda, and any thing else about your processes.

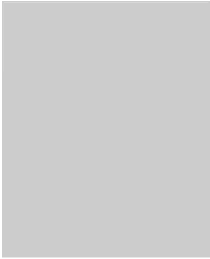


A description of your grievance process.

Describe what members should do in the event that a disagreement occurs. This process should clearly mark an escalation process and a mediation agreement.

Legal documents describing your relationships with any professionals.

If you have established contracts with other professionals that information should be included.



Your home owner's manual

If you have developed a home owner's manual that should be included.

New Members

This second section is all about the direction of your outreach. Who is most likely to be interested in your community? What kind of person is interested in cohousing? What are the unique needs of a cohousing family?

Who are You Trying to Reach?

Now that you've established who you are as a group, it's time to look at who you are trying to reach. This section covers a basic overview of the typical cohouser. It's a good idea to get familiar with your market. Visit a few communities and get the feel for what drew members to cohousing.

Who are cohousing people?

People who are interested in cohousing come from various social and economic classes, but a survey of residents at completed projects in North America indicates some interesting patterns:

- Most cohousing residents have higher than average level of education and many are professionals.
- Most selected cohousing to improve their quality of life.
- Many have chosen to work at lower paying, or more fulfilling positions, or are working only part time.
- Many have chosen to work at home.
- Many have a higher than expected level of financial resources, generally from having owned a home before.
- An unusual number of cohousing residents are debt free.
- They are proactive people, often involved in a number of other organizations and community activities.
- They range in age from early thirties into retirement age.
- They include all family types- singles and couples, with kids and without.

What attracts people to cohousing?

In developing your marketing and membership strategies you should keep in mind those things that attracted you to cohousing. Consider also the following:

- Safety and security
- Raising children
- An end to alienation
- Contribution to a community
- Opportunities for social interaction
- Flexibility and choice in such things as meals, socializing, etc.
- Environment
- Lower living costs
- Time savings
- Control
- Spontaneity of social interaction
- Intergenerational living

Integrating New Members

As you move forward you will need to consider how potential members will be encouraged to participate during their evaluation and education stage. How will you keep potential new members from feeling like outsiders? (this is about building a community with a place for all voices/everyone, after all). There are a few items to keep in mind as you integrate new members:

- Uses Professionals Appropriately. Once you have engaged the services of professionals you will appear more credible to many people. Take advantage of this by inviting potential members to join in the consultations with those professionals.
- Members invite guests to function. Set up special events for current members and their 'prospective member' guests. Your membership will do the best job of sharing the excitement and enthusiasm about your project.
- Assign members as "buddies" to stay in touch with visitors.
- Call the interested person again, just before the next meeting.
- Offer to pick them up and bring them to the meeting.
- Invite them over to dinner in your own home.

It's also important to consider how you will integrate new members. Some proven methods of attracting new members include:

- Consider “levels” of membership. Allow your membership program to have more than one level of commitment and participation. This allows people to make a small first steps, such as becoming an “associate member.”
- Focus on “OUR COMMUNITY”. Be inclusive. Talk about “our community” to include those that are associates, or who are just considering joining your group.
- Focus on your unique site. Once you have a site, focus your membership efforts around site and neighborhood specific activities. Have a camp out on site. Have your meetings nearby.
- Make sure you look competent. For many, it will be hard to believe that you are really going to make this dream happen. Look competent, act competent, and be competent.

Educating New Members

As potential members consider joining the group they will want to know what to expect. What has been decided? How is it going to work? Who is responsible for what? Presenting this information in a matter of fact and non threatening way is the key to bringing new members on board. Keeping good records, maintaining a decision log and having them available to refer to is crucial to making a potential member feel comfortable.

After a new member joins the group a major task will be educating them regarding all that has gone before. The more they get involved, the more interested they will become in exactly what is planned, what is expected, and why. Proactive types that they are, they will likely want to have a say themselves. Sometimes they will ask why something which has already been decided can't be changed, without being aware of the long involved process that went into making that particular decision the first time.

New members will need to learn the basics of the development process. They should each read *Cohousing: A Contemporary Approach to Housing Ourselves* and *The Cohousing Handbook* for instance. The topics for review with each new member should include:

- Cohousing overview and group goals and objectives
- Finance- group history, current budget, current cash flow plan, individual financial responsibility and expectations

- Legal- organizing agreements, ownership structure, rights and responsibilities
- Development Process- group history, decisions which have been made, expectations about development strategy
- Design Process- group history, status of design process, etc.
- Group Process- group history, decision making process, committee structure, issues still to be decided or discussed, expectations about participation
- Marketing and Membership Process- group history, current status of the Marketing Plan
- Working with Professionals- group history, introduction to individual professionals, expectations about contact and access
- Construction- current status, expectations about the construction process, expectations about sweat equity construction

Bringing new members up to speed is a major part of building community together, helping them understand what has been decided and why. A key seems to be really including them in what is happening as they are considering joining. Ask for help in dealing with the work that still needs to be done.

Selling Cohousing

Selling cohousing is different from selling a product. Cohousing is a way of life, it is a set of relationships, it is the design of the built environment, and most of all, it is the experience of community. In some ways, cohousing is also a product, and many of the ideas used in selling a product or service have some application that make them useful in presenting cohousing to a person for the first time.

Try what is called “Needs Satisfaction Selling.” It is generally accepted that in the sale of a product or service a person buys something to satisfy a need. It may be a basic need, such as shelter. It may also be a psychological need, such as the need to feel good about yourself, or to improve the quality of your life.

Following this logic, let's assume that people who come to an open house at your site have a need they are trying to satisfy. Your job is to find out what that need is. They may or may not be able to identify that need when you ask, so you may need to pry a little. Be patient, and most of all, listen.

You might think you can anticipate a person's needs, but it is important that you ask. Make no assumptions. Ask! Ask the person about their expectations, ask about their assumptions, ask about their feelings. Ask about their everyday life, and then listen.

Some questions you could ask to help identify a person's perceived needs include:

- Why are you interested in cohousing?
- Do you like your current living arrangements?
- Do you feel that privacy is important to you?
- What do you think about sharing child care?
- Have you considered the benefits of sharing meals once in a while?
- Have you thought about the benefits of having a supportive community?

Remember, you want to find out what they think they need, from their point of view. Don't put words in their mouth. This means you have to really listen. Show respect. Listen actively. Repeat what you have heard and ask for clarification if necessary.

One note: If a person describes a need your project won't satisfy, don't dwell on it, and don't try to fix it for them. For instance, someone may have their heart set on a fireplace in their private unit when your group may have already chosen to have a fireplace only in the common house. Move on with the conversation. Cohousing doesn't satisfy every need, and cohousing isn't for everybody.

The rules for members when reaching out to potential new members:

- LISTEN, LISTEN, and LISTEN some more!
- DO NOT ARGUE!
- DO NOT CHALLENGE!
- And please, DO NOT LECTURE! Some of us tend to just keep talking, going on and on about the history of cohousing, why we think cohousing is great, and so on. Share your personal stories, but DO NOT LECTURE!
- Do not put words in their mouth
- Show respect.

Understanding the Buying Cycle

The 'buying cycle' is different for cohousing. Most people require several months, or even years before they are ready to commit to buying membership in a cohousing community, and their decision is made incrementally. Therefore opportunities for closing occur at many points in the process.

Generally they:

- Learn about the cohousing concept (that's what the marketing efforts are addressed to at first)

- Create a new vision for themselves living in community (address in including potential members in group)
- Become comfortable with the other members of the group. (addressed in completion/integrating new members)
- Like the location of the site.
- Like the housing forms that have been designed.
- Determine that they are able to afford a unit.
- Once convinced about the merits of cohousing, people will go to great lengths to find a way to become a part of your project.

The Marketing Plan

One of the most essential strategies toward achieving your membership and outreach goals is the development of a plan. This will serve as a road map to guide you and your community to a comprehensive marketing approach. This plan should include a description of the people responsible, what needs to be done, how it will be done and a general timeline. The plan should be specific enough to include membership goals and dates for events.

The following sections will help you develop a strategy for creating a comprehensive plan. When you are ready, use the [Marketing Plan Worksheet](#) to record your plan.

Marketing Plan Implementors

There are a few specific roles that members of your community will need to fill to implement your marketing plan. Take some time to get to know each other, and start thinking about who will be best to fill each role. If no one in your group can take on a particular role, you may be able to hire someone outside the group to do this work. However, it is best to keep as much of your marketing effort in house as this will provide a much better reflection of who you are as a community.

Here are a few roles to consider:

The Closer, ready to sign them up.

Generally, the closer is the member of your group who is a natural sales person. They seem to know instinctively when a person is ready to make the next step. When it is finally time to close the deal, sign them up and deposit their check.

Don't neglect the closing function within sales. This is the process of moving from thinking about it to doing something about it. Identifying potential new

members is only a part of the process. Someone needs to follow through and be the “closer,” helping new members actually sign on the dotted line. There will be many opportunities to close throughout the membership process and on an ongoing basis you will address potential members’ concerns.

Desktop Publisher

As a forming community you'll need to communicate a lot of information to prospective members. A desktop publisher should be someone who is capable of presenting this information in a clear and professional manner that reflects the true spirit of your community. This person should take responsibility for maintaining a consistent style in all printed and web materials. You may need to hire outside help with this function if you do not currently have a member in your community with desktop publishing experience and interests.

Advertiser

In addition to producing information you will also need someone to disseminate information. Your advertiser should manage the following:

- Ad placement in local publications
- Poster locations and updates
- Web site updates

The Techie

Someone with a more computer-oriented background is very important in at least two arenas:

1. As your community begins to take shape, you'll need to keep track of a lot of information. A database is an essential piece in managing this information. Someone with a technical background can help set up a contact management system.
2. More and more communities are finding that their web pages are an excellent source of information for interested people, and for keeping current members up to date. Your techie should be able to help set up a web site and keep it current.

Press Contact

At certain strategic times it will be appropriate to make contact with the press to cover specific events or your community in general. It's helpful to have someone familiar with the press arranging this coverage.

Follow-Up Coordinator

This is the person that makes contact with people who have expressed an interest in your community. While the entire community is responsible for this, it is helpful to have a person for whom follow-up is a designated role. Follow-up includes answering any questions, and providing information materials.

Big Picture/Manager

It's also important to have someone keeping track of the bigger picture. This person should be aware of budget, timeline and personnel constraints. The big picture person should help keep communication flowing and help remove any roadblocks.

Choose at least one person to fulfill each role. Revisit these roles regularly to see if any changes need to be made.

Event Timeline

Get a calendar that covers the timespan between now and your scheduled move-in date. On this calendar, describe the general events that will occur in this time frame. Events should be in the following categories:

- Holiday/Commemorative Days
- Construction Events
- Presentations
- Open Houses
- Regional Events
- Other Events

On the same calendar highlight the following time periods in different colors.

Site Search in **Blue**

Feasibility in **Yellow**

Design in **Pink**

Unit Selection in **Orange**

Construction Documents in **Purple**

Construction in **Green**

Make plans for the different kinds of activities you will do in relationship to these events. Add them to the event section in the [Marketing Plan Worksheet](#).

Special Events

Special events are a wonderful way to build community with current members, and to encourage new ones. When doing an event invite politicians, the media, prospective new members, family, friends and neighbors. The following lists a few different types of events to consider:

- Open houses, if you have a house.
- Pot Lucks
- Open Sites, if you have no house to have open.
- Site tours
- Bon Fires
- Camp outs on site
- Slide Shows
- Have a big celebration and invite the public to join you. Make it special and invite the media to cover it.

Use the [Special Event Worksheet](#) to help in organizing your events.

Printed Materials

Develop a Package

Develop a complete package of printed materials for mail out, hand out or posting. This can range from a simple one-page brochure to a detailed package of information about who you are and what you plan to build.

See if any of your community members are capable of creating these materials. If not consider hiring someone to create these materials.

The lists different kinds of materials to include:

- Flyers
- Brochures
- Posters
- Press kit

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- Articles to publish
- Newsletter
- News Items for public service announcements
- Invitations to Special Events
- Letterhead (for press kit elements and general correspondence)
- New Members Information Packet
- Posters

Develop a regular routine for distributing posters, flyers and brochures. Update and replace them as necessary.

Direct Mailings

Periodically do a mailing to everyone on your database to keep them apprised of your progress, to encourage them to reconsider another visit, or to issue an invitation to an event.

- Newsletter
- Minutes of meetings
- Invitations
- Announcements

Site signs

Create an attractive sign for your site. Make it large enough to read easily from a distance and at eye level from in a car.

Make sure the entrance to site is groomed. Remove debris, plant flowers. Attach a brochure holder to the sign and keep it filled with flyers about your project. Make sure you keep it stocked. Keep track of the quantity of flyers taken each week/month.

Paid Advertising

In general, this is of limited use to cohousing communities because of the nature of the buying cycle and the expense of creating and running the ads. If you have the resources available and want to add this to your marketing mix keep this in mind.

After carefully reviewing the audience of your local media, select specific media for advertising. What kind of people are interested in cohousing and what media

do they read or watch or listen to. Generally, small long-term ads are more effective than large one-time ads. The following list includes a few sources to consider for paid advertising.

- Alternative Newspapers
- Special Interest magazines
- Newsletters
- Journals
- Broadcast
- Alternative radio stations
- Cable stations

The Press and the Media

The Press Kit

A press kit is your basic publicity tool. In spite of its name, it is used for all media. The media expect communication to come in a form specific to their needs to create a story angle and write or report about it. A press kit should:

1. Interest the editor in assigning the story to a reporter.
2. Provide all pertinent information to reporter as background for the story.
3. Serve as the basis for future article on the cohousing group.

Elements of a press kits are:

- Press releases
- Fact sheet (National and local)
- News clippings
- Sample Questions
- Black and white photos

Writing Press Releases

You will write press releases again and again whenever you have something new to report in your on-going publicity campaign. There is a particular style expected for press releases. The most important information goes in the first paragraph.

Who?

What?

Why?

Where?

When?
How?

Less important information follows. The reason for this is because of space restraints most editors shorten a press release to fit the space available. They will cut from the bottom. You want your most important information at the top which might be all that remains of your press release.

Press releases are written with understatement. You write the facts, other people express the opinions - in quotes.

DO:

- Use letterhead.
- State the basic facts (who, what, where, when, why/how).
- Put all the basic facts in the first paragraph.
- Write in the third person (He/she/it/they).
- Use quotes to express opinions (other's opinions or your own).
- Include release date and contact person's number in bold.
- Proofread for accuracy, spelling, punctuation, grammar.
- Be selective about when you send out releases.
- Make sure they are newsworthy.

DON'T:

- Use adjectives or superlatives (such as fantastic, wonderful, or terrific) as they are a dead giveaway of an amateur press release.
- Express opinion unless in quotes.
- Deluge the media with publicity. No one will believe you when you do have a big story.

Another good opportunity to get the word out is calendar listings. These are usually handled by a calendar editor. Typically information must be sent no less than one week before print date. Get their name then call them to tell them your sending the information send the information then call back to ensure they received it.

Use the [Press Release Worksheet](#) to get a kick start on writing your press release. You can also view a [sample release](#).

Public Service Announcements

Cable TV stations, radio stations and other media sometimes offer free listings for events which are open to the public. Ask for the public service director, have them tell you what length they prefer usually 30 sec. Read your PSA and time it prior to submissions. Identify resources for PSA's.

Plan ahead. Deadlines for these submissions are often weeks in advance. double space so it is easy to read on the air.

Articles

Some newspapers and magazines will be interested in doing a story about your group, your project or cohousing in general. This will usually be timed to coincide with a particular news event i.e. ground blessing, first family moves in, or city approval. This is the most cost effective way of getting the word out about your project.

A Note About The Media

Dealing with the media can be tricky. You want them to write about you, but you can't control what they write. Be patient with them. Don't expect very much. Provide them with written information (see Press Kit) when possible. Give them articles that have been written about other cohousing projects as long as it's not from a competing newspaper, especially articles that present cohousing in a positive light.

Be prepared ahead of time for bad publicity either from the media, neighbors or environmental groups. Create a damage control plan BEFORE you need one. If you are prepared in advance you can minimize any potential negative publicity. A damage control plan includes:

- Have press kits and materials available at all times.
- Identify and train specific people to talk to the media.
- Schedule rehearsals for answering hypothetical questions on negative, unplanned scenarios that could develop.
- Make yourself accessible.
- Show you care about the problem.
- Have positive articles to give to editors and reporters.

- Take positive action.
- Keep answers and interview short.

In the end you may have to accept that there is some truth to an old saying, “All publicity is good publicity.”

Quotes

This piece of the press kit is a one page sample of quotes from other sources about cohousing, either your specific community or from the national media about cohousing in general.

You can use quotes from the media, from authors, civic leaders or government officials. ([see example](#))

Suggested Questions

Suggested questions in the press kit makes you an easy subject to write a story about. You are providing the reporter with a place to start. Keep the questions short and all on one sheet of letterhead. ([see example](#))

Fact Sheet

A fact sheet gives a quick outline of important information about your cohousing project to the media. You are providing background information and research for the reporter. These are sometimes called a "back grounder".

Write in a factual not expository style. No opinions, only facts. Use letterhead. ([see example](#))

Presentations

Offer to speak to interested groups. Arrange to give presentations. Contact civic organizations, conservation groups, churches, and neighborhood gatherings. A presentation can include the following:

- Speeches
- Slide show
- Video
- Book Signings

Word of Mouth

Your members are the best outreach and sales team. One member, or a hired staff person may be responsible for keeping everything on track, but it is the members of your group who have already made the decision that cohousing is right for them, who are the most effective sales and outreach people. Members can invite friends to come to meetings. They should carry brochures. There is no need for them to adopt a high-pressure sales approach. A little bit of enthusiasm will be more effective.

Neighborhood Relationships

It is important to consider how you will manage your relationships with the surrounding neighborhood and the larger community. The best way is to be proactive. Establish contact early with your neighbors and continue to stay in touch.

Try to do the following:

- Attend neighborhood events
- Join local groups
- Send regular mailings to neighbors
- Updates
- Invitations
- Open houses
- Attend/participate in civic events
- Arrange meetings to discuss proposed plans or any problems that may come up.
- Offer the use of your site for groups from the larger community to meet.

Remember, they may have friends who are interested, and they may eventually get interested themselves. Many, if not all of your new members will be local to your area. You have to get the word out that you exist.

Contact Database

Early in your process you will want to start keeping track of members and potential members on some type of list. More and more people keep records on a simple computer database.

At first this is useful for contacting members to schedule meetings, etc. Later it will become an important part of the marketing and membership process. You will want to contact people who came to a meeting three months ago, to invite

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them to the next open house, and keep them informed of your progress, hoping that the time may come when they are ready to make a commitment.

Keep track of who has called and who has come to meetings. Maintain a database of names addresses and phone numbers, and develop a method for staying in touch with:

- Visitors
- Potential members
- Community/neighbors
- Press contacts (make sure to get deadlines for publication and what areas of specialty each reporter has.)
- Community officials

Database and Waiting List Maintenance

Later still you will want a list of all those who have expressed interest in becoming a part of your community. Send them your internal newsletter. Think of it as a waiting list, or think of it as “friends of the community.”

This list, if well maintained, will be invaluable to those who eventually have to leave the community. It will also make those who stay more comfortable knowing who might become their new neighbors.

Maintain your database. You will be glad you did.

Public Displays

Create a simple display to use at events. A poster on an easel, a folding board with photos and descriptions. Bring brochures and other supporting materials to complete the display. Display at:

- Conferences
- Mall exhibits
- Fairs
- Stores
- Local festivals

Managing Responses

Anticipate that your marketing efforts are going to be successful. Plan well ahead how you are going to respond to inquiries. Keep in mind that attracting new people is only half the equation. You must also answer the phone, respond

to their needs and keep track of who called. Then you must have a good system for following up and staying in touch.

Define an organized response system including how much time elapses between inquiry and response. Prompt responses keep interest in your project high and are courteous.

- Emphasize the telephone response process.
- Secure phone numbers and addresses whenever possible.
- Successful cohousing groups generally have at least one “telephone person” who feels comfortable talking on the phone almost every evening. This is a crucial part of building community, helping people feel that they are important and that they belong.
- Have a plan for responding to written requests.
- Who can approach the media and who can respond to questions from the media? Train specific people to talk to the media. Practice hypothetical answers to questions that emphasize the goals and image of your community.
- Who responds to the public?
- Who can approach and who responds to the neighborhood or to the community?

The Marketing Budget

Crucial to establishing a marketing and membership plan you must determine your financial capabilities. You will have to set a realistic budget for your marketing efforts.

Make a list in order of priority of all the marketing projects you wish to do and a rough cost estimate for each project. Decide if the project results will meet your objectives (such as increased attendance, news coverage, meet the neighbors).

Be prepared to swap 2 or 3 less expensive projects on your list for one larger, more expensive project. Remember to include sometimes overlooked costs in your estimates: postage, cost of paper, copying, invitations, refreshments, thank you notes, decorations, extra brochures and press kits, etc.

Cohousing groups who are using the Streamlined Development Model are required to establish a budget of approximately 2.5% of total project revenue. If the group successfully markets their project they will often have as much as half of this budget remaining at the completion of construction.

Management

Someone needs to track the budget, and account for the money you have agreed to spend. Someone needs to make sure that those who volunteer to do things actually get them done.

Who is going to keep the marketing effort on track and make sure your money is wisely spent?

Tracking Effectiveness and Success

Sit down together monthly and ask yourselves, “How well are we doing?” “How many phone calls are we getting?” “Are we spending our money wisely?” “Should we make adjustments to our plan?” This should be an ongoing process.

Keep records of marketing efforts

Track and graph number of phone calls, visits, brochures and flyers handed out, etc.

Record events, articles written, displays put up and mailings on graph so you can see correlation between efforts and response.

Cross reference with budget/costs to see how effective each marketing dollar is.

Worksheets & Samples

This section will provide you with a series of samples and worksheets to use in your marketing efforts. These documents are designed to be printed.

Sample "Press Release" on letterhead for Press Kit

Anyville Cohousing Rippling Brook Lane Anyville, USA

Media Contact FOR IMMEDIATE RELEASE:

Cora Cohousing Date
555-5555
e-mail - Cora @ .com

Anyville Cohousing Breaks Ground

ANYVILLE, USA - Anyville Cohousing, a 30 unit cohousing community planned for the Pike's Peak area breaks ground Saturday, October 16th at a public ceremony at 3:30 p.m. This is the first cohousing community in the greater Anyville area. The Anyville Cohousing complex will have clustered townhomes in sizes for singles to families with many children.

Cohousing, a concept new to this area but in the U.S. since 1988 features a connectedness not usually found in neighborhoods since earlier this century. The community's goal is to house a diverse group of residents who will have active participation in the planning and design of their neighborhood. "We want to bring together all ages and experiences to our neighborhood" said Bob Brown, a member of the group and future resident of a one-bedroom unit.

Anyville Cohousing has been in the planning stage for 4 years. The original members have been meeting and as member Leslie Simonsen says, "dreaming for years about creating our own neighborhood where we know each other and care about each other. We are finally at the stage where we see our dream about to come true. We're all so excited."

Unique to cohousing is sharing common facilities and activities such as maintenance, meal preparation and childcare. The common house, owned by all residents, will have space for more meetings, workshop, children's play rooms, crafts, and guest rooms.

Cohousing was first introduced to the U.S. in 1988 with the publishing of

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Cohousing A Contemporary Approach To housing Ourselves by architects Kathryn McCamant and Charles Durrett. Since that time 45 cohousing neighborhoods have been built in North America and another 30 are under construction and scheduled to be completed by the end of 1999. An additional 150 cohousing neighborhoods in 37 states are currently in various stages of the development process.

Site tours are every Sunday from 1 p.m. to 3 p.m. For more information please call Linda Garfield, 555-5555.

end

Press Release Work Sheet

What is the main point you want to make in your release?

What are the major elements of your story?

Who? _____

What? _____

When? _____

Where? _____

Why? _____

How? _____

If applicable, how much does it cost?

What activities are planned and the specific times?

Are there any special features, unique aspects to your announcement?

Other newsworthy aspects to your event, activity, announcement?

Contact person and telephone # _____

Sample Of "Quotes" On Letterhead for Press Kit

Anyville Cohousing Rippling Brook Lane Anyville, USA

What others are saying about Anyville Cohousing (or Here is what the media have said about cohousing if you use only quotes from the media):

"Cohousing is going back to the past to create the future of extended family and intended neighborhood."

First Name Last Name, State Representative

"Cohousing provides a feeling of community missing from modern life. It's a return to the extended family community that used to exist."

Anyville Gazette

"Maybe someday we'll be watching the evening news on Election Night and hear reports on how the "cohousing vote" is swinging. Because co-housing - and the tightly-knit new clans it creates - promises to be that big a phenomenon."

Author's Name

Futurist and Author of Clicking

PO Box CCC, Phone (502) 555-5555, Fax (502) 555-5555

Sample of "Suggested Questions" on Letterhead For Press Kit

Anyville Cohousing Rippling Brook Lane Anyville, USA

SUGGESTED QUESTIONS

What is cohousing?

How is cohousing different from other neighborhoods?

Who is cohousing right for?

How does cohousing fit into the community?

What is the ownership structure in cohousing?

How are decisions made in the community?

PO Box CCC, phone (502) 555-555, Fax (502) 555-5555

Sample of "Fact Sheet" on letterhead for Press Kit

You can use any number of headings. These are only a few examples. Customize the fact sheet for your unique uses. Make up a heading to emphasize the facts or points you want to make to the media. Double space between headings.

Anyville Cohousing Rippling Brook Lane Anyville, USA

Anyville Cohousing: A description of what you are.

Founded: Founded in 1996 by 5 original members who created Anyville Cohousing.

Location: Rippling Brook Lane, in the hills between the Marshall Mountains and Blue River on Pike's Peak.

Goal: A one or two sentence summary of your goals. Remember to use an understated journalistic writing style here. See "Writing Press Releases".
(Example of what to avoid: "We strive to create a place where the whole is greater than the sum of its parts.")

Size: 30 units from studios to 4 bedrooms on 4.5 wooded acres.

Suggested other headings as appropriate - Status, Special Features, (if the fact sheet is for an event) - Dates, Hours, Highlights, Special Guest.

Contact: Name and phone number of person to contact for more information or an interview.

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Media Contacts

Info and Tracking Sheet

Name of publication/station/program:

Print Radio TV

Name of contact person:

Title:

Name of column or section:

Mailing address:

Phone numbers:

General:

Special Debt.:

Fax:

E-mail:

Days, times and frequency of publication or broadcast:

Deadline info:

Types of subjects covered:

Special requirements:

Dates Information verified:

Additional Notes:(e.g. previous coverage of group, other related stories written by reporter.

Next Steps: (follow-up on _____ day at _____ time)

Ask reporter in general "When is a good time to reach you?"

Special Event Worksheet

Responsibilities assigned:

Event Planning _____
 Invitations/publicity _____
 Facility coordinator/decorations _____
 Refreshments _____
 Entertainment/Activities _____
 Event Manager _____

Mailing/phone list ready
 Event advertising/publicity placed
 Send invitations _____ weeks in advance
 Follow up - 48 hours in advance

Schedule of Activities:

Time	Activity	Description

Facilities Ready:

Adequate heating or Air conditioning Seating/standing room adequate
 Music/sound equipment ready Decorations complete

VIP Arrangements (if applicable):

Podium/Microphone ready VIP briefed on activities
 Person to greet VIP

Refreshments:

Menu prepared Serving dishes and accessories ready
 Tables/chairs ready Refreshments ready

Additional Information/ Notes:

- Holiday/Commemorative Days
- Construction Events
- Presentations
- Open Houses
- Regional Events
- Other Events

Project Phase Timeline

On the same calendar highlight the following time periods in different colors.

- Site Search Blue
- Feasibility Yellow
- Design Pink
- Unit Selection Orange
- Construction Documents Purple
- Construction Green

Marketing Strategies

Describe your approach for dealing with the following marketing opportunities or sources.

Events:

For each event you plan to do write a brief outline of the event requirements.

Event Description:

Organizer:

Date:

Place:

Goal:

Budget:

Event Description:

Organizer:

Date:

Place:

Goal:

Budget:

Event Description:

Organizer:

Date:

Place:

Goal:

Budget:

Event Description:

Organizer:

Date:

Place:

Goal:

Budget:

Event Description:

Organizer:

Date:

Place:

Goal:

Budget:

Printed Materials:

For each item listed fill in the appropriate information

Item: **Quote Sheet**

Organizer/Creator:

Date Due:

Style Requirements:

Audience:

Budget:

Item: **Fact Sheet**

Organizer/Creator:

Date Due:

Style Requirements:

Audience:

Budget:

Item: **Posters**

Organizer/Creator:

Date Due:

Style Requirements:

Audience:

Budget:

Item: **Direct Mailings**

Organizer/Creator:

Date Due:

Style Requirements:

Audience:

Budget:

Item: **Site Sign**

Organizer/Creator:

Date Due:

Style Requirements:

Audience:

Budget:

Item: **Project Profile**

Organizer/Creator:

Date Due:

Style Requirements:

Audience:

Budget:

Item: **Membership Notebook**

Organizer/Creator:

Date Due:

Style Requirements:

Audience:

Budget:

Item: **New Member Packet**

Organizer/Creator:

Date Due:

Style Requirements:

Audience:

Budget:

Paid Advertising

Publication:

Ad Size:

Frequency:

Organizer:

Creator:

Budget:

Publication:

Ad Size:

Frequency:

Organizer:

Creator:

Budget:

Publication:

Ad Size:

Frequency:

Organizer:

Creator:

Budget:

Publication:

Ad Size:

Frequency:

Organizer:

Creator:

Budget:

Publication:

Ad Size:

Frequency:

Organizer:

Creator:

Budget:

Publication:

Ad Size:

Frequency:

Organizer:

Creator:

Budget:

The Press/Media:

Primary Contact: _____

Item: **Calendar Listing**

For the following events:

Publications:

Writer:

Due Date:

Item: **Press Releases**

For the following events:

Publications:

Writer:

Due Date:

Item: **Articles**

For the following events:

Publications:

Writer:

Due Date:

Item: **Press Kits**

For the following events:

Publications:

Writer:

Due Date:

Other Events

Organizer:

Hosts:

Frequency:

Location:

Other:

Open Houses:

Organizer:

Hosts:

Frequency:

Location:

Other:

New Member Orientation

Organizer:

Hosts:

Frequency:

Location:

Other:

Presentations:

Organizer:

Hosts:

Frequency:

Location:

Other:

Vision Statements

Trillium Hollow

Portland, Oregon

1. A place where family atmosphere and friendships are important.
2. A place where quiet, peacefulness and informality prevail.
3. A place where cooperative activities are enjoyed by many and a sense of community is obvious.
4. A place where a feeling of safety and security prevails.
5. A place with good quality utilities and essential services.
6. A pedestrian friendly place.
7. A place with respect for environment.
8. A place with respect for natural wildlife habitat.
9. A place where even in small ways the arts are encouraged.
10. A place where preservation of the "village feel" both in human relationships and physical elements is important.
11. A place where natural beauty and aesthetics receive special consideration.
12. A place where open dialogue and democratic decision-making about community issues is the norm.
13. A place where agreed-upon standards or guides for construction are known and followed.
14. A place where children, school and education are priorities.
15. A place with a community house.
16. A place where residents feel a strong investment in and commitment to the total community.
17. A place where diversity of viewpoint, background and lifestyle are encouraged.
18. A place where acceptance prevails as a way of relating.
19. A place where win/win conflict resolution is practiced.
20. A place where the whole is greater than the sum of its parts.

South Sound Cohousing

Tacoma, Washington

Our vision is to create a community that is beautiful, affordable and healthy through wise use of land, building materials, energy and talent. Our goal is for the resulting community to reflect these values:

Social and community interaction emphasized

within cohousing, with the surrounding neighborhood and beyond

Respect and provision for individual needs including privacy.

Diversity of interests, lifestyles, ethnicity, ages and family structures.

Affordability, initial and long term.

Esthetically pleasing and ecologically sound design with use of materials and energy that lessens our impact on the environment.

Health promoting facilities and activities, including great food!

Puget Ridge Vision Statement

Seattle, Washington

In planning our community, we adopted the following Statement of Community Values:

Each of us comes to this group with a deep respect for both our shared values and our individual differences. Throughout this process we hope to take joy in our similarities and our differences, support each other's dreams and ideas, and thus strengthen the friendship that brings us together.

Community. We value friendship, sharing, learning, health, and cooperation.

Consensus. We are committed to making community decisions through a process where we each have a responsibility to participate and where everyone's voice is heard.

Diversity. We seek to enrich our group by including people of diverse backgrounds, such as ethnicity, age, race, religion, creed, sexual orientation, economic status and disability.

Family. We welcome families of all shapes and sizes. We want a safe, dynamic and nurturing place for everyone, and especially for our children.

Resource Conservation. We want a community which has low impact on the environment and energy resources and which minimizes the use of toxic materials.

Open Space. We wish to maximize open space in order to have play areas, organic gardens, and to preserve and re-introduce natural areas in the city.

The City. We have chosen to live in the city because we value it as a residential, economic, political, social, and cultural place.

Bellingham Cohousing

Bellingham, Washington

Our Mission is to create a diverse, multi-generational 32 unit neighborhood on the Old Donovan Farm in which its members are supportive of one another, share their resources, and strive to be good stewards of the land. We aspire to collaborate with the larger Bellingham community to build affordable housing in a mixed-income setting.

- We aspire to be a supportive community with a focus on spiritual growth which reflects each individual's path.
- We celebrate diversity.
- We hope our values will guide us to experience the sacredness in each other and everyday life.
- We make our decisions by consensus so that everyone will have a voice in the community.