



Southwest Boston CDC
Massachusetts DHCD CITC Community Investment Plan (CIP)
Adopted by the SWBCDC Board of Directors on March 13, 2017

Section 1: Community or Constituency to be Served

Southwest Boston CDC's primary target area for this CIP is the Hyde Park neighborhood of Boston. The primary constituencies that we serve in Hyde Park include low- and moderate-income households, immigrants and people of color.

43% of Hyde Park households earn less than \$50,000 a year, including 31% who earn less than \$35,000 a year. A BRA report from 2014 showed that 73% of Hyde Park's residents are people of color, including Latinos. This figure has been growing steadily over the last decades; in 1980 only 15% of Hyde Park's residents were people of color. According to 2014 census data, 29% of Hyde Park residents are foreign-born (largely from West Indian countries including Haiti, Jamaica, Trinidad and the Dominican Republic). 47% of residents are African American. 22% are Hispanic or Latino. 28% of residents are youth.

Our organizational focus is also on Roslindale, and some of our work under this CIP will support low-and moderate-income Roslindale families. In Roslindale, 42% of households earn less than \$50,000 a year, including 29% who earn less than \$35,000 a year. 27% of residents are African American and 24% are Hispanic or Latino. 29% of Roslindale residents are foreign born.

SWBCDC also has a focus on neighborhoods in Mattapan that are near Mattapan Square, which is part of a continuous corridor of low-income families of color, including many renter families, that extends north from River Street in Hyde Park into Mattapan.

Section 2: Involvement of Community Residents and Stakeholders

SWBCDC involves community residents at every level of the organization. We also regularly engage other local agencies to collaborate in our work and/or give input.

10 out of 12 of SWBCDC's Board of Directors are residents of Hyde Park or Roslindale. The remaining two are former residents of Hyde Park. The board is elected by the organization's grassroots membership at the annual meeting, which is an open community event. Anyone who cares about improving their community, completes a membership form, and pays dues (of the amount they can afford), can become a member of SWBCDC and vote on the board of directors. Empty board slots may be filled by a vote of current board members throughout the year. As we draft this CIP, the board is considering an application from a potential new Board Member who resides in the rental housing in Roslindale that we acquired in 2016. She is a strong leader in the tenants association that was formed there before we acquired it.

In 2016 SWBCDC completed a strategic planning process, which resulted in the creation of a one-year action plan with 3-year visioning. This planning process involved focus groups on the organization's program areas, each of which included representatives of allied agencies and also local leaders in the community. The Board and staff incorporated the input of these stakeholders into the final document.

Our Real Estate Development Committee, which makes recommendations to the Board regarding new affordable housing projects to pursue and also about managing existing projects, includes 2 board members and 7 residents of Hyde Park and Roslindale who are not board members but would

like to see more affordable housing in their communities. This committee take some responsibility for advancing the real estate development part of this plan.

In 2016 we filled a long vacant community organizer position; we are now in the process of expanding and deepening community involvement. The majority of our community organizing work to date takes place in Hyde Park. Our budding community organizing committee reflects the demographics of Hyde Park with regard to race and income and provides for the most meaningful involvement of community residents and stakeholders in our organization and in the community at large, outside of board membership.

The organizing committee grew out of an event in fall, 2016 when SWBCDC invited residents to a meeting at a vacant and blighted former playground, to discuss what they might like to see happen at that space. Since the committee was formed, it has held 6 meetings, involving a total of 29 individuals. Residents involved generally represent Hyde Park's demographics. They are overwhelmingly people of color, including African Americans who were born in this country and immigrants from Jamaica, Trinidad and the Dominican Republic. Members of the committee range in age from their mid 20's to mid 60's and represent tenants, homeowners, and young adults who live with their parents because they can't afford to move out. The overwhelming majority of participants are low-, very low- or moderate-income.

There are an additional more than 30 residents who have expressed interest, but who have not yet participated. These numbers are significant since the organizer only started in his position in July 2016 and was new to Hyde Park. He is now working to communicate one on one with these leads and build relationships that will result in their greater participation over time.

The organizing committee has identified core issues it cares about, which help inform SWBCDC's real estate development and community organizing strategies, as well as potentially other programs. Priority issues are (loosely in order of priority): affordable housing and other development that meet the needs of local low- and moderate-income families, cultural activities that reflect the community at large, reliable transit, and improved open spaces. Underlying all of these issues is the group's wish to have a voice in local decisions, which are now largely controlled by a small group of residents who don't represent the majority.

These residents are developing as leaders of their own efforts. With support from our staff, they are taking the lead in recruiting new members, chairing meetings, developing strategy, creating outreach materials and determining next steps in order to advance efforts to win positive changes in their community. In this way, they will play a significant and ongoing role in monitoring and implementing the aspects of the plan that relate to development of affordable housing, ensuring other developments meet local needs, improving transit on the Fairmount Line, creating a greenway in Hyde Park and winning reinvestment in the long vacant Doyle Playground.

Lastly, SWBCDC is the convener of Hyde Park Community Resources, made up of social service agencies and civic groups in Hyde Park that meet to stay abreast of each other's efforts and consider how to coordinate in order to respond to local needs. In 2016 SWBCDC engaged graduate students to update HPCR's 2009 Needs Assessment, with a focus on youth, for HPCR members' benefit. HPCR serves as one more resource that allows SWBCDC to connect to the local community, understand local needs, and identify potential community collaborations.

Planning processes that have set the stage for this CIP (in order from most recent to least recent):

January 2017 Greenway Visioning: Over 20 residents participated in a workshop to consider what Hyde Park's portion of the Fairmount Indigo Greenway should look like.

Fall 2016 Connection of Local Residents with Existing Coalitions: Budding leaders in our community organizing committee attended a Fairmount Greenway meeting with EPA representatives and another meeting of the Fairmount Indigo Network, in order to help inform their goals and how they may participate in the coalitions of which SWBCDC is a member.

September 2016 Doyle Playground Family Day: Over 25 residents participated in a meeting to discuss their interest in seeing DCR reinvest in the former Doyle Playground (now vacant and blighted), and the specific way they'd like the site redeveloped.

2015 - 2016 Strategic Planning: The Board of Directors initiated a strategic planning process in 2015. The process was completed in 2016 once the transition from interim executive director to permanent executive director was completed. As described above, that process engaged a range of community members and representative of other local agencies. The result was a one year action plan with an outline of a 3-year vision. That plan, and the work that has resulted since it was approved in the summer of 2016 greatly informs this CIP.

Spring 2016 – December 2016 Tenant Input Meetings: SWBCDC Staff, Board, and a representative from our property management company held group meetings and one on one meetings with tenants of the property we now own at American Legion Highway in Roslindale to collect input about how their housing is working and understand how we could improve management as their new landlord.

Feb – Oct 2013: Residences at Fairmount Station Resident Input: SWBCDC contacted nearly 45 neighborhood residents, business owners, civic association leaders, and staff of local elected for feedback on our affordable housing development proposal. During this time, we also formed Friends of Nott Street (FONS), made up of residents who wanted to support the development, which was not yet given a name other than its street address. Members of FONS played a central role in a passionate Article 80 public meeting in early January 2014 and in helping to advance this affordable housing development that they care deeply about.

October 2012 Charette for the Fairmount Corridor Planning Process: SWBCDC brought nearly 10 neighborhood residents to this event in Dorchester. A major focus of SWBCDC's CIP is the Fairmount Corridor, as it runs through Mattapan and Hyde Park.

Section 3: Plan Goals

1. Expand the number of affordable rental and homeownership units in Hyde Park, Roslindale and perhaps also the portion of Mattapan that is adjacent to Hyde Park, through new construction with a goal of 28 units completed and at least 50 new construction units in the pipeline by 2020; and through acquisition of existing units, with a goal of acquiring approximately 100 units by 2020. Units will be developed as part of a comprehensive approach to the community in which they will be located, with priority on developments in areas where SWBCDC is already working, and which provide infill or reuse of vacant or blighted lots, are transit oriented, support an increase in pedestrians in commercial districts, and/or incorporate features that local residents wants, potentially to include community meeting space and/or other services. Particularly for rental units, SWBCDC will work to take advantage of all available resources to provide the deepest levels of affordability possible.

2. Provide youth jobs and develop the next generation of Hyde Park leaders by continuing to run a youth jobs program in partnership with the Boston Department of Youth Engagement and Employment and the Boston Department of Parks and Recreation.

3. Fill gaps in services for low and moderate income residents in Hyde Park and Roslindale while also providing a path for residents to learn about opportunities to get involved with SWBCDC's community organizing activities.

4. Grow SWBCDC's organizational membership and pool of leaders, and, as a result, diversify the leadership of Hyde Park and Roslindale so that it better represents these communities' demographics with regard to race, income national origin and age.

5. Support a racially diverse base of local low- and moderate-income leaders in winning campaigns around one or more of the community issues that are of concern to them: affordable housing and anti-displacement, public transit, cultural activities, economic development and jobs, open space and environmental preservation. The benefit of these campaigns for residents will be that residents will feel comfortable in their community, believe in their ability to improve their community, have the capacity and power to make change, they will get to life in a community that is shifting in order to provide a built environment, services and a general quality of life that better meets their needs.

6. Build organizational stability and growth through the expansion of real estate development activity as well as expanded relationships with institutional and individual donors and through expansion of our membership base.

7. Ensure continued alignment among board, staff and our growing membership on organizational mission, vision and values and ensure internal documents are aligned as the organization expands its programs and membership base.

Each of these goals is intended to benefit low- and moderate-income families. The residents we are engaging in our community organizing work in Hyde Park and Roslindale are outraged at the continually rising cost of housing and want to see more homes that they and their neighbors can afford. The youth jobs and youth leaders we are creating come from low- and moderate-income households in our target area. The adult leaders of color we are helping to develop are overwhelmingly low- and moderate- income. They feel unable to insert their voice in the existing dialogue in their community and want more options to get involved – their involvement with SWBCDC is, to date, their only opportunity to shape their community into a place that serves their basic needs and meets their aspirational desires.

Our work to stabilize and grow SWBCDC, to update policies and to ensure alignment on the mission and vision will ensure that this organization continues to be able to effectively serve these communities with appropriate staffing and other necessary resources.

If we can accomplish the goals we have outlined above, low- and moderate-income residents of Hyde Park and Roslindale will have more local leaders that represent them with regard to race and income, they will see more proposals that better reflect what they want and need, and they will have greater ability to ensure their community evolves in a way that meets their needs. They will also be more secure in their housing and have greater access to services that may benefit them.

In addition, low and moderate income residents will discover that they are part of a larger struggle that exists throughout Boston and beyond for development, services, culture, transit and green spaces that reflects low income families' interests and not only the interests of profiteers.

Section 4: Activities to Be Undertaken In Order to Meet Stated Goals

We will undertake the following activities in order to reach each goal:

1. Expand the number of affordable rental and homeownership units in Hyde Park, Roslindale and perhaps also the Hyde Park adjacent portion of Mattapan through new construction with a goal of 28 units completed and at least 50 new construction units in the pipeline by 2020 and through acquisition of existing units, with a goal of acquiring approximately 100 units by 2020. We aim to see at least 15% of affordable units we create be for ownership, and the rest, rental.

The impact will be that the low- and moderate-income families who live in these units will have stable, healthy homes which will contribute to more financially and emotionally stable lives.

- Complete construction and see full occupancy of the 27-unit LEED Silver rental development, *Residences at Fairmount Station*, by September 2018 (in partnership with Traggorth Companies).
- Recruit local youth to join the YouthBuild Boston program and build a single family affordable home at 15 Ruskindale Road; provide significant marketing support to help identify qualified buyers for the lottery for the home.
- Partner with YouthBuild to pursue additional DND sites under the City's Neighborhood Homes initiative, in order to create 5 – 9 additional affordable homes for first time buyers.
- Hire SWBCDC's first real estate project manager by June 2018
- Maintain a robust real estate development committee that includes board members and a range of other local residents, which will help to identify new projects and make recommendations to the board of directors on projects to pursue. We will develop a process for communication between this committee and the leaders active in our community organizing work to ensure recommendations made by the real estate committee reflect the interests of our growing grassroots membership.
- Pursue other new construction and/or acquisition opportunities in Hyde Park and/or Roslindale potentially to include blighted lots adjacent to the *Residences at Fairmount Station*; vacant or underused sites on Fairmount Ave and River Street in Hyde Park which may provide mixed use opportunities with first floor retail; rental properties along the River Street corridor in Hyde Park and Mattapan, particularly those in which tenants are facing massive rent increase and dangerous code violations (we are currently working to make an offer on such a portfolio); DND owned properties in our target areas; underused sites on Belgrade Avenue in Roslindale which may provide mixed use opportunities with first floor retail; and other opportunities we will continue to identify.
- Continue to maintain and build strong relationships with potential development partners, with an understanding that for the next three years SWBCDC will need to partner on most deals in order to ensure adequate capacity with regard to staffing and our balance sheet.
- Develop and implement a plan to create and support tenant associations at SWBCDC properties that will enable SWBCDC to have healthy tenant-landlord relationships.

These activities will serve approximately 175 low-and moderate-income households, or approximately 525 adults and children (and countless more over decades to come), providing them with stable, decent and affordable homes and removing fears of displacement or homelessness.

2. Provide Youth Jobs and Develop the next generation of Hyde Park Leaders

The impact on our constituents will be local youth who are better prepared to secure and retain satisfying work later as young adults and beyond and who have the confidence, skills and community relationships to continue to grow as local leaders.

- Continue to offer our summer Green Team program to 15 – 20 youth (ages 15 – 22) each summer. The program includes training for youth on resume writing, interviewing, labor laws and workplace safety, teamwork, woods safety, urban landscaping, climate change issues, jobs relating to the environment, community organizing and more. Youth also gain hands on experience in restoring and improving urban wilds, including removing invasive weeds, creating trails, and creating and installing “no dumping” signs; as well as on other projects such as urban gardening.
- Build a connection between the Green Team and SWBCDC’s community organizing work; expand training on community organizing during the Green Team summer program, introduce Green Team youth to SWBCDC’s adult leaders, identify specific opportunities for Green Team (and other) youth to get involved in organizing campaigns with the adults in their community throughout the school year, and see at least 3 youth (22 or younger) stay involved during the school year each year.
- Seek funding to support a year round youth leadership program that will serve as a pipeline for local leaders in future years
- Hire a year round youth organizer/Green Team program coordinator by December 2018.

3. Fill gaps in services for low and moderate income residents in Hyde Park and Roslindale while also providing a path for residents to learn about opportunities to get involved with SWBCDC’s community organizing activities.

We will provide our Resource Connection program, a twice a week drop-in clinic which was initiated early in 2017. Hyde Park residents especially have a harder time accessing the same level of social service programs as many residents in other parts of the city, due to geography. This program will give residents a way to easily connect with a wide range of services while introducing them to our community organizing work and the opportunity to become more active in shaping their community. We have just initiated the Resource Connection in January 2017. The program will serve approximately 100 households a year during these its first three years and will include the following services:

- Job Referral Network: this is a program through our membership in the Fairmount Indigo CDC Collaborative. We help residents connect with employers and job openings specifically along the Fairmount line, as well as connect them into the Career Link program and in order to find a job and connect to job training as needed.
- Tenant Training & Support: We provide tenants with a basic overview of tenant landlord law and help them consider how to address urgent housing problems, as well as refer them to other services such as Metropolitan Boston Housing Partnership or Greater Boston Legal Services as needed for more intensive support or case management.
- Social Services Referrals: SWBCDC aims to become the place where any resident comes for help with any issue, because they know that we will connect them to a solution. We are developing a resource book that we will maintain in order to refer families to a wide range of services such as legal, medical, housing, childcare, taxes, youth programs and more.

We will also provide a regular English Spanish *Intercambio* which will enable residents not only to improve their English and pick up some Spanish, but -- through the topics of the conversations -- will also educate residents about local issues, introduce them to our community organizing work, and help them learn about each other’s cultures.

4. Grow SWBCDC’s organizational membership and pool of leaders and, as a result, diversify the leadership of Hyde Park and Roslindale so that it better represents these communities’

demographics with regard to race, income, national origin and age. The impact of this work on our constituency will be increased voice and influence of residents of color and low-income residents in decisions that directly affect them and their community.

- Continue to build on a community organizing program that SWBCDC initiated in 2016. This organizing work focuses heavily on developing the leadership skills of low and moderate income residents, including: communicating with other residents, chairing a meeting, telling a story, talking to the press, power analysis, identifying issues and desired solutions, research, and campaign development and implementation
- Connect with tenants in the tenants association that we will develop in our own properties so that SWBCDC tenants can get involved in our community organizing efforts, develop as leaders and become active in improving their own community.
- Develop leadership paths within the organization to enable new participants and members of SWBCDC to gain a range of opportunities for involvement and ultimately join the Board of Directors, as they are interested.
- While we would like the leaders we develop continue to serve as leaders with SWBCDC, we will also support leaders in accessing positions of leadership outside of SWBCDC as they are interested, including in local neighborhood associations and on the boards of other local groups such as the YMCA, branch libraries, Main Streets, Board of Trade and/or other Hyde Park or Roslindale based organizations.

5. Support a racially diverse base of low- and moderate-income leaders in organizing to winning campaigns around one or more of the community issues that they care about: affordable housing and anti-displacement, transit, cultural activities, economic development and jobs, open space and environmental preservation. The impact of these campaigns will be communities in which low- and moderate-income residents feel comfortable in their community, believe in their ability to improve their community and have the capacity and power to make change. These campaigns will also result in a community that better provides a built environment, services, and quality of life to meet the needs of all residents.

- Work with leaders to identify priority issues in Hyde Park and Roslindale. To date, most organizing work is focused in Hyde Park. As we develop more leaders we may be able to conduct more work in Roslindale. For the next three years, it is likely, however, that community organizing work will remain more focused in Hyde Park.
- Work with leaders to identify the solutions they would like to see and support leaders in crafting campaigns to win the changes they want. As of the drafting of this CIP, we expect to see the following campaigns over the next three years:
 - Influence which types of businesses come into the remaining sites at the Riverwood Shopping Center, located in a low-income neighborhood in Hyde Park and serving largely low-income people of color from Hyde Park and Mattapan. The current proposal would include a Burger King and Duncan Donuts, which local residents don't want. SWBCDC's community organizing committee has developed a goal of seeing businesses that are: healthy, locally based, kid oriented, provide good paying jobs and provide fun.
 - Influence new residential development in Hyde Park and Roslindale to ensure it has significant levels of affordable housing that reflects what current residents can afford, and that developments meet other needs, such as that for local jobs. There are currently nearly 900 apartments being proposed in Hyde Park among just three large market rate developments. There is currently a proposal for 90 apartments across the street from the property SWBCDC owns in Roslindale. Our tenants and other residents want to ensure that new development doesn't cause a hike in housing costs, and further the displacement that is already starting.

- Win approval from the Department of Conservation and Recreation to reinvest in Doyle Playground, a vacant and blighted lot next to the Riverwood Shopping Center along the Neponset River, which provided the only playground in its neighborhood. As part of this reinvestment, secure approval from DCR to implement a nearly 10 year old DCR plan to create a walking path along the Neponset River on DCR land that would connect Fairmount Station to Riverwood Shopping Center, passing by the West Street Urban Wild and Doyle Playground on its route. Part of this campaign would happen in collaboration with groups in Mattapan such as Mattapan United and/or Mattapan Food and Fitness, since the same greenway would come through their neighborhood.
- Win investment in the clean-up of the Hyde Park portion of the Neponset River, both to address toxins in the sediment, but also to address an overdue court order relating to sewage that has drained into the River and was never cleaned. This may happen in collaboration with groups in Mattapan such as Mattapan United and/or Mattapan Food and Fitness, who face the same concerns.
 - Build connections with groups in other parts of the city who are also focused on ensuring new development meets local needs, and starting to build a network of residents throughout Boston who are influencing what gets built and for whom. Start to identify ways for these different pockets of residents to support each other across neighborhoods in order to meet shared goals for affordable housing, local jobs and other needs.

6. Build organizational stability and growth through the expansion of real estate development activity as well as expanded relationships with institutional and individual donors and through membership expansion.

- Implement the fundraising plans outlined in the financing section of this CIP, including establishing an operating reserve for the first time.
- Maintain a steady real estate development pipeline and manage existing housing properly.
- Have the Executive Director work with the accountant, finance committee and the rest of the Board of Directors and consultants as needed to analyze the organization's finances as we expand our income, and consider how best to spend new resources to most effectively meet our mission.

7. Ensure continued alignment among board, staff and our growing membership on organizational mission, vision and values and ensure internal documents are aligned.

- Review (and as necessary update) the organization's mission, values and vision.
- Review and update the bylaws (including a review and update of the membership policy), personnel policy, logo and website as needed to ensure internal systems and external messaging and communications align and support our mission, values and vision
- Implement a real time strategic planning method at the board, staff and committee level to allow all new decisions to be filtered through an organization-wide shared understanding of goals, mission and vision.

These final two areas of activity (numbers 6 & 7) will ensure the longevity and effectiveness of SWBCDC, which will enable all of the other goals and activities mentioned above to positively impact our constituencies.

Section 5: How Success will be Measured

Southwest Boston CDC uses a database in Salesforce to track donations, membership participation, levels of leadership, services provided and other details. The database was newly established in 2016. Each staff person is responsible for inputting data relating to his/her program, or for providing

the data to our Office Assistant to input into the database. We track attendance at committee and board meetings and at other organization-hosted events, types of leadership activities undertaken by the residents in our organizing program, the kinds of services provided to residents who seek help with housing, job search or other needs, and donations from individuals and institutions. Using this database and by separately tracking the outcomes of other work such as real estate and improvements made via organizing campaigns, we will measure success in the following indicators, shown here with the staff person who most owns that data:

- Number of new donors, both institutional and individual, the number of donors retained each year, the number of donors who increased their gifts each year and the total amount of funds raised each year. (*Board of Directors and Executive Director*)
- Number of new residents involved with POHWER annually, the number of residents who are emerging as leaders, and the amount of total participation by all members. We track residents' involvement with the organization by ranking their level of leadership on a score of 1 – 5, and by tracking the number of times that people participate (i.e. by attending a committee meeting or another event or by investing time to help plan an event). (*Community Organizer*)
- The extent to which the organizing committee and its wider constituency win the specific campaign goals it sets. (*Community Organizer*)
- Number of residents who receive social service support from our Resource Connection program (*Assistant Director/Program Manager*)
- Number of residents whose problem was resolved or who was successfully referred after visiting our Resource Connection program. (*Assistant Director/Program Manager*)
- Number of residents who receive direct services from SWBCDC and then continue to participate with SWBCDC on one of our committees. (*Community Organizer*)
- Number of youth who participate in the summer Green Team program and also in year round efforts after the Green Team summer program ends, and the level of leadership they demonstrate. (*Community Organizer and Assistant Director/Program Manager*)
- Number of affordable housing units completed and in the pipeline: predevelopment, financing, and construction (*Executive Director and Real Estate Project Manager, once hired*)
- Number of residents in our own housing developments that are involved with SWBCDC programs in addition to being a tenant of SWBCDC. (*Community Organizer*)
- The extent to which our board reflects the Hyde Park and Roslindale communities with regard to income, race and national origin (*Executive Director*)
- Completion of a process that results in consensus on our mission, vision and values, logo, website, by-laws, and personnel policy – either to retain the versions we have now or to update some portion of them. (*Executive Director*)

Section 6: Collaborative Efforts to Support Implementation

Partnerships are essential for Southwest Boston CDC to meet the broad and complex goals that our members have for Hyde Park and Roslindale. Our work relies on collaboration with the following organizations to meet mutual goals:

Real Estate Development Partners: SWBCDC expects to rely on partners to advance most of our real estate development projects over at least the next 3 years until our staffing and financial capacity is more robust. We are in a partnership with for-profit developer, Traggorth Companies, to develop the Residences at Fairmount Station. They bring expertise and a balance sheet that enables the acquisition of financing and award of LIHTC. Traggorth focuses on investing in blighted areas and restoring urban life through the built environment and partnering to create affordable housing. When Traggorth joined as a partner, work had already been completed to identify the site, secure

permitting and develop early budgets and designs. Given Traggorth's significant role now in helping SWBCDC move this project to completion, they will realize 65% of the development's fee and overhead. We are deepening or newly developing relationships with other potential partners such as Codman Square Neighborhood Development Corporation, POAH, Winn Companies and others in order to be ready when new opportunities arise.

City of Boston Parks and Recreation: Parks and Recreation will continue to serve as a key partner for the Green Team. They provide workshops for our youth on landscaping techniques and urban wild restoration, and manage the scope of work our youth conduct at the urban wilds.

Boston Department of Youth Engagement and Employment: DYEE pays the wages of the youth in our Green Team summer jobs and environmental stewardship program.

University Researchers: As we and our leaders work to understand the issues on the ground, raise funds, and effectively frame the issues, we need additional data. SWBCDC will continue to partner with universities to complete vital research projects at little or no cost to SWBCDC. Currently we have two projects underway: graduate students from Wheelock College are updating a 2009 Hyde Park Needs Assessment, with a focus on youth needs. Tufts graduate students are studying the tipping point for the level of transit service that is attractive enough to spur an increase in housing costs, gentrification and displacement in a community. We expect to retain other student teams to address research needs as they arise over the next 3 years.

YouthBuild Boston: We have worked with YouthBuild to develop a universal design home that could serve a model for DND sites that go out to bid under the Neighborhood Homes initiative. That design is now being implemented at one site in Hyde Park. We will partner with YBB to develop several additional sites we have identified in Hyde Park, Roslindale and Mattapan with YouthBuild as the builder and SWBCDC as the partner to solicit community input, recruit local youth for the YouthBuild apprenticeship program and help market the home. This partnership may yield a very small fee for SWBCDC to cover our staff time to support this work.

Boston University School of Social Work: To augment staffing, we retain an unpaid social work fellow each year via the BU School of Social Work. The fellow works 2 – 3 days a week, receives direct experience towards his/her degree and is supervised and trained by SWBCDC's Assistant Director, who has a social work degree. The Fellow staffs our Resource Connection program, including the job referral network, basic tenant training and referrals for other services; connects clients of the social service work to the community organizing work; coordinates the Hyde Park Community Resources quarterly meetings and helps with planning and implementation of the Green Team program.

Fairmount Indigo CDC Collaborative (FICC): Most of SWBCDC's anti-displacement, real estate development, open space and transit work focuses on the area along the Fairmount line corridor in Hyde Park. We have a long standing collaboration with Codman Square NDC and Dorchester Bay EDC – our two partners in FICC – to make all of our efforts in these areas stronger through the development of shared strategies, coordinated implementation of strategies, shared information, and shared fundraising. 18% of SWBCDC's FY 2016 budget came from grants raised jointly via FICC. We expect this percentage to continue going forward.

Fairmount Indigo Network, Fairmount Greenway and Fairmount Transit Coalition: SWBCDC is also active with these wider networks of groups working along the Fairmount Line. Fairmount

Greenway staff conducts research and help to advance the greenway concept. SWBCDC members serve as the Hyde Park representatives to the Greenway, working to advance the Hyde Park portion and ensuring that the regional plans reflect local interests. SWBCDC's work to improve transit on the Fairmount Line happens in part through the Transit Coalition which brings together a broad base of groups to back the agenda for improved service on the line.

Greater Boston Grassroots Groups with a Development Focus: We will partner with other grassroots groups throughout the region who are also focused on greater resident control over local development issues, such as Keep it 100% for Egelston. Our members and theirs will meet to share ideas on strategy, and gain a sense of support and camaraderie in the effort to form a city that provides what local low- and moderate-income people need and want.

Members of Hyde Park Community Resources (convened by SWBCDC): local churches, social service agencies that serve Hyde Park and representatives of local neighborhood associations all participate in this coalition that SWBCDC convenes. This partnership enables us to connect more widely with local residents (via the agencies where they may receive services or their churches), allows us to understand better the issues our members face, and provides us with vital information about current services in the area.

City Life /Vida Urbana: We have been partnering with City Life around a large portfolio of apartments in Hyde Park and Mattapan where tenants are facing rent increases of \$200 - \$600 and (in some cases) gross violations of the health code. This partnership has allowed SWBCDC to identify more residents to involve in our community organizing committee, while we have helped City Life connect to more tenants to engage in the tenants association it is forming. As a result of this relationship with City Life, SWBCDC has sought to purchase these properties, an effort that will continue in the near future.

Section 7: Integration of Activities with Community Strategy and Plan

The elements of this plan are part of one comprehensive community strategy to ensure low- and moderate-income residents, and residents of color, have a say in development and other decisions in their communities, that there is adequate housing with costs reflecting the incomes of current residents, that families are not displaced, that we expand transit service, and that we take other actions to improve the quality of life for all families such as through improved parks, cultural resources and other amenities.

Several elements of this CIP are geographically close, allowing SWBCDC to have greater impact in implementing our comprehensive approach. The *Residences at Fairmount Station*, Doyle Playground, the proposed Hyde Park portion of the Fairmount Greenway, the Riverwood Shopping Center where residents seek to influence the kinds of stores that are added to the site, and the portfolio of rental units in which tenants are facing massive rent increase and dangerous code violation that we are pursuing for purchase, are all within half a mile from each other and from Hyde Park's main commercial district and from Fairmount Station itself.

Additionally, the social services we are provide (Job Referral Network, English-Spanish *intercambio*, tenant training, and referrals to other services) not only to fill social service needs, but allow SWBCDC staff to meet more residents. In this way we can introduce them to the opportunities SWBCDC provides for residents to get involved in making improvements in their community and developing as leaders. Developing affordable housing also allows SWBCDC not

only to provide this vital need to local families, but to connect with more tenants who we may connect to social services was needed, and also to the community organizing work.

This CIP aligns with the BRA’s 2011 Hyde Park Master Plan, which describes this vision for Hyde Park: *“Hyde Park should be an attractive, vibrant, and safe neighborhood that: Celebrates its unique cultural and urban diversity, and natural and historic resources; Provides housing, jobs, commercial and recreational opportunities for a diverse population; Supports and encourages the expanding creative economy; and is Innovative in the reuse/redevelopment of underutilized buildings and parcels.”* These recommendations from the plan directly align:

Residential Districts: *“ensuring that the community continues to embrace its diversity through the provision of diverse unit sizes and affordable housing”*.

Commercial Districts: *“Attracting and maintaining a better mix of stores and services to serve both residents and patrons from outside the neighborhood...Encouraging mixed-use (any combination of retail, office and housing) to create more lively commercial districts.”*

Industrial Districts: *“preserve Hyde Park’s industrial legacy through maintaining key industrial districts for continued industrial use, continuing to look for emerging industries that can be attracted to Hyde Park, and ensuring that zoning and other regulations continue to support those industrial uses which bring jobs and economic vitality to the community.”*

Open Space: *“Protecting and expanding access to open space ...support of the proposed Fairmount Greenway which will follow the Fairmount Commuter Rail corridor”*

Transit: *“advocating for more frequent MBTA commuter rail service and reduced fares”*

Sustainability: *Diversity of housing types, sizes, income level... A variety of open space types...A variety of multi-modal transportation choices with fully connected pedestrian and bicycle routes...Preservation of natural terrain and vegetation...Clean up and reuse of former industrial properties...support of mixed commercial and residential use...Citizen and stakeholder participation.*

This CIP also aligns strongly with the City of Boston’s Imagine Boston 2030 Plan in that it will engage residents in making plans for their own communities, create affordable housing, work to advance better service on the Fairmount Indigo commuter line, connect residents with jobs, contribute to efforts to strengthen the commercial base in Readville and to efforts to establish a business association for Readville businesses, and educate youth and the public about environmental stewardship and climate change. These efforts are all items that are prioritized in Imagine Boston 2030, which is emerging as the core document outlining the city’s development goals for the next 23 years.

Section 8: Financing Strategy

This 3-year plan is expected to cost \$1.31 million and will be financed via a range of sources. Every income sources listed is one that SWBCDC has used successfully in the past. However we will be implementing new strategies for better securing some of these funds going forward:

Income Expected to Support This CIP, 2017 – 2020:

Developer Fees:	\$367,040
Government Grants:	\$143,000
Grant Income Raised by SWBCDC Directly:	\$330,000
Grant Income via Fairmount Indigo CDC Collab:	\$225,000
Individual Donors (CITC):	\$79,000
Individual Donors (smaller gifts):	\$39,000

Corporate Sponsors (mostly CITC gifts):	\$116,500
In Kind Donations (legal, consulting, MSW fellow):	\$120,940
Total Income Expected:	\$1,420,480

Net income will be used to initiate the organization’s first ever operating reserve.

CITC Income (for 2017 allocation only) of \$60,000 credits

(these figures are subsets of the figures shown above)

Grant Income Raised by SWBCDC Directly:	\$17,500
Individual Donors, including board members:	\$22,000
Corporate Sponsorships	\$35,500
Allocation to United Way*	<u>\$45,000</u>
Total Income for \$60,000 in 2017 credits:	\$120,000

**SWBCDC has approximately \$20,000 in credits remaining from our prior allocation. Some of these credits may be used in late winter/early spring 2017 before this CIP term begins. We also may allocate more credits to the United Way as needed to ensure we expend remaining prior credits as well as our 2017 allocation.*

Developer Fees and Overhead Payment: SWSBCDC will realize approximately \$30,000 in deferred fees from our American Legion Highway project, out of cash flow annually. We will realize a total of approximately \$315,000 in developer fees and overhead payments from the Residences at Fairmount Station between June 2017 and December 2018. We may earn modest fees if we repeat a project like that at American Legion Highway which did not require significant rehabilitation and so was a relatively fast acquisition project, resulting in a fee at closing. However, this is less likely so we are not budgeting at this time for additional fees during the next 3 years beyond those for projects already underway. Fees from projects initiated during this CIP will be earned after the term of this CIP has ended.

Grant Income: SWBCDC has deep experience applying for, reporting on and properly expending grants. We expect to raise at least \$330,000 in grant income to fund this 3 year plan directly. During the last two calendar years SWBCDC raised less in grant income than is expected going forward due to funders’ concern regarding the organization’s ability to overcome the zoning lawsuit facing its real estate development project and uncertainty before a new executive director came on board to replace the interim director. In 2016 and 2015 SWBCDC raised \$27,500 and \$28,000 in grant income, respectively.

Grant income is expected to increase significantly in coming years now that SWBCDC has a new Executive Director with demonstrated success in grant writing, now that our real estate development program is progressing and now that we have expanded programs of community organizing and social services. In the last three months, SWBCDC added two new grant funders and has been invited by two foundations who have not funded the organization in 5 years and 13 years (the former of which is by invitation only), to submit letters of interest.

We also expect to raise \$225,000 in grant income for SWBCDC via joint proposals submitted by the Fairmount Indigo CDC Collaborative. SWBCDC’s grant income from joint proposals of FICC totaled \$59,027 in calendar year 2016. FICC grant income has dropped in recent years, but FICC has recently increased outreach to funders to educate them about our recent successes and future intentions. We have has seen some renewed interest in our work and will leverage it.

City of Boston CHDO Funds: SWBCDC has been supported by City of Boston CHDO funds since 2003. We expect to see \$45,000 in CHDO funds over the course of the 3 year CIP, to support real estate development activity.

Individual Donations: SWBCDC's board and Executive Director will be implementing a personalized individual donor plan in order to connect one on one with existing donors, and invite all new participants with the organization to become paid participants/members. While we look to retain and expand our CITC donors, the focus will be on engaging and retaining donors at all levels, while adding new CITC and smaller donors each year. In this way, SWBCDC will continue to grow our unrestricted income steadily each year. The Executive Director will be inviting all donors of gifts of at least \$500 to meet with her to talk about their hopes for the organization, and to discuss their giving levels for the upcoming year. We will also build on relationships we have with residents in Dedham and Milton, who see Hyde Park as a neighbor they'd like to support, in order to expand our connection with like-minded residents in those neighborhoods. This work will involve one on one meetings, house parties and coffee hours at churches to build relationships. We expect to raise \$33,000 between CITC gifts and smaller gifts during the next 12 months, with increases of \$5,000 - \$9,000 a year in this area.

Corporate Sponsorships: SWBCDC's 15th anniversary gala demonstrated that many corporate allies want to contribute. While we will not do a large gala each year until staffing capacity grows, we will solicit sponsors for our annual meeting, which we have not regularly done in the past. This will provide an avenue for corporate sponsors to continue investing in our work with CITC (and smaller) donations. The Executive Director will be reaching out in person to former sponsors to thank them and talk to them about their interest in the work, and how they might like to support it in the coming year.

Section 9: History, Track Record and Sustainable Development

Southwest Boston CDC has a long track record of success, which has become stronger during the past two years. Highlights of earlier successes include:

- Organizing to Preserve Expiring Use Units: Between 2004 and 2008 SWBCDC partnered with City Life / Vida Urbana and the Massachusetts Alliance of HUD Tenants to organize tenants of the Florence Apartments and Weld Park senior affordable apartments, both in Roslindale. SWBCDC staff spent many hours reaching out to tenants to involve them in the effort. These were "expiring use" developments at risk of going market rate and displacing tenants. Our collaborative work was successful and these 140 units were preserved.
- Founding Member of Fairmount Indigo CDC Collaborative: SWBCDC collaborated with CDCs along the Fairmount rail line to form the Fairmount Indigo CDC Collaborative. The collaborative focused on adding stops, reducing fares, prevent gentrification and displacement, creating transit oriented affordable housing and other development, and expanding green spaces and a greenway along the line. In prior years, with SWBCDC as an active partner, FICC won new Fairmount Line stops, lowered fares and funding for publicity, including to support a multi-location "Lighting of the Line" event, for which SWBCDC held a large festival by Fairmount Station in Hyde Park. SWBCDC continues to play a vital role in FICC, as we continue to advance goals to prevent

displacement, improve transit service, connect residents to jobs and develop a greenway along the line.

- Initiation of Youth Jobs and Environmental Stewardship Program. In 2009 SWBCDC developed and initiated our Green Team youth program. Since 2009 we have hired over 125 youth ages 15 – 23 to work over the summer in the local city-owned Urban Wilds, including Dell Ave, DeForest, Monterey Hilltop, Mother Brook, Sherrin Woods and West Street Urban Wilds. This program has involved a vital partnership with the Boston Department of Parks and Recreation, which sets the scope of work for the urban wilds. In 2014 the Green Team became the first program in the city of Boston to use goats for landscaping. The Green Team’s use of goatscaping helps to remove significant overgrowth of poison ivy and other invasive plants from the city’s urban wilds. Since inception, the program has also included job readiness and leadership development training and environmental education, as well as training on how to use the range of tools the youth must yield in their urban wild restoration work. 90% of Green Team youth live in Hyde Park or Roslindale and come from low- or moderate-income families. Over 90% are kids of color. Many youth return subsequent years to continue their growth as leaders and environmental stewards. Paul Sutton of the Parks and Recreation Department has noted, “*SWBCDC's Green Team Program has been invaluable in restoring and beautifying numerous natural areas in Hyde Park. The Boston Parks Department highly values the accomplishments of our multi-year partnership with the Green Team.*”

- Affordable Homeownership Opportunity: in 2012 SWBCDC and a development partner completed the rehabilitation of a 3-family home at 990 River Street in Hyde Park which was sold with affordability restrictions to a moderate-income first time homebuyer who must rent at least one of the other units to another moderate-income family.

- Convener of Hyde Park Community Resources: SWBCDC has successfully convened this group for several years. The first meeting after a two year hiatus saw a packed room of over 25 attendees, showing the interest and need for the group and the community’s confidence in SWBCDC’s ability to make the coalition useful for them.

More recent successes, upon which this plan will build include:

- Acquisition of 875-889 American Legion Highway: SWBCDC became the first organization to use funding from the City of Boston’s new Acquisition Opportunity Program when we purchased our first property at 875- 889 American Legion Highway. SWBCDC’s Executive Director initiated and managed difficult negotiations with the sellers. SWBCDC’s real estate development consultant developed and helped SWBCDC implement the acquisition budget, which included using a type of tax exempt bond not typically used for housing. This building is important because all 8 units have 4 bedrooms and a sale on the private market would likely have resulted in rent increase and risk of homelessness for these large low-income families. In addition to \$600,000 in City funds, SWBCDC received predevelopment financing from CEDAC and permanent tax exempt bond financing from Boston Private Bank, with bonds from Mass Development. Maloney Properties is managing the property out of their Mattapan office. Since purchasing the property we have completed minor upgrades, including replacing front staircases and storm doors. With Maloney as the property manager, we will continue to make improvements to the property over time. This deal provided SWBCDC with over \$58,000 in fees which enabled the hiring of a Community Organizer. We expect to receive approximately \$60,000 in deferred fees over the next 6 – 7 years out of cash flow.

• Permitting and Financing of Residences at Fairmount Station: In 2015 SWBCDC met a major milestone with the permitting and award of City funds for its first new construction project. SWBCDC had advanced several sound proposals in earlier years; however a small but powerful base of local opposition was able to prevent prior proposals from moving forward. In 2016 the development was awarded financing from DHCD. This development represents the first family affordable housing to be created in Hyde Park in nearly 25 years. As SWBCDC is expanding its membership through its community organizing work, we are finding that nearly every new resident we meet is strongly supportive of more affordable housing for Hyde Park. We will use this growing base of affordable housing supporters to make the path for future sound affordable housing developments smoother than those that have come before.

• Expansion of Fundraising over last three years

During FY 2013 SWBCDC raised only \$4,625 from individuals. During FY 2014 we raised \$9,375. In FY 2015 we raised \$21,750 and in FY 2016 we raised \$31,700. This demonstrates our ability to increase our fundraising and to take advantage of a tool like CITC to do so.

• Revival of Community Organizing Work

SWBCDC has a history of successfully organizing residents around important issues, such as preserving expiring use housing, improving MBTA service and advancing new affordable housing developments. We are building on that past, now that we have filled a long vacant community organizer position. In the last 7 months since we revived this work, we have already started to engage more than 50 residents who are new to the organization in this work, and they are starting to advance efforts around open space, housing and other development issues.

Our plan strongly aligns with the Commonwealth's Sustainable Development Principles:

1. Concentrate Development and Mix Uses: Our work is focused on improving the urban cores and neighborhoods of Hyde Park and Roslindale. The Residences at Fairmount Station will transform a blighted former auto parts business into new housing within steps of a rail stop. We are pursuing additional developments adjacent to that site to continue to transform this blighted area into transit oriented residences that will reclaim and reconnect this area to the immediately adjacent commercial district.
2. Advance Equity: Our work is rooted in equity. We work in Hyde Park and Roslindale because these communities have large populations of low income families and people of color whose voices are not heard, and who are negatively impacted by the decisions being made by others. Our organizing work develops leaders from among these populations who we support in influencing local decisions. Our work to develop affordable housing, win investments in blighted open spaces and a polluted river, provide youth jobs and train tenants on their rights all directly contribute to greater social, environmental and economic justice.
3. Make Efficient Decision: As a real estate developer and an active member of the Massachusetts Association of CDCs, SWBCDC strongly supports efforts to make the permitting process clear and predictable.
4. Protect Land and Ecosystems: Our work to advance a greenway along the Fairmount line includes helping to revive stalled efforts to clean up the Neponset River. Our Green Team restores urban wilds that have been overcome by invasive weeds and illegal dumping.
5. Use Natural Resources Wisely: Our Residences at Fairmount Station will be LEED Silver certified (or certifiable) and we seek to balance cost with environment protection and safety in all of our real estate developments. We prioritize the creation of affordable housing close to transit and within walking distance of shops and other destinations not only because that make it easier for tenants, but also because that reduces car trips and air pollution.

6. Expand Housing Opportunities: a primary CIP goal is the affordable rental and ownership housing development in Hyde Park and Roslindale through acquisition and new development, with a mind for reuse, infill, transit orientation, community need and walkability.
7. Provide Transportation Choice: Through the Fairmount Indigo CDC Collaborative and the Fairmount Indigo Network, we are committed to seeing the Fairmount Indigo line improve service and increase ridership, allowing Hyde Park residents to much more easily access jobs, nightlife and other vital destinations.
8. Increase Job and Business Opportunities: SWBCDC connects local residents to jobs along the Fairmount Line and beyond through the Fairmount Indigo Jobs Referral Network. We also connect local small businesses, as relevant, to our CDC partners who provide small business technical assistance and loans. Under this plan we will be continuing outreach to businesses in the Readville part of Hyde Park and supporting efforts to start a business association there. A Readville business association could improve conditions for businesses, attract new businesses, better market those businesses, and better market job openings to the public.
9. Promote Clean Energy: Our Green Team teaches youth about climate change and the actions that we can all take to reduce our use of energy and protect our environment. Our Residences at Fairmount Station development will be LEED Silver, and we are incorporating energy saving systems where possible. Improving transit on the Fairmount Line is a priority, which – if the transit was reliable and affordable from all stops – would reduce car trips from Hyde Park to other parts of the City.
10. Plan Regionally: As a member in the Fairmount Indigo CDC Collaborative and the Fairmount Indigo Network, SWBCDC is taking a regional approach with partners up and down this transit corridor to address displacement, affordable housing development, improving transit, and expanding green spaces.