

# WATCH CDC Community Investment Plan 2023-2026

## Section 1: Community or Constituency (ies) to be served by the organization

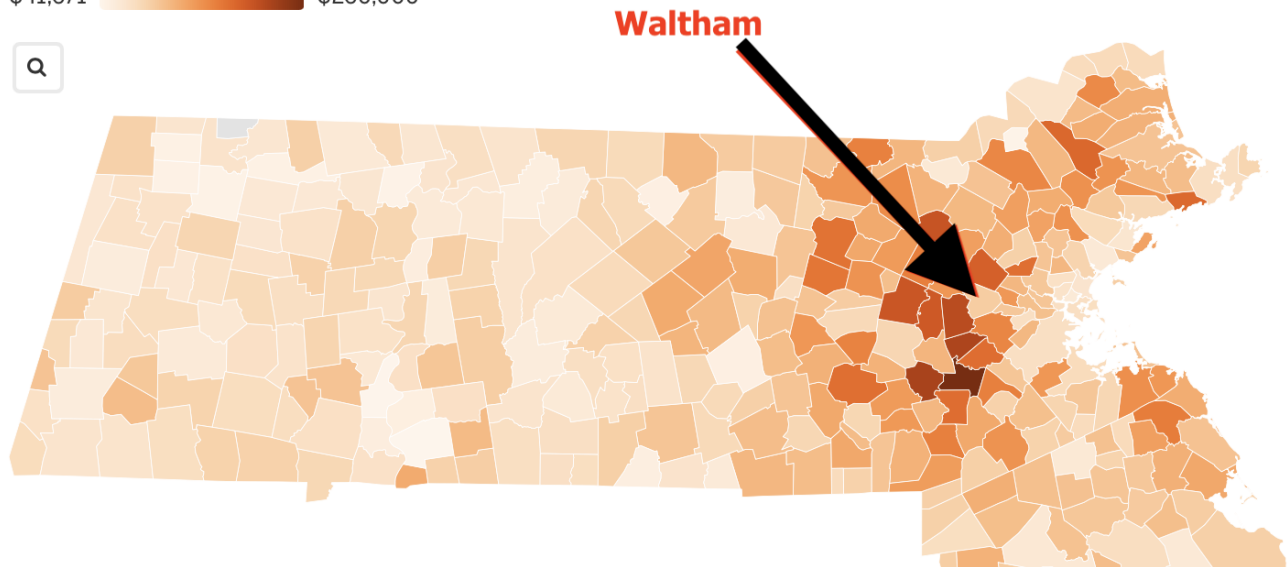
WATCH serves the low-income population of Waltham, Massachusetts. Waltham is located in Middlesex County, along the Rt 95 beltway, west of Boston. Waltham's 2021 population was 64,015.

Waltham is the “poor neighbor” of the Metro West area: a town surrounded by wealthier neighborhoods. Low-income residents of Waltham face the combined obstacles of low wages for the service industry, unusually high rents associated with the Boston Metro area, and access to fewer services and resources than Boston residents. This population is the constituency that WATCH serves.

## 2020 Massachusetts median household income by town

See how median household income differs by town in Massachusetts, according to recently released Census data.

\$41,571  \$250,000



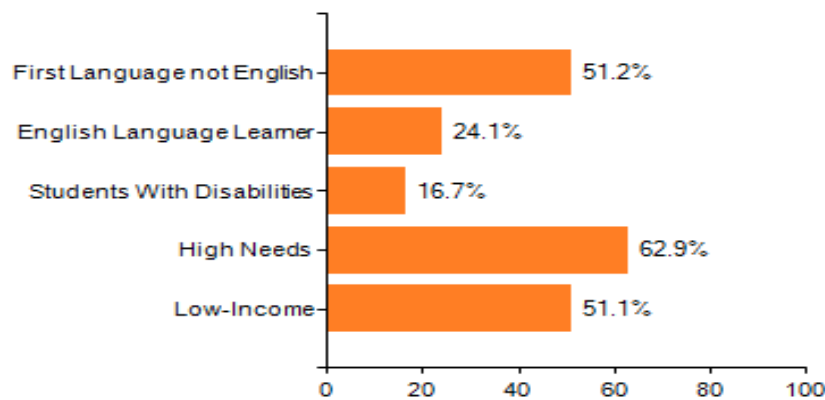
Source: [US Census Bureau, 2020 ACS 5-year Estimates](#)

Waltham is a city with a high rental to home ownership rate and a high housing cost burden for many residents. 50% of Waltham's housing units are rental units. 40% of Waltham tenants face housing burdens, paying more than 30% of their incomes for rent. (US Census, 2020)

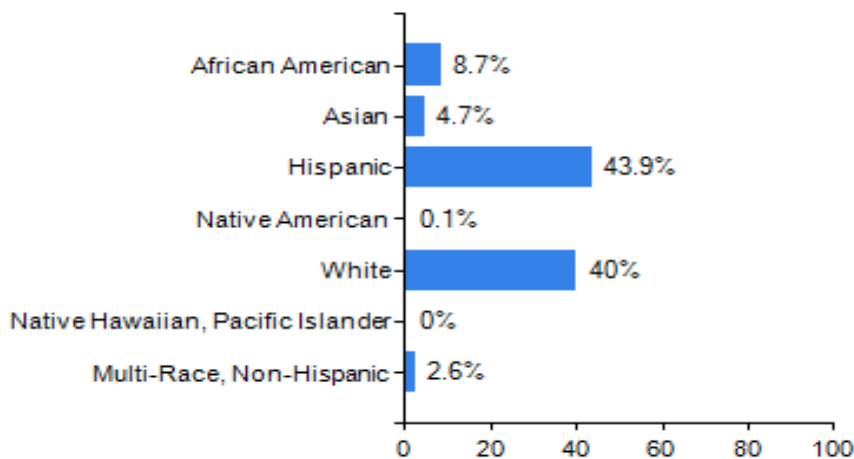
According to the US Census, Waltham has a higher percentage of foreign-born populations (26.6%) than the surrounding cities and the state. Waltham has large populations of Guatemalan, Ugandan, Haitian, and Asian residents. New immigrants face the additional obstacle of learning a new language. According to the US Census, the five largest ethnic groups in Waltham are White 64.5%, Asian 11.8%, Hispanic 11.2%, and Black or African American 7.03%.

Because some Waltham residents are undercounted in the US Census, the most accurate demographics are reflected in the data from the DESE school profile, which show a much higher rate of Hispanic and foreign-born residents.

## Selected Populations



## Student Race and Ethnicity



Source: Department of Education, Massachusetts, <https://profiles.doe.mass.edu>

Hispanics are the ethnic group with the largest identified number of residents living in poverty in Waltham, with Black and Asian being the next largest groups. Low-income residents in Waltham work primarily in the service industry as office and hotel cleaners, grocery and retail store clerks, landscapers, construction workers, and restaurant and fast-food staff.

WATCH's office is located on the South Side of Waltham, where there is a high concentration of low-income tenant households. Our office is within walking distance of many of our constituents.

### Section 2: Involvement of community residents and stakeholders

#### *Description*

Residents of Waltham and stakeholders serve on WATCH's Board of Directors and Advisory Board. WATCH relies on more than 120 volunteers in our programs and to carry out organizational activities. Historically WATCH has held two large gatherings of residents and stakeholders: an annual meeting in the spring and an Immigrant Appreciation event in the fall. After a hiatus due to COVID, this summer WATCH sponsored a Party in the Park for residents and stakeholders.

Through regular interactions with students, clients, donors, and community partners, WATCH receives daily feedback about the needs of low-income and immigrant Waltham residents and our effectiveness in responding. In the ESL Program, WATCH offers immigrants not just language courses and tutoring, but a place to gather, feel welcomed and safe, and ask questions and get answers. WATCH also highlights the experiences of our clients by providing space for them to share their stories and experiences at organizational events and in publications, providing leadership opportunities such as speaking engagements at local churches, and encouraging participation at public forums.

### *Evidence*

Nine of our thirteen current board members are WATCH clients or Adult Education students.

At our Housing Clinic and Job Clinic, our approach is to first listen and then to work with the client to identify their priorities and develop an action plan. Through this listening process we look for patterns in the needs of the community so that we can best adapt our programs and services to meet those needs. At our bi-weekly client care meetings, and at full staff meetings, we discuss emerging unmet needs and make plans to expand our resource guide, referrals, and services to address these needs.

Clients of the Housing and Job and Financial Management Clinic, and ESL students, are encouraged to join the Tenant Action Group (TAG), where they can better understand their rights as tenants, learn how housing policy is made, see how decisions in Waltham affect their housing circumstances, and engage in advocating for municipal affordable housing policy decisions that will impact them.

### *Engagement of residents and stakeholders in development of CIP.*

- **Staff and Board of Director racial equity discussions**, held monthly throughout 2022: led to the development of DEI (Diversity, Equity, Inclusion) goals and activities.
- **Board of Directors meeting**, June 22: discussion of Diversity, Equity, and Inclusion goals. 8 members present.
- **Community Needs Survey**, July 18: mailed to 1,700 clients, students, members of WATCH, teachers, tutors, volunteers, interns, agency partners, members of Board of Directors and Advisory Board, donors, and public officials. Survey invited feedback on programs, actions, and goals for the next three years. Respondents rated current programs, offered suggestions for improvement and expansion, identified unmet community needs, and offered suggestions on how WATCH might meet those needs. The survey also asked how respondents would like to be more involved in WATCH or receive more support from WATCH.
- **Board of Directors meeting**, July 27: discussion of unmet community needs, outreach goals, and program expansion goals. 9 members present.
- **Community Needs Survey**, August 16: sent by e-news to 3,818 contacts.
- **Party in the Park**, August 18: posted questions on a large board: What are we doing well? What can we do better? What ideas do you have for new programs? Participants posted comments and suggestions. 350 attended; 13 comments received.
- **Waltham Interagency Network meeting**, September 7: shared link for Community Needs Survey. 12 participants.
- **Staff interviews with consultant**, September 23-30: asked about individual program mission, how to fulfill the mission, resources needed, and concerns about the scope of work and vision for the next few years. 9 staff interviews.
- **Board of Directors meeting**, September 28: reviewed survey results and staff interviews. Discussed what WATCH is doing well, what we can improve, and goals for the next three years. 12 participants.
- **Community Needs Survey**, September 30: emailed to Waltham Interagency Network, 190 staff of local non-profit agencies that work with low-income residents.

- **Waltham Interagency Network Meeting**, October 5: gave feedback on WATCH's community programs. What is going well and what we can improve during the next three years? 17 participants.
- **Advisory Board meeting**, October 6: reviewed SWOT, environmental scan, state of organization docs, and survey responses. Discussed general direction of WATCH and specific areas for improvement. 19 participants.
- **Staff Strategic Planning session**, October 1: reviewed SWOT, State of Organization, key partnerships, Waltham demographics, mission, values statement, and survey responses. Participated in a series of exercises to clarify and prioritize goals for the next three years. 13 participants.
- **Executive Director** collected input from all Advisory Board meetings, Board of Director meetings, staff input sessions and interviews, and the community survey to develop a SWOT and draft an action plan.
- **Staff Strategic Planning session**, October 24: reviewed draft CIP and gave feedback; discussed goals. 12 participants.
- **Board of Directors meeting**, October 26: reviewed draft CIP and offered further input and feedback. 8 participants.

#### *Current and projected roles of residents and stakeholders in implementing CIP activities*

WATCH benefits from the volunteer services of a large number of residents and stakeholders, more than 120 this past year. A Volunteer and Internship Program, staffed by a full-time Volunteer Coordinator, identifies and trains residents and stakeholders to assist in implementing the activities of the CIP. The role of volunteers in the Housing Clinic is to collect and deliver household items for families in need, assist clients with completing applications for rent and utilities, and help with mailings to send resource information to clients. Future roles will be to implement small group trainings to increase tenants' self-reliance—trainings on accessing online resources, and doing a housing search, for example—and to make follow-up calls to clients who have received services or assistance from the clinic. Volunteer roles in implementing the Tenant Assistance Fund are serving on the TAF assessment committee and purchasing items for Back to Work grants. The ESL Program is in large part carried out by a corps of volunteer teachers and teacher aids and tutors. Volunteers also assist with preparation of curriculum and teaching materials. A volunteer markets the monthly first time home buyer courses. The new Job Clinic will engage volunteers to teach computer skills courses and to make follow-up calls to clients who have attended workshops or received one-on-one assistance.

Implementing the activities for community organizing and voter registration calls on volunteers to help with mailings, participate in door-to-door canvassing, table at 7 – 8 festivals or events annually, and make telephone calls for turn-out at public hearings. Other roles include providing public testimony about policy issues and writing letters to City Councillors.

Of course, another vital role is played by residents and stakeholders is investing in WATCH to enable implementation of the CIP activities.

#### *Current and projected roles of residents and stakeholders in monitoring CIP activities.*

The mechanisms for monitoring CIP activities include interactions with students and clients; data reports on Housing Clinic activity and benchmarks, Job and Financial Management Clinic activity and benchmarks, and ESL Program registrations, classes, and progress; quarterly staff progress reports

prepared for the Board of Directors; workshop surveys and annual surveys of clients and students; and annual reviews of CIP progress by staff and Board of Directors. Future mechanisms for monitoring will also include data on outcomes for the Housing Clinic, the Job and Financial Management Clinic, and ESL classes.

The roles of residents and stakeholders in monitoring the CIP activities are to supply feedback in interactions as clients and students, in workshop surveys, and in annual surveys. Residents and stakeholders also serve in the roles of members of the Board of Directors and the Advisory Board, where they monitor and assess activities monthly for the former and quarterly for the later. Residents and stakeholders also monitor CIP activities on WATCH's website and social media, in WATCH's annual newsletter, and at annual WATCH community events. Projected monitoring roles will continue these avenues for engagement.

### **Section 3: Plan goals**

Underlying WATCH's goals for the next three years is an organizational commitment to these approaches: systematize our approach to case management in order to effectively help as many clients as possible; maximize partnership opportunities with other agencies; track and measure outcomes on well-defined scopes of work; implement and systematize a Customer Relationship Management (CRM) system throughout the organization; and implement components of our Racial Equity Pledge. Another goal is to return to in-person services for most of our programs in 2023.

### **Community Investment Plan Goals**

#### **1. Increased housing stability and reduced risk of homelessness for low-income Waltham households.**

The WATCH Housing and Basic Needs Clinic will provide free one-on-one housing and basic needs counseling. Three bilingual (Spanish speaking) case managers will assist tenants in filling out applications or share information on how to apply for rental and utility assistance; provide eviction prevention services; and make referrals for basic needs such as food, childcare, mental healthcare, immigration, and legal assistance. WATCH will supplement staff services with volunteer help.

Low-and moderate-income households will benefit by receiving assistance with housing and basic needs, and referrals for other community services. Assistance includes help in avoiding eviction, learning how to perform a housing search, resolving issues with landlords, getting assistance with fuel and utility bills, receiving furniture, obtaining food stamps, benefiting from legal help, and getting assistance from other agencies.

The whole community will benefit by a reduction in risk of homelessness and at-risk tenancies, higher likelihood that services will be accessed and utilized, increased confidence by low-income households in navigating key community resources, and an increase in positive outcomes for clients.

#### **2. Distribution of a minimum of \$50,000 per year to low-income residents in grants for basic needs.**

WATCH's Tenant Assistance Fund will provide at least \$45,000 in direct assistance through direct grants to aid with rent, utilities, and emergency housing needs. Through our Back to Work fund, WATCH will distribute \$5,000 annually in individual grants to remove barriers to work. Grant requests will be reviewed and allocated weekly based on criteria approved by the Board of Directors.

Low-and moderate-income households will benefit by receiving direct assistance when they are not able to get help from other state and local governments. This assistance will prevent evictions and utility shut offs, provide food, remove barriers to work, and prevent families from experiencing homelessness when they are in a housing crisis.

The whole community will benefit by reduced housing and food insecurity in the community, as well as increasing the number of workers available for entry into mid-level positions.

### **3. Increased proficiency in English and integration into the community for adult immigrants.**

WATCH's free English Language Program will be staffed by a manager, part-time assistant, and volunteer teachers, aides, and tutors. The program will include three levels of instruction in English classes, one-on-one tutoring, a GED preparation course, a citizenship course, and conversation groups.

As a result of our student-centered, interactive, and inclusive approach to teaching, low- and moderate-income immigrant households will benefit by feeling safe and accepted at WATCH. Students' increased proficiency in English will support them in achieving new jobs, raises, and promotions. US citizenship status will increase community engagement and access to the benefits of citizenship. The ability to communicate in English will lead to easier access to housing options, more participation in community activities, better interactions with children's teachers, easier paths to learner's permits and driver's licenses, and more confidence in opening bank accounts. Students will be connected to other programs and resources at WATCH and feel a sense of community. ESL curricula focused on students' daily lives will guide students to other WATCH programs and other community services.

The whole community will benefit from the integration of thriving and active immigrants into community life with expanded economic opportunities and increased confidence in civic engagement.

### **4. Increased financial stability for immigrants and low- to moderate-income residents.**

WATCH's Job and Financial Management Clinic will offer free one-on-one assistance in resume preparation, interviewing, and job search. The clinic will also offer one-on-one financial management coaching virtually and in-person. Weekly workshops will be offered on job and financial management topics relevant to low-income Waltham residents. The clinic will be staffed by a full-time bilingual (Spanish-speaking) coordinator.

Low-and moderate-income immigrant households will benefit from increased confidence and support in their job search and financial management. The clinic will reduce barriers to low-income residents and immigrants in stabilizing and improving their financial circumstances.

The whole community benefits from reducing clients' dependency on government and agency programs by improving employment access and increasing self-sufficiency of program participants.

### **5. Education and preparation of first time home buyers in the region.**

WATCH's First Time Home Buyer program will be staffed by a part-time coordinator and a part-time facilitator. WATCH will partner with local banks to sponsor pre-purchase courses for first time home buyers. The course will be certified by CHAPA (Massachusetts Citizens' Housing and Planning Association). Courses will be offered nine to ten times per year, to educate and prepare first time home buyers for successful home buying experiences.

Low-and moderate-income households that participate in the program will benefit by receiving a broad understanding of the process and responsibilities involved in purchasing and owning a home, reducing misunderstandings and foreclosures. Graduates of the course will qualify for first time buyer

assistance programs. Those who are successful in buying a home will begin to build wealth and equity and escape the trap of paying exorbitant rents with no long-term benefit.

The whole community will benefit by creating an avenue for first time home buyers to achieve the American Dream of owning a home. Increased homeownership by a diverse population creates a more stable community, in which homeowners are invested in the community in a deeper way.

#### **6. Expanded access to safe and affordable housing units in Waltham through community organizing. Waltham tenants engaged in legislative advocacy, outreach, and voter registration.**

WATCH's Community Organizing Program, staffed by a community organizer and a campaign coordinator, will develop local affordable housing proposals and campaigns. The Tenant Action Group (TAG), made up of Waltham tenants, will influence municipal policy and funding allocation decisions through advocacy efforts: canvassing door-to-door, outreach at community events, public testimony, and other community organizing actions. TAG members and WATCH interns and volunteers will canvass the local neighborhood and businesses and table at community events to inform residents about community issues and register voters.

Low-and moderate-income immigrant households will benefit by having greater access to secure housing in Waltham: fewer people will be forced out of Waltham because of the cost of housing, and fewer residents will be forced into substandard or crowded conditions. Tenants involved in the organizing efforts will be more educated about civic processes. Low-and moderate-income immigrant households will benefit by registering to vote, or checking on their voter registration status, and being more informed and personally involved in local elections.

The whole community will benefit from greater equity within the community. The City of Waltham will maintain its economically and ethnically diverse population. Pressures of gentrification will be mitigated by efforts of city leaders to create and sustain more affordable housing. The whole community will benefit as underrepresented residents are engaged in affecting positive change for the city. Members of the public will benefit from information about candidates' positions prior to elections.

#### **Section 4: Activities to be undertaken**

Note: Currently most services are carried out virtually, with some in-person classes. After working remotely for two and a half years, WATCH plans to re-open its office space to in-person classes, clinics, workshops, and one-on-one assistance. Currently the office HVAC system is being upgraded, with an expected completion date of February 2023.

#### **Activities to be Undertaken**

##### **1. Increased housing stability and reduced risk of homelessness for low-income Waltham households.**

- Offer free one-on-one assistance by phone, text, email, and in-person to help at least 600 Waltham households avoid eviction, find new housing, resolve issues with landlords, get assistance with fuel and utility bills, obtain food stamps, benefit from legal help, apply for free phone and internet services, and get assistance from other agencies.
- Follow-up with clients by making follow-up calls, sending client surveys, recording outcomes, and taking further actions as necessary.

- Build upon the existing Customer Relationship Managing (CRM) system to track client status and outcomes with support from a full-time Data and Outcomes Manager and a CRM consultant.
- Ensure that all client inquiries are responded to in a timely manner by running weekly CRM reports on unassigned and urgent cases.
- Combine case management services with an educational component to increase the capacity of clients to independently navigate city and state services, and increase independence and self-advocacy.
- Refer annually at least 50 Housing Clinic clients to WATCH's Job and Financial Management Clinic.
- Respond to the stress of housing-instability by implementing a mental health assessment benefiting clients as they present at the Housing Clinic, paired with referrals for mental health providers and resources.
- Strengthen relationships with at least five key agency partners by meeting with staff to find ways to maximize coordination and increase mutual referrals for clients.
- Increase capacity for services at the Housing Clinic by engaging three interns to assist case managers. At least 3 interns per year will be mentored one-on-one by their supervisors.
- Increase support for clients by screening and training volunteers to work with clients on housing-related tasks. Provide at least 3 group trainings annually for Housing Clinic tasks.
- Continue public outreach to increase client awareness of resources available via website, e-news and use of social media. Segment email list to provide more targeted information.
- Serve more clients by holding free workshops on how to apply for services, navigate state public housing, apply for affordable housing lotteries, and do a housing search.
- Submit 100 rent and utility assistance applications per year for clients who can't do so themselves and share information with 100 additional clients who are able to complete the applications on their own.

**2. Distribution of a minimum of \$50,000 per year to low-income residents in grants for basic needs.**

- Administer \$45,000 in grants from the Tenant Assistance Fund to help with emergency needs for clients for short-term housing, rent and utility assistance, moving costs, and food.
- Distribute at least 10 grants per year from the Back to Work Fund to clients to reduce barriers to work for items such as tools, supplies, transportation, work permit fees, and classes.

**3. Increased proficiency in English and integration into the community for adult immigrants.**

- Provide four to eight ESL classes four hours a week, for two 16-week semesters and one 12-week summer semester, serving 200 students per year.
- Conduct classes in an engaging, stimulating, student-centered environment with volunteer teachers and aides supported by a full-time Program Manager and part-time Assistant.
- Transition back to in-person classes and continue on-line offerings.
- Connect tutors with advanced English students in one-on-one tutoring pairs. Train and support 10 – 15 tutor pairs, which meet at least once weekly, to increase English language development for immigrants, as well as integration into the broader community.
- Guide students in setting academic and personal goals and assessing progress at the end of each semester.
- Use our CRM (Customer Relationship Management) system, Salesforce, to streamline student registration and to track students' progress.
- Provide a GED preparation class, meeting twice weekly, to interested residents.



- Provide training, curriculum development, and support for volunteer teachers and aides.
- Provide at least two 8- to 12-week sessions of citizenship classes annually.
- Provide other English learning programs and classes based on student and volunteer interests, such as conversation groups, book clubs, chess club, field trips and other enrichment activities.

**4. Increased financial stability for immigrants and low- to moderate-income residents.**

- Provide one-on-one job and financial management coaching to 75 residents per year.
- Hold 3 – 5 Job and Financial Management Clinic workshops per month, in English and Spanish, addressing needs of low-income residents.
- Add in-person (English and Spanish) workshops to current virtual offerings. Explore providing tangible incentives and childcare to encourage class participation.
- Track client outcomes for Job and Financial Management Clinic with follow-up calls or email/text survey quarterly.
- Partner with local community colleges to host information sessions on application and entrance requirements, degree programs, and financial aid opportunities.
- Teach basic computer skills (in English and Spanish) in small group workshops and one-on-one to help clients get email addresses, fill out online applications, and perform online job searches.
- Hold educational sessions on GED requirements.
- Post on our website and social media instructional videos (in Spanish and English) on creating a resume, opening an *indeed* account, uploading a resume, and other career needs.

**5. Education and preparation of first time home buyers in the region.**

- Offer 9 – 10 high-quality first time home buyer courses and attract participants from Waltham and surrounding areas, with at least 200 resident graduating from the course and receiving a completion certificate annually.
- Secure bank partners to sponsor and present at the first time home buyer courses.
- Obtain CHAPA re-certification for our First Time Home Buyer courses in 2022 and 2024.

**6. Expanded access to safe and affordable housing units in Waltham through community organizing. Tenants engaged in legislative advocacy, outreach, and voter registration.**

- Engage low-income tenants through community organizing to identify community needs and advocate for policies to increase access to safe and affordable housing.
- Organize monthly Tenant Action Group meetings, at which tenants set strategy and carry out plans related to campaigns.
- Educate residents about tenant rights, city housing policy, and residents' ability to bring about policy change and support affordable housing initiatives.
- Provide opportunities to our members for engagement in local decision making around housing policies.
- Support the Tenant Action Group in researching and developing proposals to increase access to safe and affordable housing, such as a tenant protection and notification ordinance.
- Co-host candidate forums with the League of Women Voters for local elections. Solicit questions for the candidates from WATCH clients and members.
- Develop annual plans for how, when, and where to register voters.
- Engage volunteers, interns, staff, and tenants in carrying out a voter registration plan that includes tabling and canvassing in low-income neighborhoods.

- Identify development partners to work with WATCH in order to increase the number of affordable housing proposals presented to and approved by the Waltham Community Preservation Committee and Housing Trust Fund.

#### Section 5: How success will be measured and/or evaluated

WATCH will implement a Customer Relationship Management (CRM) system for all programs, to track case management for the Housing Clinic and the Job and Financial Management Clinic, for Adult Education enrollment and student progress, for tenant engagement in community organizing, for volunteer recruitment and engagement, and for contacts and communications with key agency partners.

As part of WATCH's grant with Newton-Wellesley Hospital, the evaluation process for 2023 – 2026 for WATCH's Job and Financial Management Clinic, Housing Clinic, Tenant Assistance Fund, and Community Organizing will be guided by Jill Capitani of the U Mass Donahue Institute.

The evaluation process with Donahue Institute will include:

- quarterly evaluation check-in meetings with the WATCH Executive Director and relevant staff to report on changes, progress and challenges;
- annual review of Salesforce data, staff and client workshop information and attendance data, and community organizing data, collected by the WATCH Data and Outcomes Manager;
- staff and client workshop surveys, collected by relevant staff members;
- and bi-annual narrative progress reports, prepared by the Executive Director, program managers, and the Development Director.

The evaluation process for all WATCH programs, including the English Language Program and the First Time Home Buyer Programs, will include:

- Quarterly one-on-one meetings with the Executive Director and staff members to discuss progress, challenges, and client and student feedback;
- monthly staff discussions of program progress and challenges;
- distribution of workshop evaluations by relevant staff members;
- quarterly Board of Directors review of program data, including activities, attendance, and workshop surveys, prepared by staff members in written reports for the board;
- quarterly Advisory Board review of program data, progress, and challenges;
- annual review by staff of progress toward meeting goals and implementing activities of the CIP, reaching benchmarks, responding to client evaluations and feedback, and adjusting approaches and strategies.

WATCH measures success by reaching benchmarks, outcomes, and client satisfaction:

- Housing Clinic
  - At least 600 households receive assistance annually.
  - 100 applications for rent and utility assistance submitted.
  - 100 clients given information on how to apply for rent, utility, fuel, and moving assistance.
  - 100 clients avoid or delay eviction because of WATCH's intervention.
  - 50 clients receive counseling on landlord tenant law or state sanitary code.
  - 50 clients receive information on SNAP and free food resources.
  - 50 clients receive referrals for immigration or legal assistance.
  - 30 clients receive a mental health or healthcare referral.

- 50 clients receive information on free internet and cell phone services.
- 5 community partners have meetings with WATCH staff to coordinate referrals.
- Tenant Assistance Fund
  - At least \$45,000 annually is distributed in emergency funding.
  - At least \$5,000 is distributed annually from the Back to Work fund.
- English Language Program
  - 200 students enroll annually in ESL and GED prep classes, and tutor pairs.
  - 20 students enroll annually in citizenship classes.
  - Students make progress reaching academic and personal goals.
  - Annual course evaluations by students and volunteers are positive.
- Job and Financial Management Clinic
  - 75 clients receive one-on-one job search assistance and financial management coaching annually.
  - 3 - 5 Job and Financial Management workshops are held by WATCH per month.
  - 200 residents attend a free workshop on job search or financial literacy per year.
  - Workshop experiences and evaluations are positive.
- First Time Home Buyer Program
  - 200 potential first time home buyers attend courses annually.
  - Course experiences and evaluations are positive.
- Community Organizing
  - WATCH sets up a display and voter registration at 6 – 7 festivals per year.
  - TAG meets monthly.
  - WATCH publicizes 3 opportunities a year for members to be active in a community organizing campaign.
- Outreach
  - WATCH will create and distribute weekly free food guide
  - WATCH will host monthly meetings of the Waltham Interagency Network
  - WATCH will grow our electronic newsletter list from 3,900 to 4,200 subscribers in the next 3 years and offer segmented lists for specific program interests.
  - WATCH will increase information sharing on social media by adding 50 Twitter followers, 100 Facebook friends, and 50 Instagram followers per year.
  - Integrate a calendar of WATCH events into our website.

## **Section 6: Collaborative efforts to support implementation**

*Boston College Legal Services LAB (BCLAB):* WATCH partners with Boston College Legal Services LAB for 10 - 15 housing cases requiring legal intervention each year. WATCH Case Managers coordinate follow-up and communicate updates to BCLAB student lawyers and law professors.

*Bentley University:* WATCH collaborates with Bentley University to recruit interns and implement and market the Volunteer Income Tax Assistance (VITA) site. WATCH annually submits the application for grant funds to the Department of Revenue for Bentley and refers clients to the program. WATCH will work with Bentley to expand VITA accessibility by moving intake sessions to WATCH or the library.

*Brandeis University:* WATCH attracts 5 – 8 Brandeis student interns and volunteers each year. The interns and volunteers commit many hours to WATCH programs and activities, especially in the Housing Clinic and English Language Program.

*Business Partners:* WATCH has connections in the business community through our membership in the local Chamber of Commerce. Approximately 20 businesses donate regularly to WATCH. Representatives from the more engaged partners are invited to WATCH Advisory Board meetings.

*Children's Charter Mental Health Clinic:* WATCH has a 3-year contract with Children's Charter for this agency to provide guidance relating to supporting clients with mental health challenges, to provide at least two mental health workshops annually, and to share research on mental health resources and local mental health providers available to WATCH clients.

*Local Banks:* WATCH currently partners with nine local banks that sponsor First Time Home Buyer Courses. Some of the banks also make additional donations to WATCH through the CITC program and provide workshops to WATCH clients on financial literacy and credit building.

*Local Churches:* A number of churches in Waltham and the surrounding area are very supportive of WATCH in various ways. Churches sign letters of support for organizing campaign initiatives and individual church members speak to Waltham city council members to promote affordable housing. Church members serve as teachers, aides, and tutors at WATCH. Members volunteer in our office and at events. Churches also make donations to support WATCH programs. WATCH staff, clients, and students are invited to many of our church partners' events to share information about WATCH.

*Massachusetts State Legislators:* WATCH maintains contact with state legislators around constituent and local issues. Our State Senator and two state Representatives are familiar with and supportive of our work and refer constituents to WATCH for support.

*Metro Housing Boston (MHB):* During the pandemic, WATCH became a subcontractor for MHB, submitting over 350 applications for rental assistance to MHB, securing \$5 million in assistance for Waltham residents. WATCH continues to submit applications for Waltham residents and follows up. If there is a case with an imminent eviction, WATCH coordinates with MHB to expedite the assistance.

*The Right to Immigration Institute (TRII):* WATCH regularly refers students and clients to TRII for immigration assistance. We have cross referrals from TRII to WATCH's adult education and Housing Clinic services and we work together on the citizenship class held at WATCH. We also partner with TRII for clients who are applying for work permits, providing funding through our grant program.

*Metro West Collaborative Development (MWCD):* Metro West Collaborative Development is WATCH's current housing development partner. MWCD and WATCH identified the Waltham Armory as a potential affordable housing development site. Most recently WATCH and Metro West CD formed a collaboration, which was awarded a four-year \$1.9 million Housing Security Community-Based Health Initiative grant. We meet quarterly to review progress on our goals.

*Temple Beth Shalom:* WATCH provides monthly referrals of families in need of clothing and basic household items to the temple, and the temple collects and delivers household items.

*Waltham City Council and Mayor:* WATCH has several allies on the City Council and a respectful relationship with several other Councilors and with the Mayor. Councilors regularly contact WATCH staff with constituent needs around housing, utilities, and other basic needs.

*Waltham Community Preservation Committee (CPC):* WATCH has established a good working relationship with the Waltham CPC. WATCH obtained funding from the CPC for an affordable

housing feasibility study at the vacant Waltham Armory. WATCH will continue to seek funding for affordable housing proposals through the CPC and support any affordable housing proposals.

*Waltham Housing Authority (WHA):* The Waltham Housing Authority administered the \$2.1 million Local Voucher Program, for which WATCH secured funding. WATCH and WHA meet annually to review ways to collaborate. WATCH advocates on behalf of clients in rent arrears or facing eviction, and assists tenants in notifying WHA of their change in income, which impacts their rent amount. WHA also helps with information on the status of clients who are on waiting lists for public housing.

#### *Waltham Interagency Network*

WATCH created the Waltham Interagency Network seven years ago. The group has 190 members of Waltham agencies and holds monthly meetings. During COVID, the group met weekly reviewing needs of low-income residents. The network meetings allow for sharing of program information by local agencies for housing and basic needs.

#### *Waltham Public Schools*

WATCH partners with the Waltham Public Schools through a school liaison for the McKinney-Vento Homeless Assistance Fund. WATCH is contracted to provide case management services to families that are homeless or facing homelessness. WATCH receives 10 – 15 referrals per year from the school district and connects families with various resources and subsidies.

Other agencies that we work closely with to coordinate case management are the Community Day Center, which services chronically homeless residents; Waltham Partnership for Youth, who works with Latinx students who have recently immigrated; City of Waltham Housing Division, which runs a rental assistance program; JFCS, who is headquartered in Waltham and provides many services for low-income families; and REACH, who helps residents who are victims of domestic violence. WATCH has also coordinated annual coat drives and distribution with our partners at Healthy Waltham and held vaccine clinics with the Waltham Health Department and JRI. WATCH maintains a close relationship with the public library, currently holding workshops there and sharing information through flyers.

### **Section 7: Integration of activities/consistency with community strategy and vision**

From a broad perspective, the goals of WATCH's CIP, and its supporting activities, all address housing stability in Waltham. In the Housing Clinic, individual assistance, emergency financial assistance, referrals to other resources, and careful tracking and follow-up, all contribute to prevention of homelessness and fewer evictions. The use of informational videos and volunteer assistance expand the ability to serve more people. The addition of broader outreach to minority communities and addressing housing-related mental distress also increase housing stability in Waltham. Increased proficiency in English, US citizenship, and passing GED tests increases economic stability, which generally translates into increased housing security. Increased financial stability with the help of the Job and Financial Management Clinic also promotes housing stability. First time home buyer courses allow participants to take advantage of financial incentives and prepare participants to be successful homeowners. Finally, Community Organizing engages residents in increasing the stock of affordable housing in Waltham, and in expanding access to affordable housing. Both contribute to housing stability for low- to moderate-income residents of Waltham.

Three hospitals that serve Waltham have developed community and regional plans: Boston Children's Hospital (Waltham campus), Newton-Wellesley Hospital, and Mt. Auburn Hospital. Each hospital

writes a Community Health Assessment every three years. Boston Children's Hospital notes the lack of affordable housing as a significant factor affecting the city and its lower income population's health profile. It also notes the mental health issues faced by poor residents as a significant need. Newton-Wellesley Hospital notes that Waltham has the highest percentage of lower income residents in its service area and that the need for affordable housing is significant. They note that housing instability has direct effects on residents' health outcomes. Mt. Auburn Hospital notes that Waltham has the lowest proportion of white residents of its service area. It also notes that housing and food insecurity directly affect residents' health outcomes. Mt. Auburn Hospital is also committed to racial equity and to addressing the mental health needs of the community.

As indicated above, WATCH directly works to improve housing security, helps with food insecurity, reaches out to minority communities, and has added mental screening to its offerings. By doing so, we directly work to improve the conditions which hospitals identify as adverse to healthy communities.

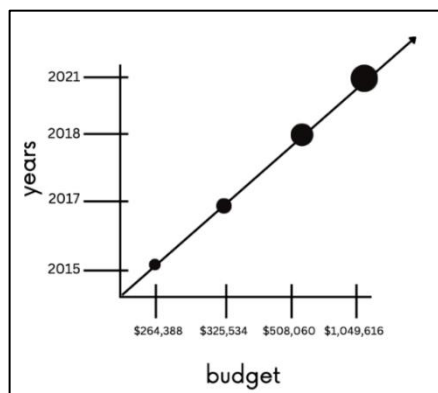
The City of Waltham created an Ad Hoc committee to address the city's housing needs. In its final report the committee noted the significant need for affordable housing in Waltham and recommended several avenues to address the need. In particular, the Armory was noted as a site to develop into affordable living units. WATCH has been very involved in this process and while currently stalled, we continue to actively work to provide more affordable units in the city.

In Waltham's CDBG Annual Action Plan for 2022 – 2023, More than half of the survey respondents identified a high level of need for (1) anti-poverty, food education, and food security services, (2) homeless assistance and prevention services, and (3) English as a second language (ESL) services. The plan states a goal to expand affordable housing using CPC funds and to coordinate with social service agencies to provide case management for those at risk of homelessness. Both of these goals directly overlap with WATCH's priorities and services. In the WestMetro Home Consortium Analysis of Impediments to Fair Housing Choice 2021 – 2025, it is noted that Waltham needs an easier path for non-profit housing development. WATCH's search for affordable housing partners for Waltham aligns with this need.

### Section 8 **Financing strategy**

WATCH will finance the implementation of the CIP activities through our historic funding sources: churches, individuals, businesses, United Way (CITC tax credits), foundations, program fees (FTHB course fees), and government contracts and funding. Our funding strategy is based on strong and effective programming, frequent communications with donors and prospective donors about our activities and outcomes, expressions of gratitude to and recognition of our donors, and a vigorous fundraising plan. WATCH's fundraising plan includes spring and fall direct appeal letters to about 500 individuals and 50 organization/business partners, frequent reminders about the benefits of the CITC Program, an annual mailing of a 24-page newsletter in English and Spanish, bi-weekly e-news postings, visits to churches, and reaching out to new foundations. WATCH's work with immigrants and low-income residents, promoting housing stability and economic security, appeal to our donors and funders. WATCH has a funded contract with the Waltham Public School System and receives a line item in the state budget as well as discretionary funding such as ARPA funds. WATCH is also in the catchment area of regional medical centers and participates in community health assessments for these and actively seeks funding to for programs that lie in the hospital focus areas.

Financing for WATCH's programs and activities has increased steadily for many years. This growth accelerated greatly during the COVID pandemic as WATCH increased staffing and program size significantly to meet the community need.



Income Source	2015	2021
Churches	17,551	40,519
Individuals	120,257	219,502
Businesses	44,617	294,184
United Way	14,731	117,110
Foundations	54,500	44,453
Program Fees	10,530	13,465
Government	2,202	97,750
TAF		222,633
<b>Total</b>	<b>\$264,388</b>	<b>\$1,049,616</b>

WATCH was uniquely positioned during the pandemic to receive funding for direct grants to tenants and to provide free one-on-one case management to low-income tenants. Throughout the COVID pandemic, WATCH facilitated weekly zoom meetings of 25 – 30 local social service agency staff members through the Waltham Interagency Network, to share services and programs and to problem solve around unmet needs. WATCH's reputation for advocacy and direct service to low-income tenants, our leadership with the interagency network, as well as our ability to provide support for tenants seeking rental assistance, resulted a significant increase in funding from individuals, foundations, and government agencies in 2020 – 2021.

Building on this reputation, WATCH received a significant grant from Newton-Wellesley Hospital in 2021. This four-year grant of \$1.9 million, was the result of a community engagement process facilitated by Newton Wellesley Hospital, which identified housing instability, and the related mental health needs created by housing insecurity, as a top priority for community funding in the hospital's catchment area. As part of a competitive grant process, WATCH's application was selected as the winner of the grant for a proposal that included a collaboration with Metro West CD.

This additional funding allowed for expanded staffing in our Housing Clinic to three full-time staff members, a full-time Job and Financial Management Clinic Coordinator, program expansion to include staff mental health training and screening for clients as they come to our programs, provided \$45,000 in annual funding for tenant assistance, and funded \$5,000 a year in Back to Work funds to help low-income tenants in Waltham and the other towns in Newton Wellesley Hospital's catchment area.

Only in 2021 did WATCH use its full tax credit allocation within the first year. That utilization included a \$50,000 allocation of tax credits to United Way. WATCH's strategy is to grant tax credits to all individual donors, to donations from banks, to the Foundation for Metro West to the extent possible, and to Cambridge Savings Bank to the extent possible.

WATCH anticipates the funding sources indicated below for FY23.

INCOME	FY23 BUDGET
United Way (CITC)	100,000
Organizations/Businesses	100,000
Newton-Wellesley Grant	265,000
Tenant Assistance Fund	80,000
Foundations	45,000
Churches	30,000
Government	240,000
Individual Donations	225,000
FTHB Class Fees	8,000
Total	1,093,000

Funds will be allocated to the programs and activities indicated below for FY23.

EXPENSES	FY 23 BUDGET
Housing Clinic	378,217
Tenant Assistance Fund	85,000
English Language Program	157,078
Job and Financial Mgt Clinic	118,480
FTHB Program	31,408
Community Organizing	163,557
Fundraising	73,543
Administration	92,381
Total	1,099,664

## **Section 9: History, Track Record and Sustainable Development**

### *History and track record*

WATCH's history and track record of past practices and approaches implementing Housing Clinic activities is significant.

- The Housing Clinic began as a project of Brandeis University in 2007, run by students interns who were trained and supervised by a Brandeis professor. The clinic expanded to a core WATCH program, led by a part-time, and then full-time Director. The clinic is currently run by a full-time Director, and two full-time bi-lingual Case Managers. The clinic responds to a broad range of housing and basic needs.
- The Housing Clinic expanded its partnerships from one with Boston College Legal Services LAB, to a host of partnerships, including Metro Housing Boston (resulting in \$5 million in assistance for 400 households), The Right to Immigration Institute, Waltham Public Schools, and many others.
- In 2015, the Housing Clinic implemented a CRM to track clients, services, and actions taken. The CRM was expanded in 2022 to include tracking outcomes and to coordinate internal referrals for the Tenant Assistance Fund, Adult Education, and the Job and Financial Management Clinic.
- WATCH's Tenant Assistance Fund was a small fund of less than \$2,000 per year, managed by the Housing Clinic. At the outbreak of the COVID pandemic in 2020, the fund grew into a major funding source for clients who could not get assistance through local, state, and federal sources. WATCH distributed over \$635,000 in financial assistance to local tenants. The amount was second only to the City of Waltham in the amount of funds given locally.

WATCH's English Language Program began in 1993 with one part-time instructor, two night classes per week, 23 students, and a waiting list of more than 300 people.

- Currently the program is staffed by a full-time Manager, a part-time Assistant, and \_\_\_\_\_ volunteer teachers and teacher aids.
- Six classes meet twice weekly. Each class is a 2-hour class. Classes are offered at beginner, intermediate, and advanced intermediate levels.
- Tutors provide one-on-one instruction for more advanced students.
- GED prep and citizenship classes are also offered. In addition, conversation groups and book club groups meet throughout the year.



- WATCH no longer has a waiting list and has rolling admissions. During COVID, WATCH transitioned from charging a small fee for classes to providing all classes free-of-charge.
- WATCH has the largest and longest running Adult Education Program in Waltham.

WATCH hired its first Community Organizer, part-time, in 1991.

- WATCH organized support for the City Council to pass the Inclusionary Zoning Ordinance in 1991. WATCH advocated for the increase of the percentage of affordable units to 15% in 2019 and supported the increase to 20% in 2020.
- Throughout its 34-year history, WATCH has organized multiple tenant associations at apartment complexes within Waltham to moderate rent increases and address safety concerns.
- In 2005, WATCH advocated for creation of the Community Preservation Act.
- In 2015, WATCH conceived of and gained passage of a \$2 million Rental Voucher Program, providing rental assistance for up to three years for low-income tenants.
- In 2019, WATCH organized for and was awarded \$30,000 for the assessment of the Waltham Armory as a suitable project for affordable housing.
- Recently WATCH drafted and supported a Tenant Notification Ordinance to provide information and resources to tenants.

WATCH's history in job and career assistance began in 2001, when WATCH organized a job readiness program and a health care worker program.

- In 2018, WATCH partnered with Mass Hire to provide a once-a-week Job Clinic at WATCH, staffed by a Mass Hire Job Coach.
- In 2019, WATCH offered a once-a-week Job Clinic, staffed by a volunteer. The clinic provided assistance in resume writing, job search, and interview preparation.
- The current Job and Financial Management Clinic began in March, 2022. A full-time bi-lingual coordinator organizes workshops and provides one-on-one assistance.
- WATCH is currently the only provider of free job coaching assistance in Waltham.

WATCH began offering First Time Home Buyer courses in 1993.

- WATCH's FTHB course has received the CHAPA seal of approval for the last 19 years, meeting all requirements and consistently getting positive review reports.
- WATCH's FTHB course expanded from 4 times a year to 10 times a year.
- WATCH has established partnerships with banks and other specialists such as home inspectors, realtors, and finance specialists to provide a rotation of excellent presenters for our courses.
- WATCH now provides the course virtually and draws participants from throughout the region.

### *Sustainable development*

WATCH operates congruently with the Commonwealth's Sustainable Development Principles to the extent that our activities overlap with these objectives. Specifically, WATCH's plan supports the Commonwealth's goals to:

#### 1. Concentrate Development and Mix Uses

WATCH focuses on Waltham's South Side, where most of its low-income residents live. The South Side is the town's commercial center, has mass transit, houses the town's municipal infrastructure, and contains dense rental housing. Additional affordable housing here would support local small businesses, connect them with low wage employees, and possibly enable the development of degraded structures. WATCH focuses on renovating existing rental buildings or converting abandoned structures.

2. **Advance Equity**  
Every aspect of our work advances the condition of low-income and immigrant residents. Our governance is structured to give these communities a voice. Our community organizing helps them have a role in the town's future. WATCH has pledged to examine and adjust our outreach and practices to reflect our commitment to racial diversity, equity, and inclusion.
3. **Make Efficient Decisions**  
Externally, WATCH works to influence town government to plan for a future which includes resources for its low-income and immigrant residents so that problems are not met with hasty, ad-hoc solutions. Internally, a major focus has been implementation of a CRM system to efficiently manage a rapid expansion in our load.
4. **Protect Land and Ecosystems**  
Our focus on development of existing or abandoned structures helps limit the green field development in town and ,to the degree that such development infringes on open space, we limit its development.
5. **Use Natural Resources Wisely**  
Wherever we have been involved in development or renovation, we focus on energy efficiency. This can significantly reduce ongoing expenses to the tenants.
6. **Expand Housing Opportunities**  
This is our mission and each of our programs affects this either directly through development, financial support, and advocacy, or indirectly through language and job skills.
7. **Provide Transportation Choice**  
WATCH also provides transportation through gas and MBTA cards, as well as paying for scooters and bicycles with our Back to Work grants. Our primary intersection with this goal is our focus on Waltham's South Side, which has both commuter rail and bus access.
8. **Increase Job and Business Opportunities**  
Our Adult Education Program and our Job and Financial Management Clinic focus on both language and job skills with the specific goals of improving our clients job prospects.
9. **Mitigate and Adapt to Climate Change**  
Our focus on development in the dense South Side of Waltham can help reduce the carbon footprint by bringing our clients housing, work, and shopping into a denser walkable area.
10. **Plan Regionally**  
WATCH works with not just local Waltham organizations but also with regional hospitals and other regional social service agencies to develop not only our own 5-year plans, but also to provide input in the planning of those regional organizations.