

2021 – 2023

## **Community Investment Plan**

### **Metro West Collaborative Development, Inc.**

Metro West Collaborative Development, Inc. is a community development corporation that serves an approximately 22-town area comprising the West Metro HOME Consortium and surrounding communities (see Attachment A). This plan does not deviate significantly from our 2014-2019 plan.

## **What We Believe**

Several themes serve as the backdrop to this plan:

- 1) Our past and future successes hinge on relationships both deep and wide and with those who are now, and those will become, key stakeholders.
- 2) The organization has grown steadily in the past five years, building upon successful implementation of a few core programs. This growth and commitment to programs with strong content and outcomes will continue.
- 3) The organization will continue to invest in its existing assets (projects, programs and people) while creating opportunities for new ones.
- 4) All of our work is interrelated: building housing, supporting neighborhood centers and small businesses, helping people find housing, work and the services they need. We are strengthening families and communities.
- 5) The spirit of collaboration and maximizing resources by sharing burdens and opportunities is essential in all facets of our work.

## **Current Environment**

While Covid-19 has turned everything upside down, and the future is uncertain, the work of Metro West Collaborative Development has never been more important and neither has our role in the community as a vehicle for delivering vital housing services. Metro West CD is strong and we are looking forward to a period of growth despite a very expensive and politically difficult environment within which to work. Key opportunities in our region include:

- 1) Opportunity: Of the 22 towns in our target area 15 fall below the state's 10% affordable housing goal, requiring over 4,000 units simply to meet the 10% goal.
- 2) CPA funds: 20 of the 22 towns in our target area have CPA funds with a total of more than \$25 million available annually. Even if only the minimum of 10% is used for affordable housing production, that provides over \$2.5 million for potential projects.
- 3) Strong advocates: Many of the 22 towns in our target area have strong Housing Trusts or Housing Partnerships with positive track records advocating for affordable housing in their towns. Our work will focus on building upon their success.
- 4) All 22 towns in our target area are "High Opportunity" areas, which suggests that residents of these towns will have access to good schools, jobs and transportation.



## **Section 1: Community or constituencies to be served by the organization**

Metro West CD works in an approximately 22-town geographic area (the precise number of towns can vary slightly from year to year). They are primarily suburban communities. Collectively these communities are home to approximately 35,000 low and very-low income households but have only 19,000 affordable housing units leaving nearly 16,000 households at risk of homelessness and severe economic strain. To simply meet the 10% Chapter 40B affordable housing goal these communities would need to add about 4,000 units. Our goal is to help organize low and moderate income families and other housing advocates to strive to reach this 10% goal.

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

Success of our Plan is ultimately measured in affordable housing units created. Each community that we work with identifies their own affordable housing development goals and potential projects. Metro West CD serves as the facilitator, vehicle, trainer and coach that helps communities accomplish their goals. Our work is informed regularly by outreach to low and moderate income individuals through surveys, meetings and workshops and through regular meetings with community stakeholders like Housing Trusts, Planning Boards, Community Preservation Committees and Boards of Selectmen. Below is a list of some of the outreach activities engaged in over the past twelve months. Collectively, these activities involved over 300 people.

- Metro West CD Tenant survey Fall 2019
- Ready Renter Annual Survey Fall 2019
- Planning meetings with members of the Belmont Housing Trust, Lexington Housing Partnership, Natick Housing Trust, Watertown Housing Partnership and WATCH CDC.
- Sole CHDO representative to the West Metro HOME Consortium
- Senior Housing Seminars in Watertown, Lincoln, Hudson, Stow and Lexington Fall 2019

## **Section 3: Plan goals**

Goal #1: To complete construction of 74 units of affordable housing and obtain permitting for another 100 units.

Goal #2: To assist 500+ low and moderate income households annually in their search for stable, safe and decent housing.

Goal #3: To support five community-based affordable housing advocacy efforts resulting in new or larger projects or programs that expand affordable housing opportunities.

Deed-restricted affordable housing is not only a potential life changer for low and moderate income households, but it becomes a resource for the entire community. It becomes a place that people can know is there if they ever need it. It creates stable communities where children can thrive in school and employees can more confidently head out to work in the morning. It creates homes where seniors don't have to fear being kicked out. Our affordable housing is also well



maintained and is an asset to the neighborhood. Quality affordable housing can be a catalyst for additional investments in a neighborhood.

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

Metro West CD provides programs in three core areas:

- 1) Real Estate Development
- 2) Housing Services
- 3) Community Organizing

### Real Estate Development Background

Metro West CD has developed four ownership units and 69 rental units. Glen Brook Way Phase I (Medway), which broke ground in August 2020, will add 48 more rental units to the list of accomplishments. A Phase II is awaiting an allocation of DHCD subsidies and we hope will break ground in 2022 adding 44 senior rental units to the Metro West CD portfolio. Metro West CD is supported in property management by two third-party property management firms, Maloney Properties and CAN Management.

Metro West CD staff are actively exploring project opportunities in many of the Metro West communities. This work is largely done in consultation with planning staff and/or housing advocates within each community.

### Real Estate Development - The next five years:

Metro West CD has recently had several important wins:

- 1) The construction completion of 40 River St., Norwell: 18 senior units
- 2) The construction start of the Glen Brook Way, Medway: 48 family units
- 3) The construction completion of 236 Auburn St., Newton: 8 family units

Together these projects form the foundation of Metro West CD's expansion of its real estate development activities. In 2013 Metro West CD had set an ambitious goal of building 100 units of housing by the end of 2018. While they might not all be built within the 5-year timeframe the goal was largely met:

St. Joseph Hall – senior rental: 25 units. Completed 2014.

40 River St. – senior rental: 18 units. Completed November 2019

236 Auburn St. – family rental: 8 units. Completed March 2020

Glen Brook Way – family rental: 48 units. Completion expected 2021

Total: 99 units

The next five years envisions a similar level of success utilizing similar strategies.

<b>Goal: To complete construction of 48 units of affordable housing and obtain permitting and/or financing for another 100 units.</b>
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Specific Next Steps for 2021-2022
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| <ul style="list-style-type: none"><li>• Launch and complete the construction of Glen Brook Way, Medway, 48 rental units</li></ul> |
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- Obtain subsidies and other financing for Glen Brook Way Phase II, 44 rental units for seniors and begin construction in 2022.
- Provide regular support to the Housing Partnerships/Trusts throughout the region as requested and as time allows.
- Pursue leads on projects in: Hudson, Natick, Watertown, Waltham and other communities as they emerge.
- Respond to municipal RFPs as they are announced.
- Obtain site-control of a new project every 18-24 months.

### Housing Services Background

Metro West CD currently provides three housing services:

- 1) **Regional Ready Renter Program** – Through this program, low and moderate income tenants can sign up for on-going referrals to affordable housing opportunities. Approximately 3,000 households are on the current list, up from 150 in 2013. The program was designed to meet DHCD Affirmative Fair Housing Marketing requirements and therefore units filled from this program are eligible for listing on the Subsidized Housing Inventory.
- 2) **Affirmative Marketing and Monitoring** – These services are available to towns and developers who seek assistance meeting the regulatory requirements for affordable housing through Chapter 40B, 40R or local inclusionary zoning ordinances. We are currently working on projects in Dedham, Stoughton, Medford, and Scituate. We are also the consultant to a regional housing consortium that includes the towns of Hudson, Bolton, Boxborough, Harvard, Lancaster, Stow, Littleton and Devens Enterprise Committee. Metro West CD is a MassHousing approved 40B Monitoring Agent. This work creates relationships with municipal staff and real estate developers and supports our mission of preserving and promoting affordable housing. We are proud to be one of the stewards of the growing inventory of affordable housing in the Commonwealth. A full list of our Affirmative Marketing and Monitoring work is in Attachment B.
- 3) **Emergency Rental Assistance** – in response to the pandemic, Metro West CD authored and crowd-sourced a collection of program administration documents (application, guidelines, agreement) that have been adopted by many communities throughout the state. Metro West CD has been hired by eight municipalities and foundations to implement programs on their behalf. We are currently supporting nearly 400 households and will disburse over \$4 million to landlords.

### Housing Services - The next five years:

While significant changes are not anticipated in Metro West CD Housing Services we have the opportunity to triple our outcomes over the next 3-5 years as we expand into more communities.

#### **Housing Services Goals:**

- 1) Respond to Covid-19 pandemic with Emergency Housing Assistance programming as opportunities emerge.
- 2) Regional Ready Renter program will serve 3000+ households annually.
- 3) Provide more in depth housing search assistance to approximately 100 households annually through our weekly housing clinics



- 4) Affirmative Marketing and Monitoring – continue to provide this service to 1-3 new projects per year

#### Specific next steps for 2021-2022

- Work with 5-10 municipalities to address Covid-19 related emergency housing services.
- Continue Ready Renter marketing and wait list management. Implement improved on-line capacity via new website
- Conduct weekly housing clinics to provide households for more in depth support
- Reach out to 1-2 new municipality annually to “pitch” monitoring services

### Community Organizing – New Focus

While Metro West CD has long supported local housing advocates with technical assistance and advice we have not had sufficient resources to provide more in-depth “campaign” support, such as when a community is putting an affordable housing project, policy or program up for consideration at Town Meeting. Over the next five years Metro West CD seeks to more concretely assist communities with this type of work.

#### **Potential Community Organizing Goals:**

- 1) Organize and support campaigns to loosen zoning restrictions that will encourage multi-family residential development.
- 2) Develop community engagement strategies that effectively involve People of Color, immigrants and other groups traditionally under-represented in community planning ie: during a Housing Production Planning process.
- 3) Support campaigns to raise revenues that are targeted for affordable housing production such as CPA, linkage or community benefits negotiations.

#### Specific next steps for 2021-2022

- Identify and obtain resources for this work.
- Develop staffing plan
- Consult with potential community partners and select first campaigns to support.
- Launch campaign/efforts in 2022

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

The Metro West CD Board of Directors annually establishes a set of organizational goals and evaluates them at the end of the year to measure whether the goals were met. The above goals will be measured by:

- Completion of the construction of 48 units in Medway
- Financing secured for Phase II, 44 units in Medway.
- Purchase and Sale Agreements signed for 2-4 additional properties
- Maintaining the Ready Renter Program and providing support to 3000+ households, as evidenced by applications and annual surveys and interviews to measure outcomes.

- Launching of community organizing effort as evidenced by staffing in place, campaigns identified and launched.
- New policies or programs that lead to the expansion of affordable housing opportunities in 2-3 communities per year, starting in 2022.

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

All of Metro West CD's work is done in collaboration with local leadership. The form of leadership may vary but generally includes Housing Trusts, Planning Boards, local Community Groups, Community Preservation Committees and Boards of Selectmen. In addition, Metro West CD has hundreds of donors and program participants who contribute to the public discourse of affordable housing in their communities.

Known collaborators in 202-22 will be:

Medway Affordable Housing Trust

Belmont Housing Trust

Natick Affordable Housing Trust and Family Promise of Natick

WATCH CDC

Watertown Housing Partnership

Needham Affordable Housing Trust

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

The production of affordable housing is a component of every master plan or community plan in the communities within which we work, although not all communities have master plans. When considering work in a community we always begin with what planning documents are available on the municipal website. It is a core component of our work that we support local goals and strategies and thus always seek to be consistent with local plans.

## **Section 8: The financing strategy**

Metro West CD has primarily relied on developer fees for its survival. Although these fees will continue to be the largest single source of revenue, we have been expanding our monitoring and consulting contracts which provide sufficient funds to cover one staff person. Metro West CD has also been utilizing approximately \$50,000 in CITC allocation annually. 2020 was our most successful fundraising year ever having raised over \$120,000 in private donations.

## **Section 9: History, track record and sustainable development**

Metro West CD has a 30-year history of working with housing advocates in numerous metro west communities to accomplish their housing goals. We have successfully utilized the Community Investment Tax Credit to grow new resources and therefore grow new initiatives (such as the Belmont Housing Production Plan) and expand current ones (such as the Ready Renter Program).



The recent completion of an 18 unit project in Norwell, 8 units in Newton and the two phases in Medway exemplify the skills Metro West CD brings to the community development world as well as our commitment to the Commonwealth's Sustainable Development Principles:

Norwell – This 18-unit rental development for seniors was completed in November 2019 and had a total development cost of \$5.6 million. The project accomplished several Sustainable Development principles:

- 1) Concentrate development – this site is much more dense than its surrounding uses and is close to the town center.
- 2) Advances equity – it locates affordable housing in a community that is well below the Chapter 40B 10% goal.
- 3) Protects land and ecosystems – over 50% of the site is reserved for open space
- 4) Expands housing opportunities – the project creates much needed wheelchair accessible units and units for households with a mix of incomes: 30% of AMI to 100% of AMI

Newton - This 8-unit development conducted with fellow non-profit CAN-DO was completed in March 2020 and had a total development cost of \$4.1 million. The project accomplished several Sustainable Development principles:

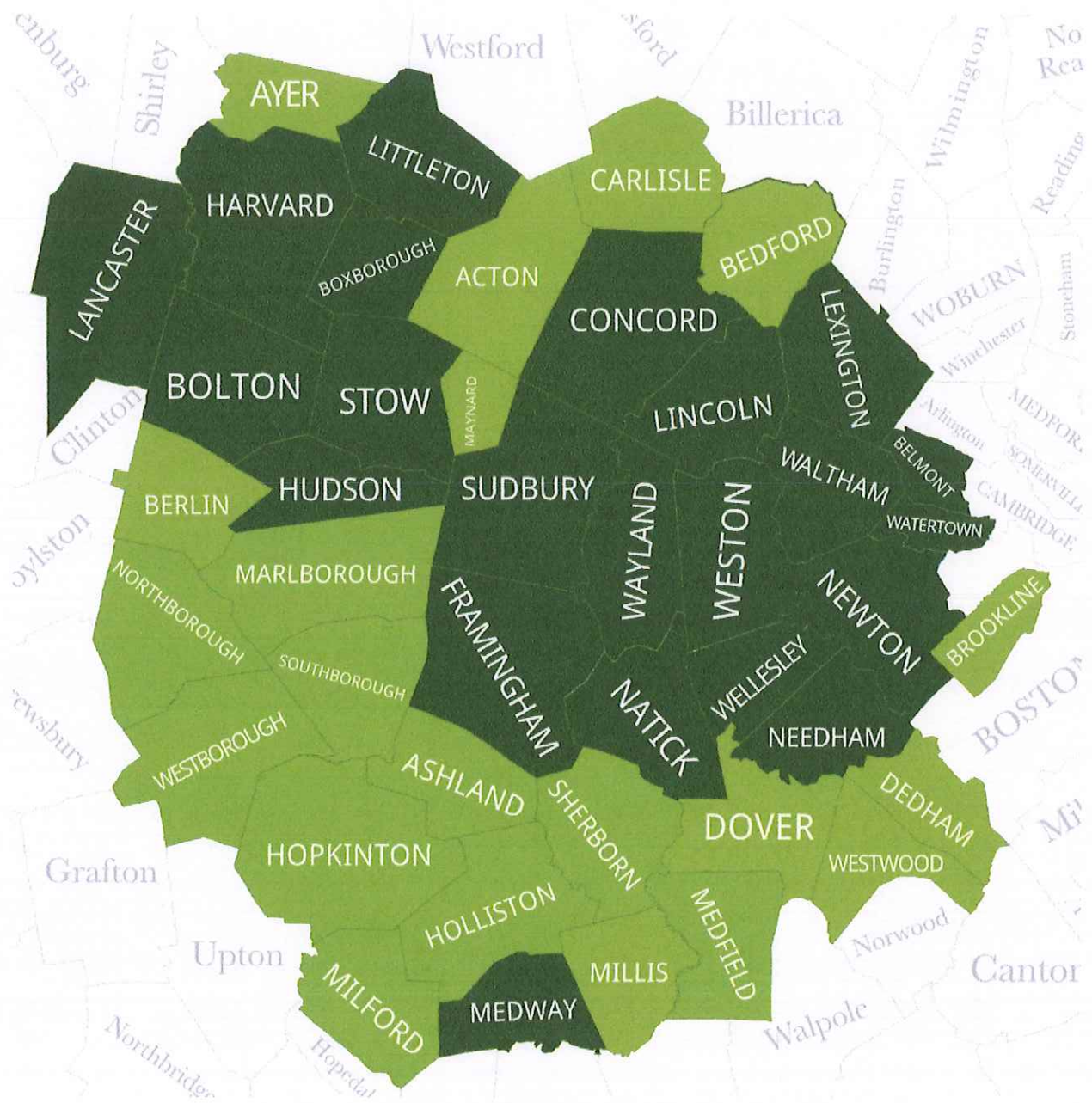
- 1) Concentrate development – this site is much more dense than its surrounding uses.
- 2) Advances equity – it locates affordable housing in a community that is well below the Chapter 40B 10% goal.
- 3) Expands housing opportunities – the project creates much needed wheelchair accessible units and units for households with a mix of incomes: 30% of AMI to 80% of AMI

Medway - This two-phase project broke ground on phase one this summer and will result in 48 rental units for families and 44 units for seniors. The municipality has committed \$2 million to the whole project. Total development cost of Phase I is approximately \$19 million. The project accomplishes several Sustainable Development principles:

- 1) Concentrate development – this site is much more dense than its surrounding uses.
- 2) Advances equity – it locates affordable housing in a community that is well below the Chapter 40B 10% goal.
- 3) Protects land and ecosystems – over 40% of the site will be reserved for open space
- 4) Expands housing opportunities – the project will create much needed wheelchair accessible units and units for households with a mix of incomes: 30% of AMI to 60% of AMI

Attachment A

Map of Metro West CD target area. Dark green includes 22 primary target area communities. Light green includes 22 secondary target area communities.





Attachment B

Affirmative Marketing, Lottery and/or Monitoring Projects

Project	Town	# of Affordable Units	Type	Year begun	Active?
Repton Place	Watertown	28	Owner	2009	yes
Riverbank Lofts	Watertown	7	Owner	2009	yes
Castle Courtyard and Admiral Cove	Natick	6	Owner	2010	No
1060 Belmont	Watertown	18	Rental	2010	Yes
Charles River Towers	Watertown	1	Rental	2010	Yes
Campion Estates	North Andover	7	Owner	2011	Yes
Nally Estates	Watertown	2	Rental	2011	Yes
Charlesbank Apts.	Watertown	4	Rental	2012	Yes
30 Haven	Reading	11	Rental	2013	Yes
Goddard Highlands	Stoughton	26	Owner	2013	Yes
Rose Landing	Danvers	18	Owner	2013	Yes
Riverbend Apts.	Watertown	17	Rental	2013	Yes
Elm Residences	Bridgewater	5	Owner	2014	Yes
St. Joseph Hall	Watertown	25	Rental	2014	Yes
Magic 5-town	Hudson (B,B,L & S)	many	Both	2014	Yes
Duxbury Woods	Duxbury	10	Owner	2015	Yes
	Boxborough	1	Owner	2015	Yes
Greendale Village	Needham	4	Owner	2015	Yes
Watertown Sq. Apts.	Watertown	13	Rental	2015	Yes
Warner Woods	Concord	16	Rental	2015	Yes
Simrah Gardens	Hudson	40	Rental	2015	Yes
Villages at Stow	Stow	24	Owner	2016	Yes
Woodland Meadows	Southborough	4	Owner	2016	Yes
Warren Ave.	Weston	5	Rental	2016	No
WAHFI	Weston	6	Rental	2016	Yes
The Drake	Stoughton	4	Rental	2016	Yes
Fairview Apts.	Lexington	4	Rental	2016	Yes
Taft Ave.	Newton	2	Rental	2016	Yes
Cambria Rd.	Newton	2	Rental	2017	Yes
Myrtle Village	Newton	7	Rental	2017	Yes
350 Washington	Dedham	3	Rental	2017	Yes
Greenbush Station	Scituate	4	Rental	2017	Yes
	Devens	44	both	2017	Yes
321 Washington	Westwood	2	Rental	2017	Yes
The Sphere	Medford	4	Rental	2017	Yes
Busa Farm	Lexington	6	Rental	2018	Yes
Herring Brook Hill	Norwell	18	Rental	2019	Yes

236 Auburn St.	Newton	8	Rental	2019	No
467 Main St.	Reading	8	Rental	2020	Yes
70 Boston St.	Salem	5	Rental	2020	Yes
400 Langley	Newton	4	Rental	2020	Yes
The Fields	Sherborn	8	Owner	2020	Yes
Fieldstone Way	Wellesley	11	Owner	2020	Yes