

South Boston Neighborhood Development Corporation (SBNDC)

COMMUNITY INVESTMENT PLAN 2023-2025

November 17, 2022

Introduction

The South Boston Community Investment Plan (CIP) 2023 continues SBNDC's 39-year mission to increase the supply of affordable housing in the neighborhood. The plan also expands on other mission goals to address neighborhood challenges such as economic development and asset-building/quality-of-life improvements, including resident health and the livability of the South Boston neighborhood.

Since 1983, SBNDC has developed more than 300 units of affordable housing and revitalized vacant and blighted properties in South Boston. SBNDC currently manages 171 rental units. Most of SBNDC's housing development work was completed before 2002, and the organization struggled in subsequent years to secure new sites for affordable housing production. By the late 1990s, real estate prices began to rapidly increase in South Boston, and that trend has continued unabated. Local political opposition to affordable housing, combined with high prices, made it extremely challenging to develop or preserve affordable housing in our dense urban neighborhood and exacerbated the housing crisis here. However, SBNDC successfully bid on publicly owned sites and completed Patriot Homes for Veterans in 2016. Political support shifted in favor of affordable housing. SBNDC received community and city approval to develop two new developments, 206 West Broadway and O'Connor Way Senior Housing. These developments were successful, in part, because CITC leveraged important financial contributions that supported staffing during pre-development and construction.

Extensive market-rate real estate development in South Boston continues to change the neighborhood in complex and lasting ways. New development has resulted in a growing income disparity between wealthier newcomers and low-income, long-term residents, contributing to the displacement of low- and moderate-income residents. As a result, the lowest-income residents are increasingly isolated in the three public housing developments and SBNDC's housing in South Boston, and moderate-income and working-class residents have been forced to move out of the neighborhood as rents have increased. Since 2010, the median rent in South Boston has increased by 77% from \$2,232 to \$3,950.

Affordable housing development and preservation will continue to be the organization's main goal. New potential projects include McDevitt Senior Homes and Parcel D-4. In 2022, SBNDC secured an option to purchase McDevitt Hall, the former St. Augustine's convent, at a below-market price. This new development will convert the 1925 convent building into 35 affordable units for very low-income seniors. SBNDC has partnered with Trinity Financial to submit a proposal to Massport for the development of Parcel D-4. If selected as developer, the team will create approximately 100 units of affordable housing and 80 units of market-rate housing in an 18-story building in the South Boston Waterfront. SBNDC, in partnership with other Boston Community Development Corporations, advocated for more affordable housing in this area. Massport responded with the RFP for Parcel D-4, and we are hopeful that our team will be selected to develop the site.

Other priority programming areas will continue to include economic development that is focused on supporting small businesses and asset-building initiatives such as financial literacy training, community gardening, and tree planting, as well as climate action education and energy efficiency improvements. The Community Investment Tax Credit is a unique and valuable tool to leverage the resources required to address community needs.

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

The Plan Area

South Boston is a peninsula surrounded by Boston Harbor and bordered by the South End and Dorchester to the west. The neighborhood is well served by public transit, including buses and the MBTA's Red Line and Silver Line. It is also located near Interstates 90 and 93 and Logan Airport. SBNDP's service area is defined as the Fourth Suffolk State Representative district (see Fig. 1: Map of SBNDP Service Area). This catchment area is primarily comprised of Census Tracts 601-612 and ZIP codes 02127, 02210, and a portion of 02125. Most of SBNDP's work has been focused on the residential neighborhood of South Boston, but the total service area includes Fort Point and the South Boston Waterfront, as well as eastern portions of Dorchester.

SBNDP's constituency is low- to moderate-income households with incomes of below 80% AMI.

Mission

SBNDP's mission includes the following:

- Creation, preservation, and management of safe and decent affordable housing for low- and moderate-income residents of South Boston;
- Housing counseling to persons seeking affordable housing in South Boston;
- Partnerships with South Boston human services providers to coordinate the provision of affordable housing and services for special-needs populations, including but not limited to: veterans, the elderly, single-parent households, the homeless, and handicapped;
- Provision of greater economic, education, and housing opportunities in South Boston;
- Public improvements and investments in South Boston;
- Fostering an environment free of prejudice and discrimination in South Boston so that all residents may attain peaceful and safe enjoyment of their homes and neighborhoods;
- Partnerships with South Boston businesses and financial institutions to facilitate the creation of affordable housing and job opportunities for South Boston residents.

Section 2: Involvement of Community Residents and Stakeholders

1. Development of the Community Investment Plan

Resident and stakeholder involvement in the development of SBNDP's original CIP was primarily achieved by leveraging the strong community network of nonprofit organizations whose executives and staff members serve as representatives of their respective stakeholder groups. This approach was most appropriate at the time of our original CIP because it allowed us to incorporate a more diverse range of perspectives than we would have been able to access directly with our small staff, limited resources, and relatively small resident group. Since the original CIP was written, SBNDP has involved community residents in the following ways:

1. SBNDP Board and membership: The SBNDP board is comprised of 12 seats for local residents and stakeholders, including a 30% reservation of board seats for low-income tenants of SBNDP and representatives of nonprofits serving low-income residents. We currently have 3 vacancies on the board and are working to fill the openings with people of color and women. The current board members, through their professional expertise and personal experiences, represent the following constituencies: low- and moderate-income households, people in recovery from addiction, single parents, immigrants, the homeless, English language learners, students, veterans, the elderly, and youth. Board members meet monthly and play an active role in the community, serving on other boards and attending community meetings. For example, members of the board

serve on City of Boston community advisory groups that are established to review large-scale real estate developments and to make changes to the Zoning Code. (See Appendix for a current list of board members and their affiliations.) In this way, residents and stakeholders have been engaged in the development of the CIP through monthly SBNDC board meetings.

2. South Boston Association of NonProfits (SBANP): SBNDC is an active member of the South Boston Association of NonProfits. SBANP has a membership of approximately 50 South Boston nonprofit organizations, including social service agencies, the community health center, substance abuse treatment programs, adult education, churches, and youth programs.

SBANP advocates for the community nonprofits and their constituents and provides networking and peer support opportunities for members. SBANP monthly meetings provide an opportunity for staff of all the nonprofit organizations to collaborate on a regular basis and to be familiar with each other's programs. SBNDC's Executive Director and two board members are active members of the SBANP.

2023 CIP Update

The SBNDC CIP has not been significantly changed since the last update in 2020. Our primary focus areas are: affordable housing preservation and development, economic development through small business support, and asset building focused on financial literacy, nutrition, and climate action. While the COVID-19 pandemic slowed some of our planned initiatives, such as our climate action education work and the completion of the O'Connor Way Senior Housing, the basic goals and objectives of the 2020 CIP have not changed. And we have made significant progress since the original CIP: SBNDC's rental portfolio has grown from 47 units to 171 units, which greatly expanded the number of tenants with whom we have direct contact and, as a result, the diversity of backgrounds and experiences represented among our tenants.

During the pandemic, SBNDC dramatically increased its social media presence and outreach through email, Facebook, and Instagram. This outreach has enabled us to increase our advocacy for affordable housing. An indicator of the impact of our community engagement work is the highly successful campaign we organized around a development proposal in South Boston in early 2022. The developers of the Mary Ellen McCormack Redevelopment project said they would provide 100% replacement of the existing 1,016 deeply affordable homes for current Mary Ellen McCormack residents while adding almost 2,000 luxury residential units. But there were no plans for units for middle-income families. Our online petition gathered 144 signatures in a matter of weeks and spurred residents to attend online BPDA meetings to express their desire for more affordable housing in the neighborhood. The signers were a mix of our tenants, our regular supporters, as well as many new supporters.

In 2018, SBANP identified the effects of climate change on South Boston as a stated focus area. During the COVID-19 pandemic, that outreach and education work was curtailed. However, SBNDC completed the installation of solar panels on all its eligible buildings. SBNDC will hire a Climate Action Intern in 2023 to coordinate climate action projects across SBANP member organizations and other community groups, and to strengthen SBNDC's capacity to respond to the impacts of climate change.

II. Implementation And Monitoring

Residents and stakeholders have been and will be involved in the implementation and monitoring of the SBNDC Community Investment Plan in the manner described below. Additional details regarding our implementation, evaluation, and monitoring processes are outlined in Section 5.

1. SBNDC Board and membership: The SBNDC board and membership will continue to monitor implementation of the CIP through monthly board meetings and the SBNDC Annual Membership Meeting,

which is typically attended by 35-40 members. We rely on South Boston residents to hold us accountable to our mission, and to help ensure we are responding to the issues most important to community stakeholders.

2. South Boston Association of NonProfits (SBANP): SBANP provides a platform for SBNDC to reach a broad range of residents and develop collaborative partnerships with other organizations. *As stated above, our staff and board members continue to play a governance role in the SBANP.* SBNDC is the lead agency coordinating the climate action work that SBANP voted to pursue. SBANP members will continue to guide the implementation of this work, in particular through ongoing planning and participation in related projects and exercises. Many SBANP members also serve client populations for whom housing affordability is a pressing issue. Maintaining close relationships with these organizations and soliciting their input will improve the efficacy of our advocacy work and implementation of our plans to expand the number of South Boston residents utilizing our housing services.

3. Community At Large: In addition to SBNDC membership and our key partnerships through SBANP, we will continue to seek opportunities to invite input about our work from community members who would not otherwise engage with our programs.

Through a robust social media presence, we have addressed the challenge of educating the community about everything we do. In the past, residents who didn't directly benefit from our affordable housing projects perceived our work to not be relevant to their lives. But through social media and our newsletters, residents are now aware that we run the Farmers Market and the South Boston Chamber of Commerce, do climate work and beautify the business district by maintaining West Broadway tree pits and planting flowers, manage community gardens, and more. People are now realizing that we are here to improve the overall quality of life in the neighborhood. Everyone can now see that our work relates to them or their family in some way.

Building this foundational understanding of SBNDC's role in the community was a necessary step toward shaping a meaningful role for the community at large in the implementation and monitoring of our CIP. In addition to continuing the community engagement strategies described above, we will leverage social media and our newsletter mailing lists to engage constituents and collect feedback about our programs, and maintain up-to-date information on our website about SBNDC and the progress of initiatives outlined in the CIP.

Community Meetings: All of the physical development activities in the CIP have involved and will continue to involve public meetings and comment periods. SBNDC coordinates community meetings that are open to the public as part of all property purchases and development activities. During the planning and development of affordable housing projects, SBNDC regularly meets with abutters, elected officials, and neighborhood associations.

Section 3: Plan Goals

I. Increase the supply of affordable housing for low- and moderate-income residents and families in South Boston.

- Benefit for low- and moderate-income households: Low- and moderate-income households will benefit from increased affordable housing because they will be less rent-burdened and will not face displacement from their homes.
- Benefit for the entire community: The neighborhood will benefit from the redevelopment and occupation of blighted sites. An increase in the supply of affordable housing will help maintain the neighborhood's economic diversity and prevent the income disparity from increasing.

II. Focus on economic development through small business assistance.

- Benefit for low- and moderate-income households: Small business assistance helps to increase employment opportunities in the neighborhood and protects and promotes a diverse local economy for South Boston.
- Benefit for the entire community: The entire community benefits when its members are employed and able to care for themselves and their families. An economically healthier business district will improve the quality of life for all residents.

III. Asset Building: Improve the quality of life for residents of South Boston by addressing environmental and behavioral issues by creating green space, providing greater access to fresh produce and nutrition information, and increasing awareness and action around preparing for and mitigating the effects of climate change on South Boston.

- Benefit for low- and moderate-income households: Increasing the urban tree canopy, green spaces, and vegetable gardens will impact health issues such as asthma and obesity that disproportionately affect low- and moderate-income people. Our gardening programs and South Boston Farmers Market provide healthy food and nutrition information for low- and moderate-income people and employ local youth.
- Benefit for the entire community: Providing more green space, access to fresh produce, and nutrition education in urban neighborhoods has many environmental, social, health, and economic benefits that improve the quality of life for all residents.

Section 4: Activities to be Undertaken

I. Affordable Housing Activities

1. Pre-Development Work:

Activity: Many activities must be completed before development, such as planning, research, and identification of potential sites, funding analysis, and community organizing and outreach.

SBNDNC's latest affordable housing project is McDevitt Senior Homes, 35 units of affordable senior housing. SBNDNC entered into a purchase agreement with the Paraclete Foundation for the former St. Augustine's convent. The Paraclete, which stopped its educational operations in the building during COVID-19, will use the proceeds from the sale to fund scholarships for local youth. McDevitt Senior Homes presents a unique opportunity for SBNDNC to adapt a beloved community building and provide much needed affordable housing, with supportive services, for senior residents. This type of project is particularly important as an increasing share of South Boston's low-income residents are seniors, ages 65 and above. This project is in the pre-development stage. SBNDNC has submitted funding applications to state and city agencies and is in the process of seeking zoning approval from the City of Boston

Expected Impact: The identification of potential sites, planning, and funding analysis have been crucial activities in the process of initiating purchases and new construction of affordable housing. Additional affordable housing will reduce the financial burden and potential of displacement for low- and moderate-income households. Community organizing work has improved relationships with neighborhood residents and facilitated the development of affordable housing.

2. Rental Preservation and Development:

Activity: SBNDNC will continue its strategy to identify and acquire private and public parcels suitable for development, as well as occupied rental properties in the community. It will continue planning for new construction on properties it currently owns.

Expected Impact: Affordable housing development and preservation will prevent displacement of low- and moderate-income households by increasing affordable housing opportunities in South Boston.

3. Housing Counseling:

Activity: SBNDC will seek to increase the level of housing counseling it provides. In addition to the as-needed counseling we offer to walk-in clients in our office, we have utilized a database to digitize records and facilitate communication with clients on our waiting list, current tenants, and the broader community about housing opportunities and resources. We are also leveraging partnerships with local banking institutions to provide financial literacy education.

Expected Impact: Providing housing counseling combats displacement by educating tenants of their rights and advising clients on affordable housing opportunities. These activities also support our asset-building mission and provide a formal way for SBNDC to document information about demand for affordable housing in South Boston.

II. Economic Development Activities

1. Small Business Assistance:

Activity: Our ongoing support of small businesses through the fiscal management of the South Boston Chamber of Commerce has been more important than ever in the face of the COVID-19 pandemic. SBNDC has expanded its staffing of the Chamber of Commerce, assisting in member outreach and event planning for the South Boston Street Fest, Christmas Shopping Stroll, and Spring Shopping Stroll. Through a grant from Tufts Medical Center, SBNDC was able to hire a Small Business Growth Manager to help our small businesses certify with the city and offer networking opportunities. Our social media and newsletters present grant opportunities, workshops, and other resources to our small businesses.

Expected Impact: This assistance supports small businesses in South Boston, which is improving the economic vitality of the neighborhood and increasing job opportunities. By providing these services, SBNDC has and will continue to strengthen its relationship with small businesses.

III. Asset Building/Quality-of-Life Activities

1. Tree Maintenance and Community Outreach:

Activity: SBNDC will continue to expand the environmental education and tree planting programming of Southie Trees, as well as the care of at-risk heritage trees in the community. SBNDC continues to advocate for city tree plantings and care for tree beds, through planting, watering, and mulching, particularly along Broadway. SBNDC works with local youth in partnership with the South Boston Community Health Center to monitor tree health and conduct community outreach. In the summer of 2022, middle and high school students worked with SBNDC to design outreach materials and organize a Southie Trees pop-up at the Farmers Market to educate the community about the importance of street trees, especially in relation to the urban heat island effect.

Expected Impact: Increasing the number of trees in urban neighborhoods creates many benefits, including a decrease in respiratory illness through pollution filtering, quieter streets due to leaves and branches muffling sound, cooler summers as a result of shade and transpiration, and an aesthetically appealing neighborhood environment that can increase social capital and reduce crime. Community outreach around the importance of street trees helps ensure trees are cared for and well protected. All of these impacts contribute toward making South Boston a healthier, more livable neighborhood.

2. Community Gardens:

Activity: In the original CIP, SBNDC planned to continue to support the expansion of the programming of South Boston Grows. This program closed in 2015, and SBNDC has staffed two community gardens to continue this mission to increase the availability of fresh produce to low-income households. SBNDC recently received a grant from Lowe's Hometowns to transform a vacant lot in the neighborhood into a

public pocket park and community garden. Where feasible, we will also expand vegetable gardening opportunities at all SBNDC rental properties.

Expected Impact: The gardens managed by SBNDC provide fresh, local, organic, healthy food to low-income residents of South Boston. The gardens provide a vehicle for the education and community engagement of youth, who learn job readiness skills, gardening, and nutrition information.

3. South Boston Farmers Market:

Activity: In 2015, SBNDC took over the management of the South Boston Farmers Market from the South Boston Community Health Center, its founder. In order to keep the market functioning and continue its mission to provide healthy fruits and vegetables to low-income residents, SBNDC raised funds through CITC-generated donations and other grants to hire a market manager to staff the market. The manager also provides nutrition information at the market, coordinates special events and entertainment, and secures sponsor partnerships to provide health information.

Expected Impact: Without the Farmers Market, low-income residents would have few opportunities to obtain locally grown produce. Through the Farmers Market, we are improving nutritional opportunities in the neighborhood.

4. Climate Action Initiatives:

Activity: SBNDC will hire a climate action intern to work with community groups, teens, and other residents to provide climate action education. South Boston's geographic location, limited green and open space, and relatively low tree canopy coverage make the neighborhood especially vulnerable to stormwater flooding due to more frequent and severe weather events and health impacts of urban heat islands, among other challenges. SBNDC employs local teens to water street trees and plant flowers around them in the West Broadway business district. Our new community garden will be full of pollinator-friendly plantings. We have installed rooftop solar panels and energy-efficient windows on our affordable rental buildings to reduce energy use and lower costs to tenants as we make progress toward sustainability. SBNDC continues raising awareness of climate issues and helping community members build their capacity to mitigate and respond to the ways climate change impacts and will continue to impact South Boston. The Climate Action Partners initiative serves as a platform for residents, community-based organizations, business owners, and other stakeholders to work together toward these goals, and we will continue to leverage our deep collaborative partnerships to deploy projects that respond to topics identified by community members as most urgent and relevant.

Expected Impact: We expect increased understanding about the neighborhood-level effects of climate change in South Boston and increased resilience among low- and moderate-income households to prepare for and respond to related impacts. Engaging a range of stakeholders will build competency about these issues community-wide, reducing the neighborhood's collective environmental footprint, and increasing residents' ability to respond to increasingly severe and frequent extreme weather events as well as other types of emergencies.

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

I. Evaluation Process

Staffing challenges – and then the COVID-19 pandemic – disrupted the outreach and research strategies outlined in the original CIP. However, several new strategies are currently being implemented to support SBNDC's commitment to evaluating the success and efficacy of our programs, policies, and initiatives against our stated goals.

Evaluation Process: Ongoing monitoring and reviewing of key performance indicators (KPIs) will be at the

core of our evaluation processes, allowing us to measure progress against benchmark metrics. We will solicit input from SBNDP staff, board members, and residents and incorporate feedback from community stakeholders as well as industry-standard best practices to define the KPIs most relevant and useful to SBNDP. To encourage buy-in among stakeholders and ease implementation, we are working to integrate these practices into our existing operations as much as possible and to ensure the evaluation process adds value and introduces efficiencies for our staff and residents.

The primary tools we will use to implement evaluation processes are a client relationship management system we implemented, periodic check-in meetings with relevant internal and external stakeholders, and a strategic expansion of our community engagement initiatives. Engagement tools leveraged for this purpose will include informal outreach with individuals and groups, such as attending civic association meetings, as well as more formal channels, including questionnaires and focus groups. For most programs, we expect that quarterly reporting and review will be sufficient. For the Farmers Market we will review select KPIs and qualitative feedback more frequently, given the seasonal nature of the program.

Participants and Roles: SBNDP staff and board members play a crucial role in developing and implementing our evaluation processes of all activities. The community at large, SBNDP residents, business owners, as well as people who work and spend time in South Boston also participate in our evaluation of housing activities primarily through their engagement with our public processes around specific projects and affordable housing advocacy efforts. Applicants and housing seekers whose primary interaction with SBNDP is through the intake, lottery, and application processes also have an indirect role in evaluation as they often provide useful feedback on the ease of use and accessibility of these processes.

Evaluating our economic development work involves participation of the South Boston Chamber of Commerce and business owners providing feedback on Chamber activities and opportunities to increase relevancy and efficacy through formal channels (surveys) and informal outreach.

A wide range of stakeholders participates in the evaluation of our asset-building programs. Local youth hired to perform gardening and green space maintenance contribute to SBNDP's monitoring of these programs, and their efforts frequently solicit feedback from residents across the Lower End neighborhood where this work is focused. South Boston Farmers Market staff, vendors, shoppers, and organizations that perform community outreach at the market are valuable sources of feedback. Our Climate Action Partners initiative has engaged a variety of stakeholders, especially program staff and other nonprofit leadership and neighborhood residents, in the design and implementation of projects. Input from our implementation partners and program participants will also be collected to refine our activities as well as help determine focus areas for future efforts around climate action.

Measuring Success: Quantitative and qualitative data will be used to measure success for all of our activities. Examples of data to be collected and analyzed are outlined below:

Activities	Success metrics
<i>Goal: Increase supply of affordable housing</i>	
Pre-Development work	<p>Quantitative: Public comments and letters submitted supporting SBNDP advocacy and projects*, attendance and involvement with pre-development public meetings and planning activities, mailing list opt-in*, communications analytics*</p> <p>Qualitative: Expressed support for SBNDP's work and affordable housing in general in South Boston</p>

Rental Preservation and Development	<p>Quantitative: Number of affordable and market-rate units developed and preserved by SBNDNC*</p> <p>Qualitative: Increased awareness throughout service area of SBNDNC's efforts and successes, increased trust, and improved credibility for SBNDNC as a community partner and advocate</p>
Housing counseling	<p>Quantitative: Reduced time spent completing intakes and retrieving stored information*, volume of intakes completed*, applications received*, increased number of South Boston residents notified about and applying for affordable housing opportunities</p> <p>Qualitative: Greater understanding among community members about how to access affordable housing; improved visibility into the supply and demand of affordable housing in South Boston</p>
Goal: Focus on economic development through small business assistance	
Support small businesses in South Boston	<p>Quantitative: Number of events held*, event attendance*, number of new and active Chamber members*, number of SBNDNC commercial tenants*, number of jobs created/preserved by SBNDNC activities*</p> <p>Qualitative: Increased involvement among business community and willingness to take ownership of Chamber operations; increased awareness of SBNDNC's economic development activities, increased solicitation of SBNDNC/South Boston Chamber of Commerce involvement in economic development and business community issues and projects</p>
Goal: Asset building through quality-of-life improvements	
Address environmental issues with tree maintenance, community gardens, and green spaces	<p>Quantitative: Number of gardens maintained*, types and quantities of produce harvested*, trees maintained and preserved*, area of neighborhood where gardening/green space activities are deployed*</p> <p>Qualitative: Build gardening and environmental skills among local youth and families, improve the quality of green and open spaces through beautification efforts, connect understanding of environmental issues to health and climate change</p>
Provide vulnerable populations with access to fresh produce and nutritional information	<p>Quantitative: Attendance*, HIP/SNAP utilization data*, event days held*, participation rates for community engagement activities</p> <p>Qualitative: Vendor, shopper, and staff feedback</p>
Raise awareness and action around effects of climate change in South Boston with Climate Action Partners initiative	<p>Quantitative: Community members engaged (volume and statistics), event attendance, poll/survey responses, mailing list opt-in, communications analytics*, projects completed</p> <p>Qualitative: Quality and frequency of topical discussions with community stakeholders, unsolicited interest for partnerships and collaborations, depth of knowledge community members display regarding effects of climate change</p>

Section 6: Collaborative Efforts to Support Implementation

I. Affordable Housing Collaborations

Gavin Foundation: SBNDP currently leases a residential building to Gavin Foundation, a substance abuse treatment center located in South Boston, for use as supportive housing for their adult male clients.

South Boston Neighborhood House: The Neighborhood House provides Resident Services to SBNDP senior housing buildings.

II. Economic Development Collaborations

The South Boston Chamber of Commerce: SBNDP is the fiscal agent for the South Boston Chamber of Commerce, which represents small businesses, primarily those located in the Broadway retail business district of the neighborhood. SBNDP has increased its staffing support to the Chamber, assisting in outreach and community special events, such as the South Boston Street Fest, Christmas Shopping Stroll, and Spring Shopping Stroll.

III. Asset Building/Quality-of-Life Collaborations

Community Gardens: The gardens are maintained by our garden manager, local teens, and volunteers during the growing season. The teen gardeners are paid through the MLK Scholars program through an additional partnership with the South Boston Community Health Center.

Homeownership and Financial Literacy: SBNDP will continue to collaborate with local banking institutions, such as City of Boston Credit Union, Cambridge Savings Bank, and Harbor One Bank, and other community-based organizations, such as South Boston en Accion, to deliver financial literacy services.

Climate Action Initiatives: The success of our efforts to raise awareness and action around the impacts of climate change in South Boston were largely the result of productive collaborations we were able to develop with South Boston community centers, South Boston Community Health Center, South Boston Neighborhood House, South Boston Catholic Academy, Greenovate Boston, Massachusetts Clean Energy Center. We will maintain these collaborations and pursue additional partnerships with additional members of the SBANP and other relevant neighborhood associations as specific projects and objectives are identified.

IV. Other Collaborations

South Boston Association of NonProfits (SBANP): SBANP is the key to almost all of SBNDP's collaborations in South Boston. Collaboration among South Boston's extensive network of nonprofit organizations has been ongoing for several years through the SBANP. SBNDP will continue to report to and receive feedback from the members of SBANP to implement the CIP.

Fourth Presbyterian Church: The pastor of Fourth Church serves as the clerk of the SBNDP board. The church is extensively involved in social justice issues, including advocacy for affordable housing and youth employment, and is a strong advocate of SBNDP programs and projects. ***Fourth Church has played an important role in organizing support for several of the initiatives outlined in the Community Investment Plan, such as the affordable housing developments, 206 West and O'Connor Way.***

City of Boston: SBNDNC has a 30-year history of working closely with city departments, such as the City Council, Department of Neighborhood Development, Boston Housing Authority and Boston Planning and Development Agency, to secure funding and to acquire and develop city-owned land for affordable housing and community development projects. SBNDNC received funding commitments and land from the city for the 206 West and O'Connor Way developments described above. The City of Boston has also approved zoning variances for these projects. SBNDNC will continue to work with the city to implement the CIP.

Commonwealth of Massachusetts and other agencies: SBNDNC received substantial funding from the state for the Patriot Homes project, including LIHTC, HIF, and AHTF. The project also received Brownfields and Tax Exempt Bond financing from MassDevelopment. The O'Connor Way project was approved for LIHTC and received funds from MassDevelopment. The 206 West Broadway project received funding for environmental testing from MassDevelopment.

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

The activities in the CIP address the organization's stated goals and community-wide issues in South Boston, such as the increasing displacement of low- and moderate-income households and income disparity. The affordable housing activities address the income disparity in South Boston by reducing displacement of low- and moderate-income households. The economic development activities provide employment opportunities for those low- and moderate-income residents. The quality-of-life activities address asset building for low- and moderate-income households through wealth-building and financial literacy, providing counseling to the housing insecure, and improving health outcomes by preserving green space and targeting health issues, such as asthma and obesity, which disproportionately affect low- and moderate-income populations and can have negative impacts on children's educational achievement and lifetime earning potential.¹

There are dozens of government and other plans for the South Boston community. South Boston has been at the center of extensive real estate development in the city for the last 20 years. SBNDNC has ensured that its CIP aligns with the community visions indicated by other major plans for the area, some of which are explained below:

- **Housing a Changing City: Boston 2030:** This report is the city's comprehensive plan for housing development. It outlines several initiatives, including funding priorities and plans for Boston's seniors and middle class. SBNDNC supports the middle-class housing initiative by providing apartments that are accessible to the middle class below 80% AMI. The O'Connor Way project addresses the city's senior housing initiative and the fact that seniors are the fastest-growing demographic in Boston.
- **Plan Dot Ave/Dorchester Avenue Planning Initiative (BPDA):** SBNDNC staff and board were extensively involved in this planning process to transform the area between Andrew Square and Broadway Station from industrial uses to a new residential and commercial neighborhood. SBNDNC, in partnership with other nonprofits, successfully advocated for the inclusion of low-income housing into the plan for this area.

¹ DATA SOURCE: Boston Behavioral Risk Factor Survey, 2010, Boston Behavioral Risk Factor Surveillance System (BBRFSS), Boston Public Health Commission. DATA ANALYSIS: Boston Public Health Commission Research and Evaluation Office

- **Climate Ready: South Boston:** This program proposes initiatives to “ensure South Boston is prepared for climate change impacts,” including infrastructure improvements and adaptations as well as assisting private facilities, businesses, and other community members to access emergency preparedness resources and training. There are several city-led infrastructure projects in the works. Our Climate Action and community engagement work focuses on awareness and preparedness efforts.
- **Zero Waste Boston,** released in June 2019, outlines the city’s plan for drastically cutting the amount of trash ending up in landfills by 2030. A core recommendation of the plan involves improving the recycling rate and compliance across the city, targeting an 80% recycling rate (the current citywide recycling rate is about 25%). Our climate action work involves educational programs about recycling and reducing waste for community groups and SBNDP residents.

----- Section 8: Financing Strategy

SBNDP has utilized CITC funds to support all of the activities in the Community Investment Plan. CITC fundraising provided critical pre-development funds to support the affordable housing goals of the organization as we completed Patriot Homes and successfully received City of Boston approval for the development and financing of 206 West and O’Connor Way.

SBNDP has extensive experience leveraging multiple private, state, federal, and city sources to develop affordable housing, as demonstrated by the development of over 200 units of housing. Housing development projects at 206 West Broadway and O’Connor Way involved the use of public land for affordable housing development, and both received commitments from the City of Boston for Inclusionary Development Policy (IDP) funding totaling more than \$7 million. The O’Connor Way Senior Housing development was approved by the state for LIHTC funding. These projects also included private financing from Dedham Savings and Rockland Trust. 206 West was completed in 2018, and O’Connor way was completed in 2020.

CITC funds contribute to staffing expenses used to assist the South Boston Chamber of Commerce and for the Southie Trees program and the South Boston Farmers Market. In the past, these programs received additional foundation grant funding from the South Boston Community Development Foundation and the state Department of Conservation and Recreation.

SBNDP will finance the implementation of the CIP activities as follows:

I. Affordable Housing Activities

1. Pre-Development Work: SBNDP will use its reserves and new funds leveraged by CITC fundraising to fund pre-development, as it has done in past and current projects. For the new McDevitt Senior Homes project, we are seeking pre-development and acquisition financing from CEDAC. Once projects close and begin construction, these expenses are reimbursed from the project budget, and the funds can be used for the next project. In the past, SBNDP partnered with organizations such as Caritas Communities and with private developers to leverage resources to conduct planning, research, financial analysis, and design development. Over the past several years, SBNDP has increased its internal capacity to manage small real estate development projects, but will partner with other developers for large projects, like parcel D-4. We have also participated in the Federal Home Loan Bank Affordable Housing Design (FHLB) competition to take advantage of the talented student labor pool in Boston. Through the FHLB competition, we developed preliminary design and financing plans for the development of Patriot Homes, 206 West Broadway, O’Connor

Way Senior Housing, and our current project, McDevitt Senior Homes.

2. Rental Preservation and Development: SBNDNC is experienced in the methods of financing affordable housing development. Past projects have utilized city, state, and federal sources to develop affordable housing. To implement the CIP, SBNDNC anticipates using its reserves and funds raised through the Community Investment Tax Credit to acquire occupied rental housing and/or vacant land for future projects. Projects we have recently completed include:

- O'Connor Way Senior Housing: Completed in 2020, this project includes 46 affordable one-bedroom units for seniors. SBNDNC and Caritas Communities received designation in September 2015 from the Boston Housing Authority for the site adjacent to the Mary Ellen McCormack public housing development. The project was made possible in part due to funding support from two Waterfront projects: Pier 4 and 150 Seaport Boulevard.
- Patriot Homes: Construction was completed in November 2016. This development includes 24 affordable rental units for veterans. SBNDNC and its partner, Caritas Communities, received designation from the City of Boston to redevelop a former city-owned police station. The city also committed Inclusionary Development, Neighborhood Housing Trust, and Leading the Way funding. Support from the state included 4% Low Income Housing Tax Credits, HSF and AHTF.
- 206 West: SBNDNC and Caritas Communities completed 16 studios and 1-bedroom units of workforce housing, affordable to households below 80% AMI. The project includes 2 homeless set-aside units and ground-floor commercial space for a cafe. The project was financed with City and private bank financing.

We are currently working on:

- McDevitt Senior Homes: This project, which is in the pre-construction phase, includes 35 units of affordable senior housing. SBNDNC has officially filed plans pending approval from state and city agencies. SBNDNC entered a purchase agreement with the Paraclete Foundation for the property located at the former St. Augustine's convent.

II. Economic Development Activities

Small Business Assistance: As the fiscal manager of the South Boston Chamber of Commerce, SBNDNC has expanded its support of our small businesses, mainly through networking and promotional events. Through a grant from Tufts Medical Center, we hired a Small Business Growth Manager to help our women- and minority-owned businesses become certified with the city. As we move forward, we see this role expanding to include micro-loans, increased business-to-business networking opportunities, and more resources, support, and promotion. These efforts will be funded by increased fundraising and grant writing. Since the end of COVID-19 restrictions, SBNDNC has seen a major increase in sponsorships and donations for its business promotion events. We have also increased our CITC utilization.

III. Asset building/Quality-of-Life Activities

- **Southie Trees and Community Gardens:** These programs are supported by fundraising and grants. We recently received grants from the Babson Foundation and from Lowe's Hometowns to convert a vacant lot into a pocket park and community garden.
- **South Boston Farmers Market:** The market is currently supported by donations received through CITC fundraising.
- **Climate Action and Community Engagement Initiatives:** Utilizing CITC funds allowed SBNDNC to

hire an additional full-time staff member to advance our climate action and community engagement work. We plan to use CITC funds to support hiring climate interns each year and we are continually researching grant funding to support continued and expanded work in this area. We currently use a free online tool to organize, strategize, and track our community engagement. If we find a better tool with an annual fee, we will consider using CITC funding for that.

Section 9: History, Track Record, and Sustainable Development

I. History and Track Record of Past Practices

Throughout its 39-year history, SBNDNC has been dedicated to developing affordable housing for a broad range of residents, including the elderly, veterans, families, first-time homebuyers, and renters. SBNDNC has a long track record of partnerships and collaborations with both nonprofit and for-profit partners to achieve the 300 affordable housing units that have been created since its founding, and will continue that approach in order to achieve the goals of the Community Investment Plan. SBNDNC has and will continue to meet development standards that include: extensive community input into planning and design, construction standards sensitive to the environment and energy conservation, and improving the lives of low- and moderate-income residents, as demonstrated by the following projects:

- **O'Connor Way:** This project was completed in 2020 and includes 46 affordable senior apartments. The building is LEED Silver Certifiable.
- **206 West:** This project was completed in May 2019 and includes the construction of 16 affordable apartments and a cafe space, funded with Inclusionary Development Program funds and a mortgage from Dedham Savings. The building is LEED Silver Certifiable.
- **Patriot Homes:** SBNDNC completed a 24-unit apartment complex serving low-income veterans. This development was state-funded with HSF, AHTF and other sources and has achieved LEED Silver certifiability. The building is LEED Silver Certifiable
- **Taylor's Market:** SBNDNC renovated a vacant historic site into seven affordable apartments and two commercial spaces. SBNDNC received assistance from the state-funded Housing Stabilization Fund and a loan from the Massachusetts Historical Commission to complete this development in the summer of 1997.
- **Father Martin Co-op:** SBNDNC developed 34 units of family limited equity co-op housing that the organization assembled from both city- and privately owned vacant parcels. This development was funded using Low Income Housing Tax Credits and other sources.
- **Castle Cove Senior Center:** This elderly apartment co-op was completed in partnership with Co-op Services in 1997 on the historic site of the Boston Beer Company. The development was funded by HUD Section 202.

II. Consistency with the Commonwealth's Sustainable Development Principles

The CIP involves activities that incorporate stewardship of the natural and built environments, and is consistent with the Commonwealth's Sustainable Development Principles, as follows:

Concentrate Development and Mix Uses: Because South Boston is a dense neighborhood undergoing rapid development, SBNDNC's affordable housing construction involves **concentrated development** and requires efficiency and maximum utilization of space and existing infrastructure. All new developments must be LEED Silver certifiable, and new projects must be all-electric and utilize Passive House building techniques where possible. SBNDNC's work supporting Southie Trees and community gardens promotes green spaces and **mixed uses** that are pedestrian-friendly.

Advance equity: SBNDNC's mission of affordable housing and economic development will reduce income disparity and prevent displacement of low- and moderate-income residents in all the activities outlined in the CIP.

Make Efficient Decisions: SBNDNC participates in city planning initiatives to ensure that development will address the needs of low-income residents in perpetuity through deed restrictions.

Protect land and Ecosystems: Through SBNDNC's work with Southie Trees and community gardens, the organization has **protected land and ecosystems** by increasing green space and strengthening natural resources in South Boston. This has created more opportunities for education regarding the environment, food, and nutrition, as well as recreation and community building.

Use Natural Resources Wisely: The CIP includes real estate development activities that are LEED Silver certifiable. This process promotes the **preservation of natural resources** through practices such as using recycled construction materials. In addition, the construction of LEED-certified buildings **promotes clean energy** through increased energy efficiency and the reduction of greenhouse gas emissions.

Expand Housing Opportunities: Affordable housing development is the core mission of SBNDNC. The organization will **expand affordable housing opportunities** in South Boston that will meet the needs of low- and moderate-income households. Providing more affordable housing options will help preserve the economic diversity of the neighborhood.

Provide Transportation Choice: SBNDNC is aware of its role in initiating development in a dense urban neighborhood with extensive public transportation access and considerable potential for transit-oriented development. 206 West Broadway was designed as a transit-oriented building without off-street parking to encourage residents to utilize alternative modes of transportation. SBNDNC staff has also been active in the community processes related to the Seaport Strategic Transit Plan to ensure the needs of all South Boston residents are addressed. South Boston's proximity to various transportation nodes and infrastructure, including Logan airport, many miles of bike lanes, several bus lines, the MBTA Red Line and the Silver Line, and Interstates 90 and 93, **provides its residents with a range of transportation options.**

Increase Job and Business Opportunities: The small business support outlined in the CIP will **increase job and business opportunities** by strengthening small businesses who are local employers.

Promote Clean Energy: SBNDNC developments and its Southie Trees program reduce greenhouse gasses and consumption of fossil fuels by employing innovative building technologies and planting trees. Improving the energy efficiency of older buildings in our portfolio and educational efforts to improve recycling rates and reduce energy waste also supports this principle. We have added solar panels and energy efficient windows to most of our properties and will continue to look for ways to improve energy efficiency in all of our buildings. All new buildings will be all electric with solar panels and will utilize passive House building techniques.

Plan Regionally: As evidenced in Section 7 above, SBNDNC has ensured that the CIP aligns with and **supports established local, regional, and state plans.** SBNDNC determines its activities by their potential for community-wide benefits, with a focus on benefits to low- and moderate-income residents.

Section IV: Exhibits

Board of Directors

Robert Monahan, President

- Retired, Director of Operations for Julie’s Family Learning Program
- Served as the Co-President of the South Boston Association of NonProfits
- Lives in South Boston

Amanda Alberda, Treasurer

- Assistant project manager for Trinity Financial
- Lives in South Boston

Burns Stanfield, Clerk

- Pastor of Fourth Presbyterian Church
- President of the Greater Boston Interfaith Organization

Robert Keough

- Attorney with Krokidis and Bluestein, LLP
- Former South Boston resident

Eileen MacNeil

- Executive director of the Huntington Avenue YMCA

Karen O’Brien

- Retired Intake Specialist for the Gavin Foundation Cushing House for Girls
- Lives in a South Boston NDC apartment

Robert Rubinstein

- Emergency shelter director for Boston Rescue Mission
- Lives in a South Boston NDC apartment

Antonio Saez

- Board member for the South Boston Neighborhood House
- Lives in South Boston

Charlotte Tuminelli

- Senior training manager at Evidence for Policy Design at Harvard Kennedy School
- Lives in South Boston

Fig. 1: Map of SBNDN Service Area

