Community Investment Plan 2017 to 2019

Executive Summary

Fenway CDC was one of Boston's first CDCs, founded in 1973 by neighborhood residents to address gentrification and stabilize the Fenway neighborhood. Over the past four decades, Fenway CDC developed and preserved affordable housing, engaged residents to improve their neighborhood, and provided programs and services to improve the economic and social well-being of families and individuals in the Fenway and Boston neighborhoods.

Fenway CDC successfully achieved the following accomplishments for our Community Investment Plan from 2014 to 2016 through increased CITC funding and operational capacity:

1) ***Housing Development and Preservation***

- Continued to provide safe homes for 450+ residents through 7 residential properties
- Secured Burbank Gardens - a new housing preservation project of 52 units which we will announce in April 2017, and we are currently cultivating potential housing projects to increase future stock of mixed-income housing

2) ***Resident Services and Workforce Development***

- Sustained our program to help residents access social services to stabilize their lives
- Increased our activities to provide residents with job skills training and placement services
- Expanded our services to include Fenway Fair Foods program where residents have access to affordable fresh food and nutrition education
- Expanded our financial education and counseling services to reach more residents

3) ***Community Planning and Organizing***

- Engaged resident leaders and collaborated with community partners to suggest improvements for the City's housing policy to create new stock of mixed-income housing

Fenway CDC successfully distributed 100% of our 2014 tax credits of $80,000 and 2015 tax credits of $150,000. In 2016, we distributed 87%, $130,700 out of $150,000 tax credits. We submitted CITC forms with $55,700 of tax credits to DHCD, and United Way distributed $75,000 of our remaining tax credits. Over the past three years, we successfully engaged existing investors who increased their support and attracted new investors through our annual Fenway Ball. We also innovated by creating new fundraisers – Fen-tastic Fest and Taste of The Fenway, see Attachment D. We are requesting $150,000 in Community Investment Tax Credits for 2017 to sustain and expand our work to accomplish the following goals:

- Create a housing pipeline of affordable units to be acquired and rehabbed;
- Expand resident participation in civic engagement to tackle housing and social issues (e.g.: gentrification, crime prevention, social injustice) affecting the neighborhood and city;
- Improve the quality of life of residents by providing access to social services, education, job readiness training, employment opportunities, food, and health improvement programs; and
- Collaborate with community partners, businesses, and institutions to improve cultural programs, transportation options, disability access, job skills training and placement services, and to support the survival of small local businesses by promoting economic development.

Section 1: Community or Constituency(ies) to be Served by the Organization

Since its inception, Fenway CDC has served the Fenway neighborhood in Boston, Massachusetts. Our service area is bounded by Massachusetts Avenue, Huntington Avenue, Longwood Medical Area, and Commonwealth Avenue. Our target population consists of low-income and moderate-income households occupying the roughly 12,300 rental units in the Fenway. About 80% of our service program participants are Fenway residents and 20% come from other Boston neighborhoods as we partner with community organizations and CDCs. Our Community Planning and Organizing department works to advance the Fenway's Urban Village Plan - a sustainable, smart-growth model where residents, businesses and institutional neighbors thrive together. (For more information on the Fenway's Urban Village Plan, visit www.fenwaycdc.org/urban-village.html). Fenway CDC will continue to build a healthy, safe and vibrant neighborhood for residents, workers and visitors.

Demographics

According to the 2015 US census, the total population of the Fenway was 32,210. The census counted 11,101 households and 1,319 families in the neighborhood. The racial makeup of the population was 61% White, 18.7% Asian, 11.5% Hispanic, 5% African American, and 3.8% from other races. Of the neighborhood population, 28% were younger than 19-years-old, 54.6 % were between the ages of 20 to 34, 9% were aged 35 to 54, 3.9% were aged 55 to 64, and 4.5% were 65-years-old or older. Between 2011 and 2015, 57% of Fenway residents were enrolled as undergraduate college students.[1]

Geography

The Fenway is home to 14 colleges and universities, and while these institutions are important drivers of regional economy, their students add significant pressure to the local housing market. Fenway CDC continues to partner with these institutions to provide civic engagement and service-learning opportunities in which students participate in our programs to serve low- and moderate-income residents. Since 1994, we have forged several partnerships with institutions to create and sustain a workforce development program to promote economic development for both residents and the institutions. We continue to encourage institutions to house more students on campus - which will relieve some pressure from the Fenway housing market and facilitate opportunities for the creation of affordable, non-student housing in the Fenway.

Economy

According to the Boston Redevelopment Authority's March 2014 "Poverty in Boston" report, 43.7% of the households in the Fenway live below the poverty level compared to 21.6% citywide. The same study also reported that over 40% of Fenway residents have spent *half or more* of their income on rent. The unemployment rate in the Fenway is approximately 9.8%.[2]

According to a 2013 study by Harvard's Joint Center for Housing Studies, rents in Greater Boston were the third highest among the nation's metropolitan areas. An October 2013 study conducted by Northeastern University showed that rents in Greater Boston had risen to an average of $1,800 from $1,300 a decade earlier. Rents for a two-bedroom apartment in the Fenway currently start at $2,500.

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[1] Source: U.S. Census Bureau, 2011-2015 5-Year American Community Survey

[2] http://www.bostonplans.org/getattachment/01cef762-956d-4343-a49a-b41c280168ae/

Section 2: Involvement of Community Residents and Stakeholders

Mission

Fenway CDC is a membership organization devoted to enhancing the stability, sustainability, and diversity of Boston's Fenway neighborhood by providing opportunities for all residents to thrive in the community with a focus on low-income and moderate-income families and individuals.

We accomplish this by developing affordable housing, linking neighbors with jobs and training opportunities, providing services to individuals, families, and seniors, and engaging residents to ensure they have a strong voice in their community's future. We seek to capitalize on opportunities and address challenges that arise from the Fenway's unique location in the city of Boston and the high concentration of world-renowned academic and medical institutions in our neighborhood.

Fenway CDC strives to improve and maintain diversity, accessibility, and social cohesion with community stakeholders. The expansion of institutions and increased private developments continues to drive up housing costs in the Fenway. The acquisition and creation of a substantial number of affordable housing units in the neighborhood is key to meeting the housing needs of lower-income residents. To address this need, Fenway CDC plans to invest in building the capacity of its Housing Department with a stronger focus on real estate acquisition.

Fenway CDC addresses three program areas. Please see our program logic model at Attachment B.

1. Housing Development and Preservation

Since being established, Fenway CDC has developed and preserved nearly 600 homes housing thousands of residents. We currently own and manage 257 units of mixed-income housing. We work closely with institutions, government, residents, and private developers to forge housing partnerships. We are in the process of acquiring and rehabbing a 52-unit expiring use development on Burbank Street in the Fenway. We hope to protect the tenants from displacement and preserve the long-term affordability of this mixed income development.

2. Community Planning and Organizing

Our grassroots planning initiative work engages residents in expanding and updating Fenway's Urban Village Plan, builds the working structure, and develops community leadership capacity to implement it. We collaborate with residents, working professionals, community organizations, issue-specific interest groups, local institutions, elected leaders, and others to develop support throughout Fenway and Greater Boston. Our activities are guided by a diverse and inclusive coalition which includes elders and families, low- and moderate-income individuals, immigrants, the disabled, and community partners.

3. Resident Services

Our "Walk to Work" workforce development program and resident services help low- and moderate-income residents to access housing, social services, job skills training and placements, health improvement programs, and education advancement opportunities. We serve a diverse population including children, youth, families, formerly homeless veterans, disabled people, members of LGBT community, and senior citizens.

In 2016, Fenway CDC engaged over 1,700 residents and stakeholders through 235 activities, planning meetings, and community events, see Attachment E for our community engagement report.

1. Membership

Fenway CDC has 127 dues-paying members who reflect the community's diversity, with low- and moderate-income residents and people of color well represented. Our members elect up to 16-members of a volunteer board of directors at our annual meeting, and these members in turn elect 3 additional members who share Fenway CDC's goals and mission. We engage our members through community meetings, educational workshops, and community-building events. In May 2016, approximately 150 members and community stakeholders (residents, community partners, benefactors, and elected officials) attended our 43rd annual meeting celebrating the community-building efforts and accomplishments of Fenway CDC.

2. Board of Directors

Currently, Fenway CDC has a board of 16 members who meet the third Wednesday of each month. Board members are required to participate in one or more of our nine committees and provide governance and strategic oversight for the work of the organization. They also ensure that our work aligns with the larger community through collaboration with neighbors and community stakeholders.

3. Executive Committee

Our Executive Committee, comprising the board officers and chairs our standing committees, meets the first Wednesday of each month. Its members evaluate and recommend key decisions to ensure that resources, programs, and services align with the mission of the organization to serve our constituents.

4. Finance Committee

Fenway CDC's Finance Committee meets on the first Wednesday of each month. Committee members analyze financial data, evaluate the organization's financial performance against an annual budget, review funding strategies, and monitor and improve financial policies. The committee reviews all major financial decisions and makes recommendations about them to the board.

5. Nomination Committee

The Nomination Committee identifies and interviews potential board members with a focus on developing new leadership within the organization and the community.

6. Fundraising Committee

Our Fundraising Committee contributes strategies and identifies resources to increase the funding capacity and promote the CITC program.

7. Housing Development Committee

An integral part of Fenway CDC, our Housing Development Committee meets the third week of each month. The committee's members provide guidance to the housing staff and help resolve project-related issues. When planning a new development, we assemble residents and community stakeholders who share their perspective to help us shape the project. In building refinance or rehabilitation projects, we involve residents from the initial planning phase. We also seek advice from community stakeholders and interested neighbors. Broader constituencies are engaged when the project is intended to serve special-needs populations.

8. Urban Village Committee

Fenway CDC's Urban Village Committee (UVC) meets resident leaders and community residents monthly. The meeting agenda and dates are publicized through email notices and Fenway

Newspaper. The UVC undertakes the community planning function of Fenway CDC and provides a platform where the community can monitor and respond to developments planned for the neighborhood. The committee assigns a single individual assigned to each major development project as "point person" working with other UVC members act as peer editors and collaborators. This allows us to respond to the Boston Planning Development Authority (BPDA) and developers with information received from residents. The UVC chair and staff liaison report to the board about the latest developments in our neighborhood, and activities of UVC members who monitor and write comment letters on development projects and participation in public planning meetings.

9. Resident Advisory Committee

Our Resident Advisory Committee is comprised of Fenway CDC tenants who provide feedback about property-management and issues affecting their living conditions and quality of life.

10. Fenway Family Coalition

Fenway CDC successfully facilitates the Fenway Family Coalition (FFC) which is a group of Fenway parents who organize family events and advocates about issues affecting families in the neighborhood. The FFC hosts annual community-oriented events such as the Safe Trick or Treating, Fenway Family Health programs, weekend children's programming, and activities that improve the health, economic, and social well-being of residents.

Tenant Organizing

Fenway CDC has a long history of supporting tenants to preserve "expiring use" units through community organizing. Our efforts contributed to the preservation of nearly 600 units of expiring use housing. We are the only neighborhood-based group in the Fenway working to preserve affordable housing for the long term and dedicated to promoting social and economic diversity. Our tenant organizing builds leadership among low-income residents to resolve landlord-tenant issues and improve their living conditions.

Over the past six years, we have undertaken tenant organizing at the Burbank Apartments working with a tenants' association, St. Botolph Terrace, Our Lady's Guild House at Charlesgate West in Boston, Clearway Street, and Emerson College students moving into the Fenway. Our counseling and training support helped hundreds of residents preserve affordable housing, promote tenants' rights, manage conflicts with landlords, and improve resident living conditions. We work with elected officials, other community organizations and CDCs, Greater Boston Legal Services, Massachusetts Alliance of HUD Tenants, and the Metropolitan Boston Housing Partnership to provide stabilizing services to Fenway residents.

Stakeholder Involvement in the Development of the Community Investment Plan

Fenway CDC's Community Investment Plan reflects input from our board, feedback from residents, and qualitative and quantitative data which we collect through regular community needs-assessment surveys and focus group sessions. In 2014, Fenway CDC and resident leaders updated the Fenway's Urban Village Plan (See Section 1 for more information) and presented to city officials, private developers and residents during 2015 and 2016. Over 100 community stakeholders shared their opinions and insights about neighborhood issues through a needs-assessment survey conducted in March 2013. When residents asked what they believed to be the most pressing neighborhood concerns, they most often identified affordable housing and institutional expansion. Please see Attachment F for the analysis and outcome of the focus group visioning sessions.

Section 3: Plan Goals

Housing Development and Preservation

To date, Fenway CDC has developed and preserved nearly 600 units of affordable housing, or 16% of the neighborhood's affordable housing supply. The majority of our housing units are affordable to families and individuals earning 60% or less than the area median income (AMI). We work closely with local institutions, local government, residents, and private developers to forge partnerships and seek out affordable housing opportunities. Our affordable housing contributed greatly to the neighborhood's racial and ethnic diversity with nearly 60% of our units occupied by residents who are minority and ethnically diverse.

Goal 1: Expand Housing Development and Preservation

Over the next three years, Fenway CDC will continue to develop and preserve mixed-income housing. We will also improve our current properties while exploring opportunities with institutions and private developers to develop new affordable housing units in the Fenway.

Goal 2: Expand Service Area

Fenway CDC board voted in 2013 to expand our development area beyond the Fenway to help us meet the challenge of high acquisition costs and competition for locally available property. Enlarging our footprint will allow us to seek out opportunities in other neighborhoods and communities. Our plan is to forge collaborations where our experience and skill can add value to the development of a property or enhance a partner's ability to develop. Our expanded service area includes Suffolk, Essex, Middlesex, Norfolk, and Worcester counties.

Benefits to the community include:

1) Preservation of an economically diverse community in the Fenway allows people of modest means to live in a safe community close to jobs, public transportation, and amenities.
2) Preservation and expansion of the Fenway CDC's real estate portfolio ensures that properties can remain affordable to people of modest means for long term.
3) Development of locally affordable housing allows people to remain in neighborhoods they grew up in but can no longer afford to live in.
4) Promote economic development through creation of job opportunities in real estate and related industries.

Community Planning and Organizing

Fenway CDC has been at the forefront of community-based planning since the late 1980s with notable success. We have a history of collaborating with community residents, area non-profits, issue-specific interest groups, local institutions, elected leaders, and others to build resident engagement and community leaders to build a more inclusive and sustainable future for the Fenway. As issues emerge from residents, we help connect different constituencies to organize campaigns that address the issues and challenges. Our activities are guided by a diverse and inclusive coalition that includes low and moderate-income residents, immigrants, and people with disabilities.

The Fenway neighborhood has seen a large increase in development since 2014. More than 6 million square feet of new development has been proposed or started in the Fenway neighborhood including the Longwood Medical Area. Large-scale development and institutional expansion are

driving our neighborhood to a tipping point with rising rental costs. There are about 21 development projects in progress in the Fenway.

Fenway CDC was actively involved with our community partners to suggest improvements in the City's Inclusionary Development Policy to make housing affordable citywide. We saw success in December 2015, when Mayor Walsh signed an Executive Order prompting changes in the City of Boston's Inclusionary Development Policy (IDP), leveraging the private development market to ensure the continued development of affordable housing in Boston. IDP applies to residential developments with ten or more units that will either be developed on property owned by the City of Boston, or that will require relief from the Boston Zoning Code. Under IDP, developers of these projects are required to build affordable units on-site; build or acquire affordable units in an off-site location, or, with BRA approval, provide a contribution to the Inclusionary Development Fund. The Executive Order signed by Mayor Walsh improves this policy to require additional units or funds, and affords a higher level of predictability and transparency in the development process.

The Fenway neighborhood falls into Zone A of the IDP requirements and developers seeking to build their units off-site will be required to increase the number of affordable units from 15 percent of the total to 18 percent of the total units in their development. This focus by the City of Boston highlights the continued need to develop and maintain affordable housing for Boston residents.

With each new development, the Fenway loses more of its affordability. The annual per capita income for Fenway residents is $23,312 with an average household income of $34,483. Of Fenway residents, 35.2% make less than $14,999/year with a poverty rate of 41.5% and an unemployment rate of 9.8%[3]. Over 40% of Fenway residents have spent half or more of their income on rent. Because of the large number of college and universities in the neighborhood, the Fenway housing market has become inflated. Very few of these educational institutions provide a sufficient amount of on-campus housing for their student population causing increasing pressures on the housing market and reducing housing available to non-students. Since 1990, we have lost nearly 5% of families in the Fenway.[4] If this trend continues, lower-income families will no longer have access to a neighborhood that contains critical resources like hospitals, educational and cultural institutions, transportation, jobs, and recreational space.

Fenway's Urban Village Committee is the focus for our planning and development monitoring work. The qualitative and quantitative neighborhood survey data, focus groups visioning sessions, and community partnerships will guide our future housing and community development work.

Goal 1: Building Community Leadership Capacity

Building community leadership capacity by engaging residents and emerging leaders and empowering them with the knowledge and tools to make positive change in their neighborhood has been a primary goal for Fenway CDC since its inception. We continue to focus on identifying and supporting community leaders who can help engage their neighbors in the Fenway and encourage more grassroots support for community development.

Goal 2: Updating the Fenway's Urban Village Plan

In 2014, we updated the Fenway's Urban Village Plan that was created by Fenway CDC in 1999. This resident-led plan, which focuses on the needs of the community, allows Fenway

[3] Source: U.S. Census Bureau, 2011-2015 5-Year American Community Survey

[4] Fenway CDC Data, 2012. This figure was derived from 2010 BRA data plus the 173 expiring-use units that were converted to market-rate in 2011.

CDC to provide guidance to developers in the Fenway that aligns with the resident vision of the Fenway neighborhood while allowing for economic growth and development. The updated Plan is available online at http://www.fenwaycdc.org/files/2015FenwayUrbanVillagePlan.pdf. We will continue to share the Plan with stakeholders and update it over the next three years.

Goal 3: Equitable Inclusionary Housing Initiative

Fenway CDC will continue to collaborate with elected-Leaders, other community organizations and CDCs to suggest improvements in the City's housing policy to ensure community participation and creation of future stock of mixed-income housing for low- and moderate-income residents. We saw success when the former Boston Redevelopment Authority (currently Boston Planning Development Agency) moved the Inclusionary Housing Development fund to Department of Neighborhood Development to ensure transparency, proper tracking, and auditing of those funds.

Goal 4: Tenant Organizing

Tenant Organizing is a large part of how Fenway CDC helps improve the quality of life for Boston residents. Our tenant organizing work aims to educate and create collective power by working together in groups, unions, associations, and coalitions.

Benefits to the community include:

1. Residents and stakeholders are empowered to contribute insights and perspectives about neighborhood issues.
2. Fenway CDC provides training, knowledge, and resources so residents can independently make positive changes to their neighborhood and improve their quality of life.
3. Develop a healthy, safe, cohesive and thriving neighborhood with economic opportunities for residents, businesses, and institutional partners.

Goal 5: Economic Development Support for Small Businesses

Fenway CDC plans to help small businesses promote economic development by providing networking opportunities and promotion. Fenway business owners can share information about their services to Fenway CDC residents and can access a great number of local customers through Fenway CDC's promotion of the businesses. Additionally, we will collaborate with Fenway businesses to find local talent within the neighborhood. This will allow residents to work close to home while providing employers with local, reliable employees.

Resident Services

Our "Walk to Work" and Resident Services workforce development program has enhanced the ability of Fenway residents to pursue goals, maintain stable housing, overcome barriers to success, achieve self-sufficiency, and improve overall quality of life. Through housing counseling and social services support, we empower residents to achieve self-sufficiency and maximize their full potential. The Fenway Family Coalition provides positive role models to youth and support to families and parents raising children and teens in the Fenway. We organize financial literacy, health, educational and cultural events, and activities to improve the wellbeing of residents. Many of these services are provided on site and with multi-lingual options that reflect the diversity of our residents.

Goal 1: Life Stabilization and Well-being

We continue to see participants attain the life conditions needed to enable them to take steps toward greater economic stability and well-being.

Goal 2: Education and Employment Skills/Job Readiness

Our education and employment program will assist residents in gaining job readiness skills and education needed for participants to secure and retain living wage employment.

Goal 3: Economic Stability

Participants will increase their job-readiness skills, which will enable them to participate successfully in the labor force.

Goal 4: Tenant Services

Participants will have access to social benefits and ongoing case-management and service referrals.

Benefits to the community include:

1. Promote economic development by helping residents to advance their education and secure jobs that increase their standard of living.
2. Help residents develop greater economic self-sufficiency and reduce their need for government assistance.
3. Reduce population of homeless individuals and families in Boston by educating residents about the barriers to maintaining adequate, affordable housing.

Section 4: Activities to be Undertaken

Housing Development and Preservation Activities

1. Pipeline Cultivation

   This is an ongoing effort. We are speaking and meeting with local institutions, other CDCs, for-profit developers, brokers and property owners regularly to seek out new development and joint-venture opportunities. This will permit us to target properties to purchase and work with the owners to agree on an appropriate purchase price. We are also mobilizing our Board, members, and neighbors for insights, connections, and political support in this work.

2. Community Cultivation

   To expand our potential pipeline outside the Fenway neighborhood, we have begun exploring possible areas where there is openness to the Fenway CDC and our experience, and have begun conversations with municipal and community leaders. This work will involve the board and staff. Wherever possible, we will focus on development in contiguous communities but will evaluate each new development opportunity individually and with input from residents, community stakeholders, and professional consultants (as needed).

3. Development Financial Modeling

   In conjunction with the housing pipeline cultivation, we will develop a range of financial models and housing scenarios that are appropriate for a variety of possible properties. This will be an ongoing process.

4. Community Organizing

Fenway CDC's Housing Department will work closely with other stakeholders such as abutters and residents of properties targeted for acquisition to build support for the project. Housing and civic engagement staff will engage these important community resources to ensure our projects are financially and socially successful.

5. Team Assembly

   We will work with a core group of architects, contractors, and development consultants to help us evaluate projects for acquisition and plan cost efficient building and energy designs for renovation and construction.

6. Funder Cultivation

   We will maintain on-going conversations with lenders and funders about the future of Fenway development opportunities as well as our efforts to start a development pipeline outside our traditional boundaries.

Community Planning and Organizing Activities

Activity 1: Building Community Leadership Capacity

1.1 Conduct leadership-training sessions for residents and organize community meetings.

1.2 Collaborate with institutions for service learning programs to involve students in our programs and activities to create positive community impact.

Activity 2: Building Fenway's Urban Village Plan

The Fenway's Urban Village Committee works with Fenway CDC's Community Planner to update the Urban Village Plan, a living document targeted to developers and elected officials who do business within the Fenway neighborhood. The plan reflects the current composition and state of the neighborhood, outlines the new developments and policies that have been built and adopted, respectively, since the last update in 2015. Fenway CDC's Community Planning Director manages the engagement of the committee comprising residents and community stakeholders who are involved in planning, organizing, leading, and controlling the following activities to achieve the community's common vision and goals.

2.1 Monitor institution and private developments and mitigate any negative impact on residential area to prevent rising housing costs, displacement of residents, and diminishing local services.

2.2 Form partnerships to create sufficient and varied housing supply that promotes diversity and equal opportunities in the Fenway.

2.3 Form partnerships with neighborhood institutions to provide community space and facilities for residents to improve their social and well-being.

2.4 Identify transportation options for residents and working population in the Fenway neighborhood and improve accessibility for people with physical disabilities.

Activity 3: Equitable Inclusionary Housing Initiative

3.1 Continue to strengthen relationships with nonprofit partners, private developers, elected officials and the Boston Planning Development Authority (BPDA).

3.2 Leverage partnerships to make concrete changes in the Inclusionary Development Policy.

3.3 Forge partnership with private developers that Fenway CDC could be owner or lessor of the Inclusionary Development Policy units that the developers provide onsite.

Activity 4: Tenant Organizing

4.1 Build leadership among the low-income residents and provide the foundation for social justice through training, counseling and support to help them preserve affordable housing, promote tenants' rights, manage conflict, and improve living conditions.

Resident Services Activities

Activity 1: Life Stabilization

1.1 Participants will access social benefits or services with assistance from our Resident Services staff to ensure residents are receiving all benefits for which they are eligible.

1.2 Residents will have access to fresh fruits and vegetables through the Fair Foods "$2 per bag" initiative. Providing access to fresh, affordable food to individuals, families, and seniors in need helps offset the cost of living in an urban neighborhood.

Activity 2: Education and Employment Skills/Job Readiness

2.1 Each participant will develop a professional résumé and cover letter, complete 20 hours of job search per week, and participate in 1 to 3 hours of employment counseling. Participants will get interview preparation, job readiness training, and placement services.

2.2 Fenway CDC will help individual entrepreneurs access training resources and referrals to achieve greater economic success through our collaborations with public and private community partners that provide resources or workshops in money management, taxes for small businesses, and accessing funding for entrepreneurs/small business owners.

Activity 3: Economic Stability

3.1 Participants will secure employment, increase the number of hours worked, and/or increase their hourly wages. Those who do not gain permanent employment will register with a temporary placement agency.

Activity 4: Tenant Services

4.1 Participants will make tangible progress towards completing the tenant education, financial literacy workshops, life skills workshops, and home-buying workshops to develop healthy habits, improve money management skills, and learn how to deal with life's adversities more effectively.

Section 5: How Success will be Measured and/or Evaluated

Fenway CDC maintains records of all of the work that we conduct both with residents and with non-residents and records related to property acquisition and management. Because much of our funding is secured through public and private grants, we are experienced at reporting data on a regular basis to demonstrate the ongoing nature and effectiveness of our work. We understand the importance of ensuring that our goals are specific, attainable, and measurable. Fenway CDC will provide results data as required for securing CITC funding.

Housing Development and Preservation

Our housing development and preservation work will be measured by the number of people housed, the number of housing units preserved or created, the quality of asset management, and the number of community, institutional and private development partnerships developed.

Community Planning and Organizing

Our community *planning* efforts will be measured by the number of positive community outcomes achieved, the number of resident leaders trained, and the number of successful community partnerships forged for project development.

Our community *organizing* efforts will be measured by the number of service-learning programs continued or created in partnership with local institutions, the number of resident leaders trained, the number of at-risk residents helped by tenant organizing work, and the advancement of our Inclusionary Housing Policy work (as noted in Section 3, Goal 3).

Resident Services

Life Stabilization work will be measured by the number of participants who are able to access one or more social benefits services (e.g., Food Stamps/WIC, Housing Vouchers, SSDI, Health Insurance/Medicaid, Fuel Assistance, Childcare Vouchers and Providers, etc.). We will also track the number of residents who utilize the "Fair Foods" program each month and ensure residents are aware of the availability of fresh fruits and vegetables at an extremely reduced cost.

Our work in education and employment skills/job readiness will be measured by the number of participants who develop professional résumés and cover letters, who complete 20 hours of job search per week, and who attend 1 to 3 hours of employment-related counseling sessions (e.g. interview preparation, how to apply for jobs, information about basic skills necessary for employment, placement assistance, etc.). Additionally, we will measure the number of small business owners/entrepreneurs who participate in or access workshops and educational programs provided by Fenway CDC and our partners.

Economic Stability work will be measured by the number of participants who secure employment, who increase the number of hours worked or increase their hourly wage, or who register with a temporary employment agency.

Our success with Tenant Services will be measured by the number of participants who make tangible progress towards completing the tenant education, financial literacy workshops, life skills workshops, and home-buying workshops to develop healthy habits, improve money management skills and learn how to deal with life's adversities more effectively.

Section 6: Collaborative Efforts to Support Implementation

Housing Development and Preservation

As noted in Section 1, Fenway CDC has developed and maintained positive relationships with the surrounding hospitals, colleges, and universities to develop programs that provide civic engagement and service-learning opportunities for students and employee-development programs for workers in those institutions. We plan to build on those relationships to develop workforce housing that is affordable to the employees at the lower end of the pay scale at these institutions. We also seek to acquire property that these organizations consider extraneous. These partnerships could result in affordable housing that serves the mission of Fenway CDC and the institutions themselves.

We plan to collaborate with for-profit developers as they build larger, modern residential towers in the Fenway community. We would like to work with them to provide more affordable units to maintain the neighborhood's desired level of 15% of housing at affordable levels (this also aligns with the executive order regarding affordable housing as discussed in Section 3). We will continue to work with community leaders (municipal officials, community advocates, real estate advisors, community residents, etc.) as we seek new opportunities beyond the Fenway borders. Fenway CDC

will build its name as a champion for affordable housing in communities in which the organization is currently unknown.

Community Planning and Organizing

Fenway CDC's community planning and organizing work will continue to involve residents and stakeholders such as institutional partners, neighborhood business owners, working professionals, non-profit partners, and elected officials. Residents and stakeholders will be involved through civic engagement and community meetings to plan and participate in making changes for the neighborhood. As part of the grassroots planning initiative, the Fenway's Urban Village Committees (Housing, Institutional Impact, Transportation Options and Access, and Community Space) comprised of residents and stakeholders will continue to update the Urban Village Plan through community meetings. Fenway CDC will impart knowledge and tools (framework, process, system, and policies) to empower our stakeholders to make positive neighborhood changes.

Resident Services

Fenway CDC has developed partnerships and collaborations with the following local non-profits and other Community Based Organizations: ABCD Parker Hill/Fenway Neighborhood Service Center, Career Link, Jewish Vocational Services, Children's Hospital, Brigham and Women's Hospital, YMCA International Learning Center, Career Collaborative, United South End Settlements, Northeastern Center of Community Service and The Work Place. These partnerships create a network of support throughout Boston. These partnerships also provide localized career and life-stabilization services to Fenway residents as well as helping residents secure the training and employment services necessary to secure employment in the Boston area and ensure long-term success in their fields.

Section 7: Integration of Activities/Consistency with Community Strategy and Vision

Community Vision

Fenway CDC adopted the Urban Village Plan in 1999 as its guideline for evaluating proposed development along Boylston Street. That same year, the Red Sox released a plan to construct a new 44,000-seat baseball stadium. Fenway CDC sponsored two public meetings to gather input for use in updating the plan vision. With those changes—primarily intended to encourage economically feasible development—the Urban Village Plan emerged as a compelling, alternative vision to the ballpark proposal. The revised plan was presented in August 2000 at a community charrette that was jointly sponsored by the Fenway CDC and the preservation group *Save Fenway Park!*

The plan has grown to become a central component of Fenway CDC's mission to promote neighborhood stability and inclusiveness. It won the support of City Hall, private developers, and nearby institutions. Fenway CDC has shaped its programs and projects to advance the Urban Village Plan, which also provides the criteria by which we evaluate development proposals throughout the Fenway and comment on them in the City's formal review process.

In 2008, Fenway CDC measured progress toward the goals spelled out in the Urban Village Plan by hiring an outside agency to provide a report card of our activities related to the development of the Fenway Urban Village. The full Urban Village Report Card is available on Fenway CDC's website, www.fenwaycdc.org or in print by calling for a copy. Through continued implementation of the plan, the Fenway CDC aims to transform the neighborhood into an urban village—a self-sustaining environment where people can live, work, shop, and entertain in a single urban area. In 2015,

Fenway CDC updated the Urban Village Plan by engaging residents and community stakeholders in our Neighborhood Needs Assessment and Visioning Focus Groups.

Community Strategy

Fenway CDC continues to build community leadership capacity by conducting community meetings and trainings for residents and stakeholders in the following five working areas:

1) Affordable Housing: Ensured sufficient and varied housing supply is available
2) Transport and Access: Increase public transportation and improved access for the disabled
3) Community Space, Open Green Space, and Arts & Culture Working Group: Improve community facilities and access, maintain open green space, and provide access to local cultural institution
4) Institutional Impact: Mitigate the risk of gentrification which may displace residents
5) Business Community: A healthy business community serving local residents and visitors, while providing employment opportunities

Interaction and Interrelation of Activities with Larger Community Vision and Strategy

Fenway CDC's Community Investment Plan activities are aligned with the Community Vision and Strategy through our partnership with residents and stakeholders, integration of processes and sharing of resources. We also ensure that our activities are aligned with the work of the Department of Housing and Community Development, the Massachusetts Association of Community Development Corporations, the Metropolitan Area Planning Council, and Health Resources In Action, an organization that aims to improve healthy lives and sustainable communities.

Our community planning and housing development program activities address affordable housing, mitigating impact of institutional expansion, development of neighborhood businesses, community safety, quality of life improvements, homeownership, gentrification, and protecting assets from predatory lending practices. These issues are critical in transforming our vulnerable Fenway neighborhood into a strong, viable community. Our workforce development program collaborates with social service and community organizations to improve job access and quality employment for low-income residents. Our Resident Services focus on maximizing income and increasing residents' future financial assets and the wealth of low-income families. We provide housing counseling, training on financial literacy, provide information on affordable consumer financial services, and assist residents in planning for future home ownership. We also provide services that help residents build, repair, and leverage credit as well helping locate affordable housing.

Our CIP is consistent with other neighborhood, community, and regional plans.

Fenway CDC's Community Investment Plan is designed to complement or build on the vision found in documents that the city has produced to shape the neighborhood's zoning and streetscape. These include the East Fenway Neighborhood Strategic Plan (2003), Land Use and Urban Design Guidelines for the West Fenway Special Study Areas (2002), and the Fenway Neighborhood Transportation Plan (2001).

Fenway CDC ensures that our CIP goals and outcomes are strategically aligned with the work of the Department of Housing and Community Development, the Massachusetts Association of Community Development Corporation, the Metropolitan Area Planning Council, and many other CDCs in the commonwealth of Massachusetts. Through continuous collaboration with stakeholders and residents, we believe we can leverage our community network, resources, and knowledge to help residents live longer lives and build a prosperous economy.

Section 8: Financing Strategy

Over the next three years, Fenway CDC will finance its activities with a multipronged approach as it has in the past. Between 2010 and 2014, Fenway CDC collected development fees during the refinance of several of its existing housing properties. With those fees, we were able to establish board-designated reserves to sustain us through the years when development fees are not projected. In our financial projections, Fenway CDC anticipates that it will be able to maintain a consistent level of asset management fees and collection of deferred development fees from our housing properties. We anticipate new development fees in 2018-2019 on an expiring-use affordable housing property that we are in the process of acquiring. Our projections also include staffing and expenses similar to our 2017 budget after having increased our housing and program staff capacity over the past two years, thanks, in large part, to increased unrestricted donations through our fundraising events. The CITC program has had a very positive impact on our event and donor fundraising. Please see Attachment G for more information about the financial projection of our community investment.

Strategy 1: Expand Real Estate Projects

A portion of our reserves has been set aside to allow us to support a real estate development team while we pursue new affordable housing development opportunities. In the past 18 months, we have identified several potential projects within the Fenway and are working with partners to move them forward. Real estate projects will be funded through the traditional channels of acquisition, pre-development, construction, and permanent financing. We will seek additional grant funds as appropriate for each project. Fenway CDC has experience in assembling financing for projects and relies on development consultants for additional expertise. Fenway CDC has a strong 44-year history of developing affordable housing, having created or preserved nearly 600 units in 11 projects with financing through city, state, federal, and private sources.

Strategy 2: Expand Funding Sources

We will focus our fundraising efforts on expanding existing sources of grassroots fundraising through our successful annual Fenway Ball that has been stable sources of unrestricted income for the last 10 years. We are also organizing smaller fundraisers such as Taste of The Fenway and Fen-tastic Fest. We will strengthen relationships with funding sources that may potentially benefit from tax credits offered through the CITC Program.

Strategy 3: Strengthen and Increase Existing Funding

We will use our existing program successes to appeal to existing corporate and foundation funders to continue to expand their grant funding. As in the past, we will work towards broadening our grant funder base by demonstrating that our programs are making a positive community impact and can serve as a model for other communities. Fenway CDC will have financial support for its resident services work from Boston Children's Hospital's Determination of Need funding through 2017 and Community Development Block Grant funding via the City of Boston Jobs & Community Services (CDBG-JCS) through June 2017. The Walk to Work Resident Services program has had a 10-year history of CDBG-JCS funding due to Fenway CDC's services provided to the community. We will pursue new Determination of Need funding sources and other grants to fund the program once the current Boston Children's Hospital multi-year funding ends. Our Community Planning and Organizing activities have been supported for the last decade through a combination of foundation grants ranging from $5,000 to $50,000 from People's United Bank, Santander Bank, the State Street Foundation, Community Economic Development Assistance Corporation (CEDAC), and the Hyams

Foundation. Fenway CDC's unrestricted income from fundraising events and housing fees have supplemented grant funding for Community Planning and Organizing.

Strategy 4: Improve Operational Efficiency

We will continue to expand our service-learning program with local colleges and university to utilize students who contribute their time and talents in our work. We will deepen our community engagement with donors and funders through traditional relationship development and social media. We will also utilize our donor database to capture, track and analyze fund development data and formulate strategies to increase funding from a variety of sources.

Section 9: History, Track Record, and Sustainable Development

Fenway CDC was founded in 1973 as a response to a string of threats to the neighborhood including a flawed urban renewal plan; an arson-for-profit ring that claimed five lives; pressures from institutional expansion; widespread condo conversions; and displacement; the elimination of rent control in a context of rapidly rising housing costs; and plans for the construction of a large baseball stadium in the residential area.

Fenway CDC mitigated the impact of those crises and found opportunities to strengthen the community while expanding programs and services to aid low-income and moderate-income families and individuals living in the neighborhood. Fenway CDC carries on this work today and continues to be a stabilizing presence in the community.

Track Record of Past Practices and Approaches to the Financing and Implementation of Proposed Activities

Housing Development and Preservation

Fenway CDC began developing and preserving affordable housing 44 years ago. Today, we build on our history of identifying properties, community needs, partners, and funding sources that have allowed us to improve the lives of residents and build community. Fenway CDC has financed its housing development and preservation activities over the years through funding from partnerships with public and private entities. Since our inception, we have accomplished the following in our housing development and preservation efforts:

- Developed and preserved nearly 600 mixed-income homes for a few thousand residents
- Created the first housing in the U.S. set aside for people with AIDS and HIV
- Long-term investment in the local community through Fenway CDC's continued ownership and community-focused management of the property

Community Organizing and Planning

Fenway CDC was founded by community activists who resolved community-planning issues. Community Organizing and Planning has always been central to Fenway CDC's mission and have remained a cornerstone of its activities. Since our inception, we have accomplished the following:

- Trained resident leaders to plan and implement community-oriented activities that improve their neighborhood and quality of life of residents.
- Involved residents to develop and promote a plan for the development of an "urban village" in the Fenway that includes development of 2,000-3,000 units of mixed-income housing and a community center.

- Led a campaign involving residents to prevent the demolition of Fenway Park and initiating a charrette where nationally known architects, planners, and engineers worked with the community to devise renovation plans. Many were later adopted by the Red Sox.
- Engaged residents and community stakeholders in a campaign to save Bus 55 from being eliminated by the MBTA in West Fenway for two consecutive years. This benefitted our residents, neighborhood employees and many visitors, who come from other neighborhoods to the Fenway to learn, work, or play.
- Engaged residents and community stakeholders to share their voices to ensure that Northeastern University increases their student dormitories beds from 0 to 600 in their 10-year master plan. This helps to prevent displacement of residents due to transient students in the neighborhood escalating rental costs.
- Collaborated with community stakeholders to promote the improvement of the Inclusionary Development Policy (IDP) to improve affordability in citywide neighborhoods and saw success when the Mayor authorized the transfer of $29M of IDP funds from the former Boston Redevelopment Authority to the Department of Neighborhood Development.
- Worked with Elected-Leaders, community partners, CDCs, and the Boston Committee to suggest improvements in the City's housing policy to create future stock of mixed-income
- housing and saw success when Mayor signed executive order to increase future stock of mixed-income housing and increased IDP funds to support affordable housing projects.

Economic Development

- Since 1994, Fenway CDC has partnered with the employers in the Longwood Medical and Academic Area to form the "Walk to Work" program. This program was established out of a need for free career counseling, job placement, education and training referrals, and career advancement services for Fenway residents with no other resources available to them. We have placed hundreds of low-income and moderate-income job seekers into a wide range of jobs in occupational and industrial sectors.

Resident Services

- Fenway CDC has served thousands of residents by providing housing-related services, counseling, referral services, and case-management relating to education, job, health and financial issues.

Senior Programs

- Fenway CDC formerly operated the award-winning Peterborough Senior Center, which provides over 100 sessions of health, educational, cultural, and recreational activities to improve the social and wellbeing of senior citizens. Fenway CDC continues to house, serve, and advocate for the needs of all of the Fenway's low and moderate-income residents, including seniors, and plans to work closely with the PSC and its members toward that mission.
- Served over 200 Fenway seniors in computer applications at our former computer-learning center and through private tutorials at the senior center.
- Prevented the displacement of nearly 200 seniors in the aftermath of rent decontrol.

Fenway Family Coalition

- In 1994, Fenway CDC launched the Fenway Family Coalition (FFC) in response to the isolation and lack of support that Fenway families experienced. FFC is a constituency-led initiative that

provides families and children with educational, health and cultural activities. The FFC works with over 20 local businesses annually to sponsor family-oriented community events such as the Safe Trick-or-Treat Halloween Party.

Personal Financial Management

- In 2012, Fenway CDC formed a partnership with American Consumer Credit Counseling to conduct financial literacy education workshops and provide educational resources for low-income residents. This program seeks to help the low-income residents acquire the knowledge needed to overcome barriers to moving out of poverty and to become economically self-sufficient. They learn financial management skills such as creating fiscal goals, developing budgets, savings, and debt management.
- Our Financial Education workshop trainers from 2014 to 2016 included People's United Bank, Sovereign Bank, and the Urban League of Massachusetts. Fenway CDC has also forged partnership with Webster Bank to bring home-buying information workshops to educate residents about the importance of building financial assets for their future.

Sustainable Development

Fenway CDC's work is consistent with the Commonwealth's Sustainable Development Principles in the following ways.

Concentrated Development and Mixed Uses

Fenway CDC's real estate development projects are located in a dense urban neighborhood of Boston. The projects all exceed the highest LEED standard of 10 units per acre. The Fenway is a lively, mixed-use, transit-oriented neighborhood. Residents can walk to banks, restaurants, grocery stores, daycares, community centers, libraries, pharmacies, schools, and health care providers.

Advance Equity

Our projects and committees are more diverse than the Fenway neighborhood as a whole, although slightly lower than the City of Boston. We continue to seek minority residents by advertising in non-English publications and those read by minorities and provide translations at meetings.

Make Efficient Decisions

Fenway CDC prides itself on the civic engagement of its members and residents of its buildings. Part of our mission is to empower people and to help them find their voices around issues that affect their lives. This means that we also involve residents and neighbors when we develop projects. As a result, our decision-making is not always the most expedient. Participation of those directly involved, such as building residents or abutters, does help make our projects go more smoothly. People who feel ownership in the actions taken are less likely to protest or stop development.

Protect Land and Ecosystems

To date, our projects have involved acquisition or building on already developed site in the Fenway neighborhood of Boston. We understand and value the importance of "green spaces" within a large city like Boston and the value of parks to residents and families as well as visitors, with one of our committees focused on the protection and expansion of green space in the community.

Provide Transportation Choice

Our projects are in a mixed-use, transit-oriented community with pedestrian and amenities access within a half mile. We fought to preserve MBTA bus access to the center of the neighborhood.

Increase Job and Business Opportunities

Our Fenway projects preserve housing near the Longwood Medical Area, a major employment source in Massachusetts. These projects will create jobs during the construction phase and preserves the employment of the property management staff who support the sites and residents. Our planning principles call for locally owned businesses and for those that provide services to residents.

Promote Clean Energy

All of our properties have recycling bins, and we use software to monitor the monthly energy use of all of our properties. We have installed energy efficient retrofits into all our properties, and solar thermal systems have been installed on three properties with plans for two more.

Plan Regionally

The *2008 MetroFuture Regional Plan* issued by the Metropolitan Area Planning Council (MAPC) provides guiding principles for Fenway CDC's work. Fenway meets the ideal for the future envisioned by MAPC: it is a dense development in an already developed neighborhood, well served by infrastructure. There are shops, basic services, public transportation, and recreation space. *MetroFuture* defines this as a "more sustainable form of development due to energy-efficient housing types and compact development patterns that are readily served by transit." *MetroFuture* promotes future housing equity, by suggesting that low-income households should "be able to find affordable, adequate conveniently-located housing… and they will be able to avoid displacement." With Fenway CDC's expansion into other communities, we expect to embrace the same principles as we develop affordable housing in a wider footprint.