



**Codman Square Neighborhood Development Corporation  
Updated Community Investment Plan  
Submitted November 2019**

The **10-year** Millennium Ten (Mill10) Community Contract/Plan, which was created by almost 1,000 community stakeholders in 2012-2013, continues to serve as the Community Investment Plan (CIP) for Codman Square NDC (CSNDC). The Mill 10 Plan extends through December 31, 2022), and is still very relevant today. Over the past 2 years, CSNDC has developed several other plans that are coordinated with the Mill 10 Plan. Those plans include: the 2017-2019 CSNDC Strategic Plan, which has been extended through 2020, the FY 2020 NeighborWorks America (NWA) Operating Plan, the 2019 Leading for Impact (LFI) Plan and the 2018 Race, Equity, Diversity and Inclusion (REDI) Plan. All these plans, combined with the Mill 10 Plan, which is the base plan, represent CSNDC's CIP.

The design phases for the most recent plans (NWA Operating Plan, Leading for Impact Plan and the REDI Equity Plan), occurred between fall 2017 through fall 2019. We worked with a range of parties to develop these Plans, including community stakeholders. CSNDC senior managers collectively, took the lead in developing the 2020 NWA Operating Plan. The Barr Foundation sponsored CSNDC's engagement in the 2 year Leading for Impact (LFI) process, and consultants from Bridgespan supported us in development the LFI Plan. Finally, our Equity Plan, which is still a work in process, was created with the support of the Center for Equity and Inclusion who NWA consulted with to assist its affiliates become more equity-focused organizations, as part of the 2 year Race, Equity, Diversity and Inclusion (REDI) initiative that CSNDC was selected by NWA to participate in.

During 2018, with the support of Bridgespan, we developed a theory of change model through the Leading for Impact work, which guides the implementation of all of the plans, including the Mill 10 Plan. The goal of the LFI project was to determine the "So What?" factor. "So What" means: are the many services offered by CSNDC making a difference in the lives of those we care about? The senior management team worked within the LFI programmatic architecture, on a series of learnings throughout late 2017, through summer 2019, with focus on creating a "Seamless Integration (SI, Housing First (HF))" model. Additionally, as a result of our NWA-funded Race, Equity, Diversity and Inclusion (REDI) work, we are viewing everything we do through an equity lens. As we develop programs and services, we focus on answering the following questions: Who might be included/excluded? Served/Underserved? Resourced/Exploited? Validated/Oppressed? The NWA Operating Plan sets forth the annual work that CSNDC will do to further our strategic and Mill 10 work, using the lens and operating approaches developed through the REDI and LFI processes.

The key goals, activities and features of our plans are outlined in Sections 3 and 4, below. The lenses we view all the work we do, across the collective plans include:

- Equity-focus, with a particular emphasis on racial equity, due to the disparities that exist based on race, on many socioeconomic mobility/health indicators;
- Outcome measurement and Client Input methodology: Getting feedback from the ultimate consumers on existing and new program service ideas, before launching with the goal of increasing efficacy and impact;



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**Section I. Community or Constituencies Served by the Organization**

We continue to serve our south Dorchester service area, though we've expanded, into adjacent communities, such as Mattapan and Hyde Park in the past, at the request of other nonprofits with limited capacity. Our 3 sq mile service area is bounded by Blue Hill Ave, Columbia Rd, Geneva Ave, Dorchester Ave, and Morton St. Approximately 45,000 people live in our service area, one of the densest in MA; the overwhelming majority of which are low and moderate income Afro-Americans/Caribbean and Latino. Predominant languages besides English include Spanish, Haitian and Cape Verdean Creole and Vietnamese, with a growing Southeast Asian population along our northwest border. The median income, hovers around \$33,000. Most of the housing stock in our service area is well over 50 years old, and Codman Square is a historically significant area with a number of sites on the historical register. Population education levels trend about 25% with less than a high school diploma, 55% with a high school diploma and about 25% with some college/collage graduate. The Black population slightly declined between 1980-2012 and the White population nearly doubled in that same period. Anecdotal information indicates that many of the newcomers are of higher income. Displacement is a key concern in our service area, and at the center of our work and strategies.

Our focus is on serving low and moderate income people, the vast majority of whom have incomes at or below 80% AMI. We will continue, through our REDI work, to apply an equity lens and target vulnerable and high impact populations such as men of color, those in jeopardy of displacement and residents living in CSNDC-developed housing for the income mobility and social stability strategies outlined in the Plan. Our Eco-Innovation District (EID) is located in a sub-neighborhood of Codman Square, which is bounded by Talbot Ave, Norfolk St and the Fairmount Commuter rail line, continues to be a focus area for our sustainability work and beyond. We have a specific focus in the Talbot Norfolk Triangle Eco-Innovation District, on environmental and energy sustainability. Codman Square NDC continues to be positioned to take a multi-disciplinary and network approach addressing the city's most pressing disparity issues of income, racism, education, environment, and health care through its programs.

**Section 2. Involvement of Community Residents and Stakeholders**

In addition to the engagement of almost 1,000 community stakeholders, who designed and developed the **10-year** Mill 10 Community Contract/Plan from 2012-2013, which is still relevant and in implementation to this day, we continue to engage residents in directing and guiding the work of Codman Square NDC.

The methodologies and processes developed in 2018, through the Bridgespan-led Leading for Impact (LFI) planning process, requires us, at the institutional level, to engage those who are targets of any proposed service to have input into that service, prior to the launch of new programmatic efforts. We also are institutionalizing post-service evaluations and assessments to determine stakeholder sentiments on service utility, efficacy, outputs and outcomes. This has involved convening small focus groups, to garner input and feedback and to test interest and guide development of service programs and activities. Resident leadership and input has influenced these larger organizational operations. In 2019 CSNDC launched our Seamless Integration/Universal Intake pilot. This process was meant to



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increase efficiencies in regards to service delivery, cross departmental collaboration, and data collection. Prior to officially launching the pilot approach, our Community Organizing & Resident Resources (CORR) department convened a focus group of 11 residents to review the service delivery methodology, universal intake process, the logic behind the survey questions, and what they would like to see improved in regards to service delivery. The outcome of that feedback, while confirming our program and methodological approach, indicated a need to focus more on seniors. That led us to focus more on senior support services, and via our Healthy Neighborhood Equity Fund study (HNEF) work, resources were identified from the Conservation Law Foundation to support senior housing and basic needs, working through the two HNEF Resident Researchers, who, themselves, are elderly. The same two Resident Researchers presented senior services available at CSNDC's June 2019 Annual Meeting and with CSNDC staff support, hosted a senior resource table at the event. As an offshoot, the two Resident Researchers have launched a senior computer training class. Additionally, planning is afoot for how to secure senior homeowners in place through resources like the intergenerational shared housing Nesting Program that the City of Boston is exploring. The initial resident focus group was crucial in shaping the final stages of the Leading for Impact (LFI) Seamless Integration/Housing First (SI/HF) development prior to launch. Throughout this pilot year, CORR staff would garner feedback on the intake process and share with our Database Management/Systems Dept. who made several adaptations to the process based on this feedback.

CSNDC residents and community members who live in the surrounding neighborhood continue to inform, guide, offer feedback and redirection when necessary in regards to work that the Community organizing & Resident Resources Dept (CORR) engages in. A prime example of this is the "Brother's Building" men of color (MOC) cohort of active community members. The "Brothers Building" forums are an off shoot of our participation in the "Male Engagement Network". CORR staff created the platform (monthly convenings in one of our community rooms) and promoted it as a "co-creation" opportunity. This approach allowed participants to take ownership of the work from the beginning and work in tandem with organizing staff to set an agenda and direction for the burgeoning group. Out of this process emerged many ideas and actions including participants leading a men's hike to Blue Hills Reservation, organizing and facilitating a Father's Day event encouraging and uplifting fathers in the community, reactivating an annual winter coat drive (which a previous MOC group, "Men of Color, Men of Action", used to do as service event), lead a neighborhood walk and exercise excursion as well as collaborate with CORR staff and cross neighborhood agency partners, as part of the Male Engagement Network, to craft the agenda and facilitate the first annual "Brothers Building: Men's Well Conference".

Our Women of Color Gathering Circle (WOC) is another prime example of how community input lead to expanding the scope and depth of the work CORR was engaging in. This program, which entails a monthly gathering of women of color across a wide age and experience spectrum, came out of our already existing Daughters of the Dust/Girl Trek walking group. Participants in the walking group wanted to expand the idea of reclaiming their health and community space so suggested, and then worked with CORR staff to create this monthly forum that explicitly addresses health & well-being as



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well as the idea of “healing”. Since launching this initiative the group has grown to 21 women who participate in this monthly ritual of connecting and lifting each other up in the spirit of sisterhood.

The Resident Leadership Institute (RLI) exemplifies the notion made popular by Massachusetts Congresswoman A. Pressley, “those closest to the problem are closest to the solution”. RLI is a 24 hour organizing, advocacy, and meeting facilitation curriculum that CORR convenes with existing & emerging resident leaders from our portfolio of housing and surrounding community. A major component of the class is participants identifying and developing an action plan in which CORR staff assist in them achieving. Out of this process residents have developed and employed action agendas to engage with the MBTA to clean up areas of the rapid transit system close to their homes, engaged with the City of Boston to activate long abandoned open space in the community as well as taken over organizing and facilitation of the annual National Night Out event in Codman Commons.

in 2018 in trying to determine the best approach to re-launching our of a “recoverable” grant for home loan rehab program, we convened a focus group of homeowners that went through our foreclosure prevention program to get input into our proposed rehab “loan/recoverable grant” program. That group of about 10 homeowners provided us with information about what features and services would work best for them in terms of rehab “lending’ support. The feedback was incorporated into CSNDC’s RFP soliciting proposals from lending institutions that required streamlined application and underwriting process, and requirements more lax than conventional products. Additionally, lending institutions provided proposals that incorporated disbursements upon achievement of milestones, and required signatures by homeowners and lending institution. Their comments have also been considered and factored into our program design, which now is framed as a “recoverable grant” that can be paid down/forgiven in return civic engagement.

We also regularly collect information through program service channels via formal surveys. For example, our First-Time Homebuyer and Financial Fitness Programs do formal post-survey evaluations, aimed at getting participant feedback on Program instructors, and to evaluate the application of content to their day to day lives. Each year we collect at about 50 such surveys in these ways. Key themes that have emerged from the surveys are the need for more financial planning support, in regard to methods to decrease tax liability, as well as the investment focus area—particularly as it relates to maximizing the use of wealth building tools such as the stock market, IRAs, CDs and other financial instruments. This feedback has informed our next stage financial management approach: similar to identifying pro-bono legal support for Estate Planning (we’ve now done almost 50 estate plans for low/moderate income homeowners this past year), we now have to identify low cost or pro bono financial planners to support this emerging need.

We also garner feedback, informally, through regularly scheduled stakeholder meetings, such as our small business/merchant meetings that are held almost monthly (about 10 meetings per year). About 30 local businesses participate in these meetings that are designed to build cohesion within the merchant community in Codman Square, and to support merchant needs identification, resource development and issues advocacy, while also implementing concrete special events such as sidewalk



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sales, holiday store decoration contests and the annual JerkFest within the commercial district. We uncovered important information from merchants on partner agency referrals made by CSNDC that uncovered the need for more focus on building a base of partners who are culturally competent, in terms of service delivery. For example, one merchant commented that a referral to a well-known small business TA provider did not meet their needs as the provider failed to understand the merchants' business model and did not respect or listen to the merchants' needs. Merchants also articulated that they wanted to expand into City contracts, but that the burdensome administrative process for bidding on City jobs was too much to manage (e.g., need to write and respond to an extensive RFP, with limited business capacity to do so, and need for detailed financial statements that required the hiring of a CPA, something the business could not afford to do, instead of accepting basic tax returns). Through these informal feedback channels we've been able to better plan program services and advocate for small businesses. CSNDC was selected as a TA provider by the city of Boston, during the RFP and review process we along with other partner agencies strongly advocated for the City of Boston to select providers that were multi-lingual and exhibited cultural competency and tolerance. The city of Boston selected a diverse group of sixteen TA providers, and additionally secured translation services for TA providers who were not multi-lingual.

In spring 2018, we convened a small group of Men of Color (MOC) to provide comment on the Arborist Training Program that we launched that year. The men reaffirmed the both the programmatic approach we were taking along with the efficacy of the approach. They also had input into a meeting with the United Way, in which they told their stories and articulated their needs to this major funder. Additionally, residents who received newly planted trees in their yards, advised us that fruit, not "regular" trees were the trees of choice, based on their family experience and cultural perspectives.

Over 100 residents continue their integral involvement in guiding our work via the ongoing "Together We Stand Community Speak Out" series, through which residents tell their stories/speak of their experiences on topics such as displacement. Based on the testimony of the youth at a November 2019 "Speak Out", we will plan with our youth, a 'this is what displacement looks like' art night.

So, community stakeholders are definitely involved in guiding our plans and programs. Our Board, via regular and formal Progress Reports provided by staff, monitor our work.

### **Section 3. Plan Goals**

Key work goals we'll continue to pursue and strengthen from our Mill 10 Plan, 2017-2019 Strategic Plan, and NWA Operating Plans, as augmented by the Leading for Impact and REDI Plans include:

- Mill 10: Codman Square NDC will continue to pursue implementation work in 5 of the 7 "Big Ideas" flowing from the 2012-2022 Mill 10 Community Contract/Plan. These include:
  - Creation/Strengthening of a Community Café
  - Business Cooperative
  - Eco-Innovation District
  - Men of Color Wellbeing
  - Anti-Displacement Advocacy and Housing Development



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- 2017-2019 Strategic Plan, this plan continues to be relevant for the coming year and beyond, and we will focus on the following:
  - Anti—Displacement and Affordable Housing Development
  - Environmental/Energy Sustainability and Green Jobs
  - Health and Wellbeing: with a focus on Men of Color
  - Community Cohesion: Uplifting Community Voice, Advocacy and Engagement
  - Equitable Economic Opportunity: Stimulating Asset Development and Preservation, Small Business Development and Financial Capability
  - Operational Excellence: Maintaining High Standards for Operations/Service Delivery

*Increased focus on building our Equity Army, Going Deeper on Asset Building, Asset Preservation and Asset/Wealth Management and Green Jobs (Green Infrastructure Training & Certification) Work:*

Given the rapid gentrification and displacement that we are seeing in our community, we remain squarely focused on educating and mobilizing/organizing residents and other stakeholders to lift their voices up to be heard on this issue. We continue to work collectively with the Right to the City/Homes for All Coalition, and are stepping up our organizing and base building/mobilization work with our two CDC peers in the Fairmount CDC Collaborative. We continue to build this component of the Equity Army, to develop an anti-displacement platform and legislative policies to quell displacement. This work has been heightened through the addition of an organizing consultant, Sarah Horsley, who was hired in summer 2018 to develop the base building campaign with the Organizers from the FICC: Codman Square NDC, Dorchester Bay EDC and Southwest Boston CDC.

As a result of the aforementioned goals, low/moderate income residents will reduce their energy and transit costs, improve their health (through new Case Management and social service capacities, reduction of greenhouse gases, development of a Green Infrastructure Training & Certification program, anti-smoking campaigns), and increase their access to healthy foods and to job and career preparation (through Codman Square NDC's Men of Color and Urban Agriculture work) so as to move up the socioeconomic ladder. The community will also benefit as people save money through provision of affordable, transit oriented housing as part of Codman Square NDC's Eco-Innovation District efforts with the Fairmount Transit Coalition and Fairmount CDC Collaborative. Community Stakeholders will be stabilized in place through foreclosure prevention efforts, have a gathering place to meet, connect, eat healthy food and get to know each other better (as through the Community Cafe). High impact populations such as males of color will be provided with life stabilizing support such as employment, pre-employment, healthcare and mentoring which has implications for reductions in crime and violence in the community. In greater detail, the key goals of our Mill CSNDC's 2016-2019 Strategic Plan are; 1) Anti-Displacement, 2) Sustainability/Green jobs (Eco-Innovation District), 3) Economic and Commercial District Development, 4) Job and Entrepreneur Development, 5) Estate Planning, 6) Community Café, 7) Financial Opportunity Network, 8) Health, 9) Community Cohesion, and 10) Rehab Lending.

#### **Section 4. Activities to Be Undertaken**



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The activities to be undertaken are partially outlined in Section 3 above as well as the impact on the community. We will pursue the activities outlined in the “Priority Area Goal Statements” in the attached excerpted 2016-2019 Strategic Plan, as well as Codman Square NDC’s base services that include affordable housing development, small business development, civic engagement and leadership development, financial literacy, foreclosure prevention and youth enrichment services. All of these base services are being integrated into the broader “big ideas” and “priority areas” flowing from the M10 Plan and the 2016-2019 Strategic Plan. The community, as a result of these efforts will be healthier and experience greater economic prosperity as a measure against socioeconomic benchmarks (e.g., level of employment, air quality, physical health, ability to self-advocate, increased homeownership, homeownership preservation, increased affordable housing and transit, etc). As previously mentioned, we will filter all of the work we do through the equity lens, in keeping with our REDI plan/work, and also follow the silo-busting, client monitoring, tracking and output/outcome measurement protocols dictated by our Leading for Impact Seamless Integration/Housing First methodologies and protocols.

As mentioned above, low and moderate income people will increase socioeconomic mobility through their engagement in our programs, as measured by financial, health and emotional wellbeing.

NWA Operating Plan: This is the Operating Plan that addresses, on an annual basis, the detailed work and activities we’ll pursue as relates to both the Mill 10 Plan, as well as our 2017-2019 Strategic Plan. Operating Plan methodological approaches are guided by the work that we’ve done from 2017 to 2019 in the Leading for Impact and REDI planning processes. See the attached NWA Operating Plan for more information about our goals and activities. Sample key objectives over the next 3 years include: (a) Launching CSNDC’s Green Infrastructure (GI) Training & Certification Program through outreach to MOC, residents, minority contractors and builders, and high school seniors. CSNDC staff are now certified as trainers for the National Green Infrastructure Certification Program (NGICP--a 35-hour national training and certification program) (b) Build CSNDC’s Sustainability Equity Army, and turn out local advocates/leaders to articulate their climate and environmental justice issues, and to develop and implement an advocacy plan; (c) Launching our Family Self-Sufficiency Program to assist tenants of CSNDC developments save money for homeownership, education and other purposes; (d) Eviction Prevention: Increase/extend our financial capabilities work to tenants of CSNDC-developed housing to maximize their ability to stay in place; (e) Next stage development of wealth creation/preservation strategies, to include strategic expansion of credit building services, estate planning for intergenerational wealth transfer and adding more sophisticated financial advising and tax planning expertise to build wealth; (f) increase small business development capacities to include online marketing, tax planning support, etc); (g) Completion of existing 182 unit affordable housing pipeline; (g) Scope out an additional 50-100 units of affordable housing; (h) Continue building our Anti-Displacement Equity Army activists to develop advocacy platform and legislative strategies to stem displacement; (i) Grow our Ballou Urban Ag site to scale, increasing produce poundage and financial self-sufficiency; (j) Fully operationalizing our Seamless Integration/Housing First Salesforce-based client/outcome measurement system.

**Section 5. How Success will be Measured/Evaluated**



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Through Leading for Impact Seamless Integration(SI)/Housing First (SI/HF) work with Bridgespan, we developed a new Salesforce-based client tracking and monitoring system, to determine, from the moment a person entered our office requesting services the following: who interacts with the person; who does a full assessment of the person’s needs, using the newly developed Universal Intake Form “UIF” process, what was the priority service need identified, along with the secondary needs, what service was delivered, with what output or outcome. The SI/HF model was piloted in January 2019 and became fully operational by April 1, 2019. To date, we’ve had over 130 people processed through the system. Part of the SI/HF model.

Additionally, all of our annual goals, as articulated in the NWA Operating Plan, are framed in SMART terms. These goals are uploaded into Salesforce, and on a quarterly basis, we are using Salesforce, along with an accompanying Excel spreadsheet, to assess progress towards these goals.

It is through the SI Salesforce based system that we will monitor our progress on our goals, and the outputs and outcomes of our work. Additionally, the Leading for Impact work helped us break down silos within the agency in an effort to maximize and facilitate cross-departmental planning and work. We examined organizational culture issues which were hindering our efficacy and service delivery. We developed through the SI/HF Salesforce based platform, a regimented intra-departmental client service referral and tracking protocol, that is time bound. We also developed tools to facilitate cross departmental work and coordination, including MOUs that spelled out the roles and responsibilities each department had in coordinated work, along with checklists to further clarify the who, what, when and where of collaborative work. We reviewed meeting protocols with an eye to making our meetings more productive, and less perfunctory, and developed a standardized meeting agenda focused on agenda setting/clarity, expectations, outcomes, deliverables and next steps.

In addition to all these means of furthering and evaluating our work, each senior manager meets weekly with the Chief Operating Officer and the Executive Director to assess progress. We have set goals, timeframes, and benchmarks which will guide our evaluation of early, intermediate, and long-term accomplishments. Codman Square NDC senior staff meet regularly to review their workplans (developed from the Strategic Plan). Quarterly progress against meeting the NWA Operating Plan goals and activities is also reported to the Board. See Section 9, also, for how NWA evaluates CSNDC.

**Section 6. Collaborative Efforts to Support Implementation**

Strong partnerships and strong resident engagement have and continue to be leveraged to create real neighborhood change. A key feature of Codman Square NDC’s work is that essential initiatives and program services like the Mill 10 Plan, the Eco-Innovation District (EID), the OASIS on Ballou Urban Agricultural Project, our Men of Color Initiative, Together We Stand Series, our new Eviction Prevention Initiative and our soon to be launched, Green Infrastructure Training and Certification Program, and others emerge out of collaborative efforts. As a result of our partnership with Metro Boston (MH), we launched an Eviction Prevention Program in which MH Case Managers worked with our staff to prevent evictions through access to emergency rent assistance (RAFT), as well as through case management support. MH staff are now training CSNDC staff on housing search techniques, a much





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needed service, particularly as our community gentrifies, and people have difficulty finding affordable housing. This will expand CSNDC's capacity to prevent displacement.

Our work as part of the Fairmount CDC Collaborative, Fairmount Transit Coalition, the Fairmount Greenway Taskforce and with local residents has helped to integrate open green spaces, transit oriented development, affordable housing, and commercial hubs into cohesive and connected neighborhoods. Through the Fairmount Greenway Taskforce, OASIS on Ballou, once a vacant and neglected City-owned lot, has been transformed into a 23,000 sq ft urban agriculture site, which not only has produced over 5,000 lbs of affordable fresh produce, but also serves as a center for training, social cohesion, and social entrepreneurship.

Additionally, as a result of our Fairmount CDC Collaborative work, we were recently awarded a \$100,000 planning grant from Kresge Foundation to mobilize community stakeholders around climate threats, health, and equity and lead planning for an advocacy campaign for policies that will increase community climate resilience and lead to a resident-developed Advocacy Plan that reflects the community's economic, quality of life, and health priorities related to climate resilience (e.g., the Plan might push for transit equity, green infrastructure jobs, and air and water quality remediation.) If successful in the planning year, Kresge will award a 2-4 year grant to work with stakeholders to implement the Advocacy Plan and continue building community voice and power to realize the Plan.

Our Eco-Innovation District (EID) Director will lead the Kresge work. EID will also work with local residents, business owners, academic institutions, government agencies, non-profit partners and funders to continue building green infrastructure in the Talbot Norfolk Triangle-Eco-Innovation District (TNT-EID), a 13-block area within Codman Square NDC's broader service area, and beyond. As a result of our partnership with Resonant Energy and Lime Energy, we've installed solar on several homes and businesses, and have done energy retrofits for 24 stakeholders.

In summer 2019 EID launched a pilot Green Infrastructure Training & Certification program in partnership with The Nature Conservancy (TNC), with the support of a joint \$250,000 multi-year grant from the JPB Foundation. Working with Earth Watch and TNC, in summer 2019, sponsored 3 low/mod income people in learning green infrastructure techniques through a 3-session practicum at Franklin Park Zoo, in which they were able to observe the installation of rain gardens. This initiative combines multiple categories: Race Equity Diversity and Inclusion (the Equity lens), Men of Color (MOC) development-a core population focus for CSNDC, green/sustainable development, and social enterprise development. We will fully launch the Green Infrastructure (GI) Training and Certification program that we've spent the past year scoping out in partnership with The Nature Conservancy. We're now advocating for policy change so that the low/mod income people (LMI) & MOC we'll Green Infrastructure (GI) certify, are prioritized for employment on City capital jobs that now, under EPA decree, have to be completed in a more environmentally sustainable way. Through this collaboration, we are positioning CSNDC, as an agency, for national certification as a Green Infrastructure trainer, part of our social enterprise development goals.



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There are numerous other collaborative relationships and partnerships that we've established. Here is a partial list of partners involved in key and fundamental ways in conceptualizing and implementing the our planned work: Mass Minority Contractors, City Life/Vida Urbana, Right to the City, Father's Uplift, Talbot-Norfolk-Triangle Neighbors United, Codman Square Neighborhood Council, Four Corners Main Street, Codman Square Health Center, Four Corners Action Coalition, Rebuilding Together Boston, JVS, Harvard Legal Services. These partnerships and many more not included in this CIP combine with wider efforts to improve the socioeconomic well-being of the community.

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

The **10-year** Mill 10 Plan continues to set the broader frame for our work, as it is a 10-year plan that the community developed in 2013, that is still very relevant today. There are many elements of that plan that CSNDC is leading the implementation of, as discussed in Sections 3 and 4, above. The 2016-2019 CSNDC Strategic Plan, which is also still very much relevant, and has been extended, through FY 2020 while we work on a new planning process, integrates the Mill 10 goals, as well as numerous other related and distinct goals, and provides a 3 year framework for implementation. The Strategic Plan has been divided into 6 priority areas that are aligned with and in keeping with, while extending the scope and vision of, the Mill 10 plan's "7 Big Ideas". Those priority areas include: Anti-Displacement and Affordable Housing (also a Mill 10 "Big Idea"); Sustainability (Environmental and Energy—also stemming from the Mill 10's "Big Idea" that led to the creation of our Eco-Innovation District); Health (implicit in all Mill 10 Working Groups, most particularly the Men of Color Working Group); Community Cohesion (a Mill 10 "Big Idea" (via the Community Café and Connectivity and Communication Working Group)); Equitable Economics (a Mill 10 "Big Idea") and Operational Excellence.

The Strategic Plan also a provides begins to set a frame for our Equity work, which has been furthered heightened as a result of the 2 year REDI Equity training we participated in, which has resulted in an equity lens that we are applying to all of our work, planning and decision making. The NWA FY 2020 Operating Plan sets forth and breaks down the annual targets related to the Mill 10 Plan, Strategic Plan, in keeping with the lenses, methodology and other work and plans that we've done, including the REDI and Leading for Impact Plans and work.

All the plans are direct outcomes of resident led visioning for Codman and align perfectly with the State's Sustainable Development Principle.

**Section 8. Financing strategy**

Codman Square NDC is requesting \$200,000 in CITC funding in FY 2020. We have a solid track record of achieving our goals, as outlined in the attached CIP Progress Report, as well as evidenced through the results of the July 2019 NeighborWorks America Program Review process. See more about how the NWA Program Review process relates to our track record in Section 9, below. A summary of Codman Square NDC's FY2020 updated CIP work as well as the anticipated cost to implement the activities of the updated CIP plan are outlined below. We are confident that with the additional funding we seek through the CITC along with the local and national financial resources that we are attracting, and as a result of our innovative, collaborative and comprehensive community development work, that we will



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be successful in raising adequate financial resources to achieve Plan priorities.

Codman Square NDC has experienced exponential growth over the past 20 years, from a 5-staff agency with a budget of about \$700,000 to an organization with over 25 staff and a budget in excess of \$3mill. We have been successful in sustaining this growth due to our experience in the real estate development area and our ability to effectively manage and grow our funding base. Each year we have been successful in meeting our fundraising goals and have attracted new resources at the local, state, national, corporate and private level due in large part to the innovative and broad-scale impactful work we are doing in transit oriented development, sustainability, community engagement and collaboration as set forth in the Mill 10 Plan and the 2016-2019 CSNDC Strategic Plan, as enhanced by our REDI (Equity) and Leading for Impact (LFI) plans and methodologies.

Over the last 5 years, we have used the CITC to leverage major new individual and corporate donors including CITC gifts from \$10K-50K. The availability of the CITC was a major factor in our ability to raise almost \$800,000 from Boston Medical Center, starting in 2017, to support our real estate development, community organizing, as well as a new Case Management capacity. As we become more adept at using the CITC to attract new major funders, we are confident that we can attract the full \$400,000 in CITC donations in 2020 to support implementation of our comprehensive initiatives.

While our core work remains development of affordable housing, over the last 3-5 years, Codman Square NDC has increasingly diversified its revenue base, though real estate developer fees remain an important source of funding. The main examples of funding base diversification are the Boston Medical Center multi-year grant of \$800,000 and the multi-year \$250,000 grant we received from the JPB Foundation, in partnership with The Nature Conservancy, to launch a Green Infrastructure Training and Certification Program. Additionally, we continue to receive significant grants from Enterprise Community Partners in support of our comprehensive community development work, including the Eco-Innovation District and OASIS on Ballou (\$400K over 5 years). The \$250,000 2 year grant received from the Prevention Institute Funding for our Men of Color Initiative continues to bear fruit.

In addition to all these efforts, what sets Codman Square NDC apart is our ability to carry out transformative and complex development projects which bring major new investment to the neighborhood and spur future public and private activity. Real estate activity is increasingly coordinated and integrally integrated into these other initiatives so that production of new affordable housing is one among several goals of our development projects. The Leading for Impact work we've done with Bridgespan has assisted us in more seamlessly connecting our lines of business, and work cross-departmentally, in a more strategic way. For example, over the last 3 years, the Real Estate and Organizing departments have worked seamlessly to support extremely low income residents of Walando Homes acquire their homes from bankruptcy. That award winning work to support resident leadership, working in conjunction with City Life/Vida Urbana, led to resident leaders changing the narrative, effectively presenting their case for pain and suffering due to slum conditions in the property in court, as well as in a front-page Globe story. A true public-private partnership composed of Greater Boston Legal Services, the City's ISD and DND, and numerous for profit legal firms on a pro bono basis,



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along with resident activism, led to a successful winning bid for the property. CSNDC’s real estate and organizing departments continue, to this day, a new level of strategic coordination around the Waldeck site of Walando Homes, CSNDC’s first supportive housing development. The departments have worked effectively to not only engaged residents in a health-outcomes focused design plan, but also have integrated residents into broader advocacy efforts, including the Homes for All, anti-displacement campaign. Residents are not only advising on design issues, but also working on legislative issues of import to them.

Through Codman Square NDC's operating budget which includes numerous funding sources from real estate developer fees, private and corporate grants and a solid fundraising track record over the years, the following base service activities will also be pursued as part of Mill 10 and 2016-2019 CSNDC Strategic Plan implementation:

*Summary of Codman Square NDC’s Draft FY 2019 Budget*

Total Revenue	\$3,049,748
Total Expenses	\$3,041,164
Net Income	\$ 8,584

Codman Square NDC has significant experience in garnering and managing State and federal resources (e.g., LIHTC, HOME, Sect 4 etc) for RE development and operating purpose.)

*Summary of CIP Implementation Budget 2020\**

Mill 10, Strategic Plan, LFI, REDI Projects	2019 Budget	\$ Raised as of Oct '19	Source
1. Eco-Innovation District/Green Infrastructure Train & Certification	\$275,000	\$150,000	JPB Foundation, NeighborWorks America, Enterprise
2. OASIS On Ballou Urban Agriculture	\$100,000	\$ 35,000	MDAR, Enterprise
3. Men of Color Wellbeing Initiative	\$ 75,000	\$ 20,000	Prevention Institute
4. Small Business Dev/Business Cooperative and Financial Literacy	\$110,000	\$ 90,000	City of Boston, MGCC, Capital One (grant pending)
5. Anti-Displacement Work/Keeping Codman Square Affordable	\$ 90,000	\$ 65,000	CSNDC Developer fees, United Way
6. Community Café	\$ 5,000	\$ 5,000	Two Community Cafes established strengthen with City of Boston small biz TA grant
7. Estate Planning	\$ 100,000	\$ 75,000	In-kind via pro bono Justice for All/Lawyers Clearinghouse attny
8. Rehab Lending	\$ 75,000	\$ 60,000	NWA Capital grant/CSNDC Developer fees
9. Health/Community Development	\$ 80,000	\$ 45,000	Build Health (pending)
<b>Subtotal</b>	<b>\$910,000</b>	<b>\$545,500</b>	



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Other CIP Needs (e.g., admin. staffing, consultant, materials, space rental, etc)	\$ 75,000	\$ 0	
Subtotal Other CIP Support Needs	\$ 75,000	\$ 0	
GRAND TOTAL ALL NEEDS	\$985,000	\$545,000	
REVENUE GAP	\$440,000	\$ Raised as of Oct '19	
Gap Filling Resources*	\$400,000	\$307,500	CITC Proceeds/Credit Utilization+
Additional FY 2019 Fundraising	\$ 40,000	\$90,000 in grant proposals pending	Various Sources grant pending*

+Requesting \$200,000 in Community Investment Tax Credits; ***As of 11/18/19 we've utilized 77% of our 2019 CITC allocation, and expect to utilize 100% by December 31, 2019.***

\*Sources Examples: Cummings Foundation, Barr Foundation, HUD, LARS Foundation, First Republic, Division of Banks, TD Bank, etc, all of whom have/projected to support our Mill 10, Strategic Planning, LFI and REDI work.

**Section 9. History, Track Record and Sustainable Development**

Codman Square NDC is a NeighborWorks America affiliate (NWA). NWA is a national community development intermediary that is Congressionally-chartered and works through partnerships, public and private, to drive change at the local level for individuals, families and communities. NWA provides capital and grants to its' affiliates in support of developing our low and moderate income communities. In order to remain in good standing with NWA, all of its affiliates undergo a rigorous program review process every 2-3 years.

A comprehensive organizational assessment of Codman Square NDC was conducted by the Organizational Assessment Division (OAD) of NeighborWorks America which concluded with an on-site visit the week of July 29, 2019. The primary objective of the review was to assist the organization in enhancing its performance and capacity by facilitating an evaluation of its operations and capacity in all lines of business and areas covered by the acronym PROMPT®: Production/Program Services, Resource and Financial Management, Organizational Management and Board Governance, Management, Planning and Technical Operating and Compliance Systems.

Interviews were held with the organization's board, staff and partners to explore recent accomplishments and future goals and challenges. The review included an analysis of the organization's internal management and service delivery systems, and an examination of financial records, production reports, and, selected policies, procedures and contracts. Additionally, a tour of Codman Square NDC properties and service areas were conducted. At the end of the on-site visit, a debriefing meeting was held with the members of the Codman Square NDC senior management team wherein key preliminary observations, findings, analysis, conclusions and recommendations were presented and discussed.



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A Program Review report summarizing the discussions and recommendations that emerged from the review process was produced. The Report indicated that CSNDC scored at the top level (“Exceeded”), in the Production/Program Services, Resource and Financial Management and Organizational Management and Board Governance areas, and scored the second highest level, (“Met”), in the Management, Planning and Technical Operating and Compliance Systems areas. This means that CSNDC is considered an “Exemplary” agency (the highest ranking), by NeighborWorks America.

Additionally, for over 35 years, Codman Square NDC’s comprehensive community development work has integrated affordable housing, economic development, and community organizing in ways that increasingly incorporate all of the State’s Sustainable Development Principles to create and expand economic opportunity for low and moderate income residents in Codman Square.

Codman Square NDC, particularly in the past 5 years, has become a community development leader in the sustainability arena as evidenced by the launching of several new initiatives since 2012 that are squarely focused on improving the environmental health and energy infrastructure of the community.

Over the last 5 or so years, we’ve seen signs of gentrification and displacement and fear that our neighborhood is transitioning into an increasingly unaffordable, high priced community. These alarming trends were the subject of two gentrification susceptibility studies of our service area that we commissioned in 2014 with the support of The Boston Foundation and the Boston University Urban Symposium. Our very recently completed 2016-2019 Strategic Plan was therefore laser focused on equity issues and equitable development.

Codman Square NDC’s equitable development focus integrates affordable housing development, equitable economic development and sustainability principles and practices, as well as community organizing and mobilization. Everything we do is viewed through the lens of: (a) How will it impact the environment? ; (b) How does the sustainability work align with economic development?; (c) Will the focus on sustainability impact our low and moderate income constituents’ financial well-being (their pocket books)? Will it impact their health?; (d) How do we insure equity and inclusion: that there is economic and health benefits for vulnerable populations such as men of color (MOC)? (d) How do we increase Minority Business Enterprise (MBE) utilization in all the work we do on the sustainability, real estate development, and economic development sides?; and (e) How do we stimulate locally-based micro-enterprises through this work? Viewing the work through these equity and sustainability lenses and answering these questions helps keep these sustainable development principles relevant to the population and community that we serve.

Examples of our sustainable development/equity and economic development focused work includes:

1. **OASIS on Ballou Urban Agriculture Project:** In 2015, we launched this 23,000 sq ft, former City vacant lot as an urban agriculture site training men of color (MOC) re-entry citizens as managers of all aspect of farm production. Since then, we’ve grown over 5,000 lbs of healthy, fresh, culturally appropriate produce. The MOC distribute this produce, low cost, to the community through



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various farmers markets, which they also manage.

2. **The Talbot Norfolk Triangle (TNT) Eco-Innovation District Initiative (EID):** We launched a pilot Green Infrastructure Training & Certification Program that over the next 3 years, will prepare 100+ MOC and small contractors for Green Infrastructure certification which might prioritize them for the 10,000+ pending City infrastructure capital projects that now, under EPS decree, have to be built in a more sustainable manner. The EID initiative is also focused on: Energy Retrofits (we've helped facilitate the retrofit of almost 50% of the 525 housing units in the TNT EID); Local/Clean Energy Generation (we completed solar panel installations and launched a Community Shared Solar Program on 400 housing units. EID and our RE department are also facilitating transit-oriented mixed used development (see Fairmount CDC Collaborative description immediately below for track record on this sustainability work).
3. **The Fairmount CDC Collaborative:** In collaboration with 2 other CDCs, we've developed over 1,000 affordable mixed-use transit oriented housing developments within a ½ mile radius of the new and existing stops on the Fairmount commuter rail line. Codman Square NDC's pipeline includes an additional 200 units over the next 3 years.
4. **The Fairmount Transit Coalition:** This is a ground-up grassroots coalition of over 12 groups that fought for and won 4 new stops on the Fairmount rail line, the last one of which was completed in Mattapan, this year.
5. **The Fairmount Greenway Task Force:** The Task Force is a collection of over 10 groups working to develop green and passive recreational spaces along the Fairmount line. Codman Square NDC's Oasis on Ballou Urban Agriculture site is one of the Fairmount Greenway sites.
6. **Health and Community Development:** We are increasingly working at the intersection of health and community development. Currently, we are partnering with Boston Medical Center (BMC— who is making an \$800,000 multi-year grant to CSNDC leveraged by CITC credits), the Codman Square Health Center (CSHC), the Boston Public Health Commission, Enterprise and others on the sustainable development of our Waldeck Street property, with an eye to incorporating design elements that will further the health of the supportive housing resident population. We also are leaders, with Health Resources in Action, on the "Fight All Flavors" campaign focused on the tobacco industry's use of predatory marketing tactics in Black, Latinx and LGBTQ communities to lure generations of young people into addiction. The campaign included a legislative push to treat menthol, mint and wintergreen like it already does other flavored tobacco products by restricting the sale to adult-only establishments and increasing the taxes on these flavored products. As a result, the Mass House of Representatives passed the bill to effect this. The bill is now pending in the Senate.

Codman Square NDC has served as a leader, catalyst and convener of all of the efforts described above. With our partners, we've leveraged well in excess of \$500 million in public and private funds to support this and other sustainability work. Codman Square NDC's history and track record clearly is and continues to be aligned with the Commonwealth of Massachusetts Sustainable Development Principles as further described below.

***Codman Square NDC's Alignment with State's Sustainable Development Principles***

As outlined immediately above, CSNDC is very aligned with the State's Sustainable Development



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Principles. The examples immediately above, encompass in one way or another, ALL ten of the Sustainable Development Principles. More examples of how our work aligns with the principles are outlined below.

*CSNDC's Alignment with Sustainable Development Principles Related to Concentrate Development & Mix Uses and Provide Transportation Choices/Expand Housing Opportunities*

Affordable housing is at the core of Codman Square NDC's work while economic development and community organizing are also part our specialty and strength. We have developed over 1,400 units of housing and are compactly building more dense mixed-used developments, (200+ units in the pipeline), adjacent to transit, with affordable housing units at the top and commercial real estate space at the bottom. This new transit-oriented-development (TOD) is creating energy efficient homes for over 1600 individuals in walking distance to Fairmount stations, thereby significantly reducing parking lots, while increasing bike storage space. We take an integrated approach to sustainable development by mobilizing our base which resulted in over \$200 mill in State Resources to improve transit service and build 4 new stops on the Fairmount Commuter Rail line in our service area.

*CSNDC's Alignment with Sustainable Development Principles Related to Advancing Equity & Mitigate and Adapt to Climate Change*

As highlighted throughout this CIP, equity, via our Race Equity Diversity and Inclusion Plan and lens, is a key priority for CSNDC. In 2019, we received a Kresge grant to mobilize community stakeholders to develop an equity-based climate resilience plan. The specific sustainability issues identified by stakeholders will be based on their needs, and they will be engaged in reviewing and commenting on existing public sustainability plans, all with an equity lens. Of particular interest to CSNDC is addressing the mental health and financial wellbeing of males of color through our Men of Color Initiative (MOC). We are doing that through various collaborations, including working with Boston Medical Center to renovate the Waldeck Street property, whose predominant 1-bedroom tenant population is primarily MOC struggling with tri-morbidities related to chronic health conditions, substance abuse and mental health issues. These residents have worked with our architect, and the health professionals, to articulate the design features for the rehab that they believe will improve their health. Also, in collaboration with the Local Initiative Support Corporation (LISC) we work via a multi-year \$100,000/year competitive national grant from the Prevention Institute to support socioeconomic wellbeing for Black and Latino men. Through these means we are striving for racial equity, particularly those who are re-entry citizens. Also see the Natural Resource/Jobs principle, below, for information on how we're advancing equity and mitigating climate impacts through the Green Infrastructure Training & Certification Program.

With the growing income divide in Boston as documented in the 2013 Federal Reserve Report and Codman Square NDC's growing concern about gentrification, rapidly increasing housing prices, and displacement in our service area as outlined in our "Mapping Neighborhood Change" gentrification susceptibility analysis completed by the Boston University Urban Symposium in 2014, we continue to





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advance our “Keeping Codman Square Affordable” (KCSA) campaign. Each of our agency departments are engaged in the KCSA campaign, a multi prong strategy to address the threat of displacement in a targeted and impactful way. We are pushing legislation and raising community voice on this issue.

*CSNDC’s Alignment with Sustainable Development Principles Related to Making Efficient Decisions*

Codman Square NDC has a history of convening local stakeholders to identify and address community development issues in accordance with smart growth and environmental stewardship. As outlined in Section 2, CSNDC consistently engages the community in directing and guiding its’ work. As a broker, convener, and catalyst, Codman Square NDC has since 1989, been at the forefront in coalescing the community to develop comprehensive community plans including the 1989-1990 Action Agenda, the 1999-2000 Millennium Plan, the 2013 Mill 10 Plan, and most recently the 2016-2019 Codman Square NDC Strategic Plan, our REDI and Leading for Impact plans. Each of these processes engaged hundreds of community residents and led to the creation and implementation of comprehensive community development strategies that integrate neighborhood scale sustainability, affordable transit-oriented housing; transit equity; local energy generation, green infrastructure jobs and development, energy retrofit and safety, community mobilization and advocacy; while also creating alternative economic models, like the Ballou Urban Agriculture project.

*CSNDC’s Alignment with Sustainable Development Principles Related to Protecting Land & Ecosystems*

Codman Square NDC and its partners, through the Fairmount Greenway Task Force, and otherwise, have transformed three vacant lots into public parks and community gardens/urban ag and planted 200 trees/shrubs over the past 18 months, via our MOC Arborist Training Program. The Eco-Innovation District (EID) emerged in 2013 out of residents’ vision through the Mill 10 Plan to develop a sustainable, healthy urban “ecosystem” that serves area residents, improves their quality of life, and promotes health and wellness. Subsequently, new green space and public realm infrastructure projects such as rain gardens, street trees, green bus stop roofs, destination signage and traffic calming measures have been enhancing air quality and public safety, improving the built environment and public health, and creating new opportunities for recreation, civic engagement, and outdoor activity.

*CSNDC’s Alignment with Sustainable Development Principles Related to Wise Natural Resource Use Jobs & Business Opportunities*

We promote ecological design in several ways: through our RE development work, as well as through the work of our Eco-Innovation District (EID) initiative. Our EID Director works closely with our RE Director to support designing all of our RE projects to the highest certifiable levels of LEED or HERS standards. We also piloted a Green Infrastructure Training & Certification program in 2019. CSNDC staff “graduated” from the National Green Infrastructure Certification Program (NGICP) “Train the Trainer” class in summer 2019, and are now able to offer the training and certification to local MOCs, contractors and others. Given that the City of Boston is now, under EPA decree to complete the 10,000+ capital infrastructure projects in its’ pipeline in a more environmentally sustainable way, offering Green



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Infrastructure Training & Certification will not only promote more ecologically positive infrastructure development, but also advance equity through training MOC and prepare them for employment on literally 10,000+ capital jobs the City has planned in the coming decade. This work also positions CSNDC, as an agency, to establish social enterprise around the training & certification program.

Part of our KCSA campaign is the strategic approach to the creation of assets and wealth among neighborhood stakeholders. In 2019, our Economic Development department focused on new asset building strategies in two ways: Through the launch of the Family Self-Sufficiency Program, in which we will work with Compass Working Capital and Winn Residential to track tenants towards economic success via escrowing and matching any rent increases they incur as their income increases. We will also expand our financial counseling services to residents of CSNDC-developed housing who are in jeopardy of being evicted due to financial reasons, in an effort to prevent eviction. Our small business development program, Dot-Biz, had another successful year focusing on strengthening the financial position of local and aspiring merchants by providing them with education and technical assistance to ensure long-term sustainability, job creation, and growth. To further bolster the small businesses in our community, we have begun to rebrand Codman Square as the Caribbean Corridor bringing attention to the rich diversity of Afro-Caribbean vendors and the array of services they provide to the Codman Square community. Two examples of success stories from the Dot-Biz program and our small business technical assistance include the launches of Codman Square's *second* Community Café known as the Juice & Jazz and the Next Step Soul Food Café. Both businesses are growing fixtures in the community as they provide healthier food options and create jobs respectively. Owners of both businesses received extensive support, education, and training from CSNDC's small business programs.

**Attachments to Updated CIP**

Attached to this proposal are excerpts from the Millennium 10 Plan, Codman Square NDC's 2016-2019 Strategic Plan, the 2019 Leading for Impact Plan Seamless Integration/Housing First Plan and the 2018 REDI Plan