

South Boston Neighborhood Development Corporation

COMMUNITY INVESTMENT PLAN January 1, 2020-December 31, 2022 November 22, 2019

Introduction

The South Boston Community Investment Plan (CIP) 2020 continues South Boston NDC's 35 year core mission to increase the supply of affordable housing in the neighborhood. The plan also expands on other mission goals to address neighborhood challenges such as substance abuse, economic development, and asset-building/quality of life improvements relating to issues affecting resident health and the livability of the South Boston neighborhood.

Since 1983, SBNDP has developed over 200 units of affordable housing and revitalized vacant and blighted properties in South Boston. Until 2016, most of the housing development and preservation that was completed by South Boston NDC, was built before 2002. Anticipating the completion of the Big Dig in the late 1990's, real estate prices began to rapidly increase in South Boston. Local political opposition to affordable housing, combined with high prices, made it extremely challenging to develop new affordable housing in our dense urban neighborhood. With the completion of Patriot Homes for Veterans in 2016, political support shifted in favor of affordable housing. SBNDP received community and City approval to develop two new developments, 206 West Broadway and O'Connor Way Senior Housing. These recent developments were successful, in part, because CIP leveraged important financial contributions that supported staffing during pre-development and construction.

Market-rate real estate development in South Boston is changing the neighborhood in complex and lasting ways. New development has resulted in a growing income disparity between wealthier newcomers and low income, long-term residents, contributing to the social problems exacerbated by social isolation. Housing demands are projected to continue to increase in South Boston, as well as the surrounding neighborhoods, resulting in the continued displacement of low and moderate income residents. As a result, the lowest income residents are increasingly isolated in the three public housing developments in South Boston, and moderate and working class residents have been forced to move as rents have increased.

In addition to the challenges of the housing market, South Boston faces social challenges, in particular, addiction and its related problems. South Boston faces severe issues surrounding heroin, opioid, and alcohol addiction, with substance misuse mortality rates at 45.9 per 100,000, compared to 32.6 for the City of Boston. Rates of binge drinking were 39.8% in South Boston, compared to 24.8% city-wide.¹

The South Boston Waterfront has emerged as a major economic generator in the city, increasing employment opportunities in the hospitality industry, financial, legal, and biotech areas. The development of the Waterfront is also generating Inclusionary Development Program and linkage funds that have become available to support South Boston NDC's affordable housing developments. SBNDP is working to leverage all resources to benefit low and moderate income residents.

South Boston NDC is a member of a strong neighborhood network of service providers and is committed to continuing to partner with other organizations to address the needs of residents and take advantage of the opportunities that the development of the neighborhood brings. The Community Investment Tax Credit is a unique and valuable tool to leverage the resources required to address community needs.

¹ Boston Public Health Commission "Health of Boston 2016-2017"

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

The Plan Area

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

SBNDNC's constituency has typically been made up of low to moderate income populations, characterized by 60 to 80% AMI, and primarily in the St. Vincent's neighborhood. Table 2 (see Appendix) illustrates how the census tracts in the St. Vincent's neighborhood compared to all census tracts in South Boston, including the Seaport (Boston Waterfront). Of note are considerably higher rates of individuals living in poverty, households where at least one member has a disability, and households accessing SNAP benefits. The St. Vincent's neighborhood is also home to significantly more people of color than other parts of South Boston.

Mission

SBNDNC's primary mission includes the following goals and actions:

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

Section 2: Involvement of Community Residents and Stakeholders

I. Development of the Community Investment Plan

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

Development and implementation of our original CIP involved the following stakeholders:

1. South Boston NDC Board and membership: The SBNDNC board is comprised of 12 seats for local residents and stakeholders, including low income tenants of SBNDNC and representatives of nonprofits serving low income residents. Through their professional expertise and personal experiences, board members represent the following constituencies: low and moderate income households, people in recovery from addiction, single parents, immigrants, the homeless, English language learners, students, Veterans, the elderly, and youth. Board

members meet monthly and also play an active role in the community, serving on other boards and attending community meetings. For example, members of the board serve on City of Boston community advisory groups that are established to review large scale real estate developments and to make changes to the Zoning Code. (See Appendix for a current list of board members and their affiliations.) In this way, residents and stakeholders have been engaged in the development of the plan through monthly SBNDC board meetings.

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

SBANP monthly meetings provide an opportunity for staff of all the nonprofit organizations to collaborate on a regular basis and to be familiar with each other's programs. In 2016, SBNDC's Executive Director and 2 board members were instrumental in amending the SBANP bylaws to increase the relevance of the association to its members and the populations they serve. CIP updates since 2017 were prepared in response to recurring issues discussed at the SBANP meetings.

3. South Boston Collaborative Advisory Network (SBCAN): Results of the 2013 Quality of Life community survey, administered by SBCAN with advisement from SBNDC, were instrumental in refining the original South Boston CIP. At that time, residents identified access to affordable housing, clean environments supportive of healthy lifestyles and behaviors, and good jobs and a strong economy as the most important factors of a healthy community. These issues are at the core of SBNDC's mission, and serve as the foundation for our original plan goals.

4. Outreach done by LISC AmeriCorps member:

South Boston NDC's 2013-2014 LISC AmeriCorps member met with range of community leaders and residents in South Boston for the purpose of developing partnerships, engaging community members, gathering input, and including stakeholders in the development of the CIP.

2020 CIP Update

Since the original CIP was developed, SBNDC's rental portfolio has grown by 155%, which greatly expanded the number of tenants with whom we have direct contact and as a result the diversity of backgrounds and experiences represented among our tenants. SBNDC's property management functions are entirely in-house and our office staff are deeply familiar with the South Boston neighborhood (three of the five are South Boston natives; our Executive Director has lived here for over 30 years). This arrangement provides extensive and ongoing insight into the challenges our tenants face, which in turn informs our programming and services. For example, we became increasingly aware of rising utility costs for some of our tenants, which helped motivate energy assessments and related improvements for the buildings most in need of attention, as well as outreach to help tenants access reduced utility rates and fuel assistance.

In 2018, SBANP identified the effects of climate change on South Boston as a stated focus area. In response, SBNDC hired a Climate Action Intern to coordinate climate-action projects across SBANP member organizations and other community groups, and to strengthen SBNDC's capacity to respond to the impacts of climate change. The Climate Action Intern's work involved deploying climate-literacy games and activities at local summer youth programs, engaging Farmers Market visitors on a range of climate change-related topics, and initiating waste-reduction and energy efficiency projects for SBNDC residences.

Within five months, SBNDC marked the following major achievements:

- dozens of hours spent on relationship-building and stakeholder outreach;
- collaborated with 7 youth programs and engaged approx. 60 youth;
- engaged ~35 Farmers Market shoppers each week;
- collected ~50 survey responses to identify project topics most relevant to residents;

- created 2 additional summer employment positions for South Boston teens;
- launched the Climate Action Partners initiative to facilitate continued community involvement;
- completed energy audits for 20% of our portfolio through the Mass Save and LEAN and;
- rolled out recycling programs for more than 95 residents at SBNDC’s five largest buildings.

Our Climate Action initiative renewed SBNDC’s efforts to build and strengthen relationships through stakeholder interviews, community engagement exercises deployed online and at community events, and collaborative partnerships with local social services programs, and by empowering SBNDC residents to help us meet organizational climate action goals.

In September, SBNDC hired a Community Engagement Director, and the Climate Action work was folded into the broader community engagement scope of the new position. With the creation of this new role, we made a strategic decision to seek out direct participation from individual community members in the development, implementation and monitoring of our work. These efforts have included relationship-building and engagement efforts such as attending neighborhood association meetings; raising awareness of SBNDC’s projects and mission across a wider range of stakeholders; educating community members about the importance of affordable housing in the South Boston context; and mobilizing supporters to support SBNDC’s emerging advocacy efforts.

An early indicator of the impact of our community engagement work is the highly successful public-comment campaign we organized around a development proposal in South Boston. In October 2018, we had collected just under 60 public comment letters in support of affordable housing at the project, with about 60% of the letters written by community members residing outside of SBNDC’s portfolio. One year later, responding to a proposal to eliminate housing plans altogether at the same project, we launched an advocacy effort asking the city and developers to include housing and increase the percentage of on-site affordability for seniors. Through traditional in-person tabling and outreach techniques, as well as a digital “click to comment” strategy in our newsletter and social media platforms, we collected over 150 letters supporting our stance. Ninety-percent of these letters were written by new supporters, and 80% were submitted by non-SBNDC residents. As a direct result of our efforts to identify and cultivate champions of affordable housing in South Boston, the number of community members who spoke publicly in support of affordable housing at a recent meeting was double the number who had commented at earlier meetings. Additionally, we were able to leverage this momentum to secure political support for housing at the site.

II. Implementation And Monitoring

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

1. South Boston NDC Board and membership: The SBNDC board and membership will continue to monitor implementation of the CIP through monthly board meetings and the SBNDC Annual membership meeting, which is typically attended by 35-40 members. We rely on South Boston residents to hold us accountable to our mission, and to help ensure we are responding to the issues most important to community stakeholders. Under our new community engagement initiative, we will provide additional opportunities for members (SBNDC residents and supporters) to provide feedback, ask questions, and otherwise weigh-in on the direction of the organization. We expect this process will require a robust education campaign upfront, as a long history of opposition to affordable housing in this neighborhood and other factors impeded widespread community support enjoyed by many other CDCs in the Greater Boston region.

2. South Boston Association of Non Profits (SBANP): SBANP provides a platform for SBNDC to reach a broad range of residents and develop collaborative partnerships with other organizations. Our staff and board members will continue to play a governance role in the SBANP. SBNDC is the lead agency coordinating the

climate action work which SBANP voted to pursue. SBANP members will continue to guide the implementation of this work in particular through ongoing planning and participation in related projects. Many SBANP members also serve client populations for whom housing affordability is a pressing issue. Maintaining close relationships with these organizations and soliciting their input will improve the efficacy of our advocacy work and implementation of our plans to expand the number of South Boston residents utilizing our housing services.

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

We have found that residents who express opposition to our position on affordable housing often reveal valuable insights into ways SBNDC could improve our communication and outreach efforts. For example, interactions with residents who were opposed to a new housing development illustrated information gaps in the way that “affordability” was described by the developer, and SBNDC was able to step in and clarify. Similarly, expressed disbelief among community members that South Boston residents benefit directly from SBNDC housing indicated a need for the organization to better publicize when we are able to protect Southie natives from being displaced. These interactions also create opportunities to correct misinformation and misunderstanding, and ideally to position SBNDC to shift some opposers into allies.

Perhaps the bigger challenge is engaging community members who do not perceive SBNDC’s work to be relevant to their own lives, either because they do not benefit directly from one of our program areas, they aren’t aware of the breadth of programs we operate, or both. For example, those who know that we work in the affordable housing space often are not aware that we also operate the Farmers Market and maintain the street trees on Broadway, or that we’re responsible for South Boston Street Festival. We believe that making deliberate efforts to consistently promote our various programs and initiatives as the work of SBNDC will help a broader range of community members see something in our work that relates to themselves or their family and friends.

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

Community Meetings: All of the physical development activities in the CIP have involved and will continue to involve public meetings and comment periods. SBNDC will coordinate community meetings that are open to the public as part of all property purchases and development activities. During the planning and development of affordable housing projects, SBNDC regularly meets with abutters, elected officials, and neighborhood associations. SBNDC held more than 12 community meetings since 2014 regarding the approvals for 2 new housing developments, 206 West and O’Connor Way. Both projects received zoning approval from the ZBA.

Section 3: Plan Goals

- I. Increase the supply of affordable housing, including supportive housing for those recovering from substance abuse.**
- **Benefit for low and moderate income households:** Low and moderate income households will benefit from increased affordable housing because they will be less rent-burdened and will not face displacement from their homes. Improved access to treatment and a stable housing situation will facilitate recovery for low and moderate income addicts.

- Benefit for the entire community: The neighborhood will benefit from the redevelopment and occupation of blighted sites. Increased substance abuse treatment through supportive housing will also benefit family members and all residents by reducing crime and family stress. In addition, an increase in the supply of affordable housing will help maintain the neighborhood’s economic diversity and prevent the income disparity from increasing.

II. Focus on economic development through small business assistance.

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

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

- Benefit for low and moderate income households: Increasing the urban tree canopy and green spaces and vegetable gardens will impact health issues such as asthma and obesity that disproportionately affect low and moderate income people. The gardening programs and farmers market provide healthy food and nutrition information for the low and moderate income people and employ local youth. Vulnerable populations face devastating losses during and in the aftermath of natural disasters and other traumatic events which create significant community upheaval. Building the capacity of low and moderate income households to prepare for and respond to the effects of climate change will improve their ability to absorb life-altering shocks caused by extreme weather and other catastrophes.
- Benefit for the entire community: Providing more green space, access to fresh produce and nutrition education in urban neighborhoods has many environmental, social, health, and economic benefits that improve the quality of life for all residents. Increased understanding about the neighborhood-level effects of climate change in South Boston will strengthen the community’s ability to respond to and bounce back from the impacts of climate change, other catastrophes, and social changes.

Section 4: Activities to be Undertaken

I. Affordable Housing Activities

1. Pre-Development Work:

Activity: Many activities must be completed before development, such as planning, research and identification of potential sites, funding analysis, and community organizing and outreach. An assessment of potential sites for development was completed in July 2014. Three potential opportunities were identified: 206 West Broadway, a city-owned vacant parcel, 5 O’Connor Way, a BHA vacant parcel and the SBNDP property, 16 Wendeller Street. Community education and outreach about the benefits of affordable housing continue at community meetings, through our website and through participation in City planning initiatives such as the Dorchester Avenue Planning Initiative. We have succeeded in building support for affordable housing in a neighborhood that was very hostile to it in the past. Successes include the zoning approval of two new projects: 206 West, 16 units of workforce housing and O’Connor Way, 46 units of affordable housing for seniors.

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

facilitated the development of affordable housing. Advocacy resulted in the inclusion of an affordable housing goal in the Dorchester Avenue Planning Initiative of 6% of units for extremely low income households.

2. Rental Preservation and Development:

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

Expected Impact: Affordable housing development and preservation will prevent displacement of low and moderate income households.

3. Supportive Housing for Substance Abuse Treatment:

Activity: After consulting with board members and staff of other non profits, SBNDC is actively pursuing the development of housing with supportive services for women in recovery. This endeavor will involve partnerships with service providers and SBNDC staff time for planning, research and community outreach efforts. The South Boston NDC board has convened a working group of professionals in the field of substance abuse treatment to assist in the planning of this development.

Expected Impact: This project will expand available services and housing in South Boston in order to address pervasive substance abuse issues and a lack of services for women.

4. Housing Counseling:

Activity: South Boston NDC will seek to increase the level of housing counseling it provides. In addition to the as-needed counseling we offer to walk-in clients in our office, we will utilize a database to digitize records and facilitate communication with clients on our waiting list, current tenants, and the broader community about housing opportunities and resources. We will also leverage partnerships with local banking institutions to provide first-time homebuyer courses and potentially other financial literacy education.

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

II. Economic Development Activities

1. Small Business Assistance:

Activity: SBNDC will continue supporting members of the South Boston Chamber of Commerce by acting as a fiscal agent and providing administrative assistance and office space. SBNDC has expanded its staffing of the Chamber of Commerce, assisting in member outreach, and event planning for the South Boston Street Festival, Christmas Shopping Stroll and Tree Lighting and Spring Shopping Stroll. Grant funding from Eastern Bank, through CIRC fundraising, supports this programming. SBNDC is currently consulting with members of the Chamber to expand programming for small businesses.

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

III. Asset Building/Quality of Life Activities

1. Tree Planting:

Activity: South Boston NDC will continue to expand the environmental education and tree planting programming of Southie Trees, as well as the care of at-risk heritage trees in the community. SBNDC continues to advocate for City tree plantings and will plant at least 5 new trees in 2020. We will continue to monitor the health of historic trees and seek additional funding for their care.

Expected Impact: Increasing the number of trees in urban neighborhoods creates many benefits, including a decrease in respiratory illness through pollution filtering, quieter streets due to leaves and branches muffling sound, cooler summers as a result of shade and transpiration, and an aesthetically appealing neighborhood

environment which can increase social capital and reduce crime. All of these impacts contribute toward making South Boston a healthier, more livable neighborhood.

2. Community Gardens:

Activity: In the original CIP, South Boston NDC planned to continue to support the expansion of the programming of South Boston Grows. This program closed in 2015, and South Boston NDC has staffed 2 community gardens to continue this mission to increase the availability of fresh produce to low income households. SBNDC will expand vegetable gardening opportunities at all rental properties, where feasible

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

3. South Boston Farmers Market:

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

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

4. Climate Action Initiatives:

Activity: South Boston’s geographic location, limited green and open space, and relatively low tree canopy coverage make the neighborhood especially vulnerable to flooding and erosion caused by sea level rise, stormwater flooding due to more frequent and severe weather events, and the health impacts of urban heat islands, among other challenges. SBNDC will continue raising awareness of these issues and helping community members build their capacity to mitigate and respond to the ways climate change is now and will continue to impact South Boston. The Climate Action Partners initiative serves as a platform for residents, community based organizations, business owners and other stakeholders to work together toward these goals, and we will continue to leverage our collaborative partnerships to deploy projects that respond to topics identified by community members as most urgent and relevant.

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

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

I. Evaluation Process

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

Evaluation Process: Ongoing monitoring and reviewing of key performance indicators (KPIs) will be at the core of our evaluation processes, allowing us to measure progress against benchmark metrics. We will solicit input from SBNDC staff, board members, and fundraising consultants, and incorporate feedback from community stakeholders as well as industry-standard best practices, to define the KPIs most relevant and useful to SBNDC, in addition to the metrics identified in the table below. To encourage buy-in among stakeholders

and ease implementation, we are working to integrate these practices into our existing operations as much as possible and to ensure the evaluation process adds value and introduces efficiencies for our staff and residents.

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

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

Evaluating our economic development work involves participation of the South Boston Chamber of Commerce and business owners providing feedback on Chamber activities and opportunities to increase relevancy and efficacy through formal channels (surveys), and informal outreach. An important qualitative measure of success in this area would be a shift among business owners to take more ownership over Chamber functions, as Chamber administration and operations are currently handled by SBNDC. Workforce development programs such as Julie’s Family Learning Program and Notre Dame Education Center could also be engaged in this area as relevant projects arise.

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

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

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

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

*Benchmark data available

Section 6: Collaborative Efforts to Support Implementation

I. Affordable Housing Collaborations

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

Julie’s Family Learning Program (JFLP): JFLP serves low income mothers and young children, providing Montessori child care, job readiness and life skills training. Many of their clients are in substance abuse recovery and need affordable housing. JFLP is committed to working with SBNDNC to advocate and provide technical assistance for the development of supportive housing for women.

Caritas Communities: SBNDNC partnered with Caritas Communities as co-developer for Patriot Homes, 206 West Broadway, and O’Connor Way, which is currently in construction. This partnership has enabled SBNDNC to take on a financially complex development utilizing Caritas’s expertise in veterans housing and their staffing capacity for pre-development, project management and construction management.

Boston Housing Authority (BHA) and Mary Ellen McCormack Resident Task Force: SBNDNC will work closely with task force members and housing authority staff to ensure that the process of applying for the very-low income units with project-based subsidies is clear, accessible to BHA residents, and that informational materials are adequately distributed.

II. Economic Development Collaborations

South Boston Chamber of Commerce: SBNDNC currently provides administrative resources, including staffing, meeting space and internet access, and is the fiscal agent for the South Boston Chamber of Commerce, which represents small businesses, primarily those located in the Broadway retail business district of the neighborhood. SBNDNC has increased its staffing support to the Chamber, assisting in outreach and community special events, such as the South Boston Street Festival, Christmas Stroll and Spring Stroll.

III. Asset Building/Quality of Life Collaborations

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

Homeownership and Financial Literacy: SBNDNC will collaborate with City of Boston Credit Union, Eastern Bank, and other local banking institutions, and community-based organizations, such as South Boston en Accion, to deliver first-time homebuyer workshops and financial literacy services.

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

IV. Other Collaborations

South Boston Association of Non Profits (SBANP): SBANP is the key to almost all of SBNDNC’s collaborations in South Boston. Collaboration among South Boston’s extensive network of nonprofit organizations has been on-going for several years through the SBANP. South Boston NDC will continue to report to and receive feedback from the members of SBANP to implement the CIP.

Fourth Presbyterian Church: The pastor of Fourth Church served as the president of the SBNDNC board for several years, and continues to be an active board member. The church is extensively involved in social justice

issues, including affordable housing and youth employment, and is a strong advocate of SBNDC programs and projects. Fourth Church has played an important role in organizing support for several of the initiatives outlined in the Community Investment Plan, such as the affordable housing developments, 206 West and O'Connor Way.

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

Commonwealth of Massachusetts and other agencies: SBNDC received substantial funding from the State for the Patriot Homes project, including LIHTC, HIF and AHTF. The project also received Brownfields and Tax Exempt Bond financing from MassDevelopment. The O'Connor Way project has been approved for LIHTC and has a reservation of funds from MassDevelopment. The 206 West Broadway project has received funding for environmental testing from MassDevelopment. The Southie Trees program received a matching grant from Mass DCR for the preservation of heritage elm trees.

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

The activities in the CIP address the organization’s stated goals and community-wide issues in South Boston, such as increasing displacement and income disparity, that greatly impact low and moderate income populations, but have implications for the community as a whole. The affordable housing activities address the income disparity in South Boston by reducing displacement of low and moderate income households. The economic development activities provide employment opportunities for those low and moderate income residents. The quality of life activities address asset building for low and moderate income households through wealth-building and financial literacy, providing counseling to the housing insecure, and improve health outcomes by preserving green space and targeting health issues such as asthma and obesity, which disproportionately affect low and moderate income populations, and can have negative impacts on children’s educational achievement and lifetime earning potential.²

There are dozens of government and other plans for the South Boston community. South Boston has been the epicenter of development in the city for the last 15 years. SBNDC has ensured that its CIP aligns with the community visions indicated by other major plans for the area, some of which are explained below:

- **Housing a Changing City: Boston 2030, 2018 up-date:** This report is the City’s comprehensive plan for housing development. It outlines several initiatives, including funding priorities and plans for Boston's seniors and middle class. SBNDC supports the middle class housing initiative by providing apartments that are accessible to the middle class below 80% AMI. The O'Connor Way project addresses to the City's senior housing initiative and the fact that seniors are the fastest growing demographic in Boston.
- **Plan Dot Ave/Dorchester Avenue Planning Initiative (BPDA):** SBNDC staff and board were extensively involved in this planning process to transform the area between Andrew Square and Broadway Station, from industrial uses to a new residential neighborhood. SBNDC , in partnership with other nonprofits, successfully advocated for the inclusion of low income housing into the plan for this area.
- **Climate Ready: South Boston:** Proposes initiatives to “ensure South Boston is prepared for climate change impacts,” including infrastructure improvements and adaptations as well as assisting private facilities, businesses and other community members to access emergency preparedness resources and training. There are several city-led infrastructure projects in the works. Our Climate Action and community engagement work focuses on awareness and preparedness efforts.
- **Zero Waste Boston,** released June 2019, outlines the city’s plan for drastically cutting the amount of trash ending up in landfills by 2030. A core recommendation of the plan involves improving the recycling rate and compliance across the city, targeting an 80% recycling rate (the current citywide recycling rate is about 20%, but only about 14% in South Boston). Our Climate Action Work involves educational programs about recycling and reducing waste for community groups and SBNDC residents.

Section 8: Financing Strategy

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

² DATA SOURCE: Boston Behavioral Risk Factor Survey, 2010, Boston Behavioral Risk Factor Surveillance System (BBRFSS), Boston Public Health Commission

DATA ANALYSIS: Boston Public Health Commission Research and Evaluation Office

South Boston NDC has extensive experience leveraging multiple private, state, federal and city sources to develop affordable housing, as demonstrated by the development of over 200 units of housing. Both new projects, 206 West and O'Connor Way, involve the use of public land for affordable housing development, and both have received commitments from the City of Boston for Inclusionary Development Policy (IDP) Funding totaling more than \$7 million. The O'Connor Way senior housing development has been approved by the state for LIHTC funding. These projects will also include private financing. They are expected to begin construction in 2017 and 2018.

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

South Boston NDC will finance the implementation of the CIP activities as follows:

I. Affordable Housing Activities

1. Pre-Development Work: SBNDP will use its reserves and new funds leveraged by the CITC to fund pre-development work, as it has done in past and current projects. Once projects close and begin construction, these expenses are reimbursed from the project budget, and the funds can be used for the next project. SBNDP has partnered with organizations such as Caritas Communities and with private developers to leverage resources to conduct planning, research, financial analysis and design development. We have participated in the Federal Home Loan Bank Affordable Housing Design (FHLB) competition to take advantage of the talented student labor pool in Boston. Through the FHLB competition, we developed preliminary design and financing plans for the development of Patriot Homes, as well as for 206 West Broadway and O'Connor Way Senior Housing.

2. Rental Preservation and Development: SBNDP is experienced in the methods of financing affordable housing development. Past projects have utilized City, State and Federal sources to develop affordable housing. To implement the CIP, SBNDP anticipates using its reserves and funds raised through the Community Investment Tax Credit to acquire occupied rental housing and/or vacant land for future projects. Other current and planned projects include:

- **Patriot Homes:** Construction was completed in November, 2016. This development includes 24 affordable rental units for veterans. SBNDP and its partner, Caritas Communities, received designation from City of Boston to redevelop a former city-owned police station. The City also committed Inclusionary Development, Neighborhood Housing Trust, and Leading the Way funding. Support from the State included 4% Low Income Housing Tax Credits, HSF and AHTF.
- **206 West:** South Boston NDC and Caritas Communities completed 16 studios and 1-bedroom units of workforce housing, affordable to households below 80% AMI. The project includes 2 homeless set-aside units and ground-floor commercial space for a cafe. The project was financed with City and private bank financing.
- **O'Connor Way Senior Housing:** After an extensive public RFP process, SBNDP and Caritas Communities received tentative designation in September, 2015, from the Boston Housing Authority for a site adjacent to the Mary Ellen McCormack public housing development. This project will include 46 affordable one-bedrooms for seniors. We have received Zoning approval and funding approval from the Boston Planning and Development Agency for a portion of the necessary funding. We expect a 2018 construction start.

3. Supportive Housing for Substance Abuse Treatment: SBNDC owns a property at 16 Wendeller Street that could be built out to accommodate approximately 8 units. We are considering a potential use for women in recovery from addiction. Redevelopment of this site will likely require capital and operating subsidies from the city and state. We will work closely with the City to determine project feasibility. SBNDC has convened an advisory group of service providers, including the Gavin Foundation, a local addiction treatment program, to advise on the plan for this project. There is likely abutter opposition to this project. In addition, the Archdiocese of Boston owns adjacent property and is planning to re-develop their site. We are exploring possible partnerships to address community needs for substance abuse treatment.

II. Economic Development Activities

Small Business Assistance: South Boston NDC has expanded its support of the South Boston Chamber of Commerce, providing staffing for Chamber initiatives, fiscal sponsorship and administrative support. In response to requests from Chamber of Commerce members, SBNDC will commission a guide and map to local businesses SBNDC received a grant from Eastern Bank to further increase small business support and will expand fundraising for this work.

III. Asset building/Quality of Life Activities

- **Southie Trees and Community Gardens:** These programs are supported by grants from the South Boston Community Development Foundation, DCR and Loews Foundation.
- **South Boston Farmers Market** is currently supported by the South Boston Community Development Foundation, and sponsorships from Tufts Medical Center, Eastern Banks and East Boston Savings Bank. We will continue to leverage funding for these programs through CITC donations.
- **Climate Action and Community Engagement initiatives:** Utilizing CITC funds allowed SBNDC to hire an additional full-time staff member to advance our climate action and community engagement work. CITC funds will also support the implementation of a CRM system and fundraising consultant to organize, strategize, track, and scale our community engagement and fundraising capacities in 2019-2020. As we continue to see success with our climate action work, we are researching grant funding to support continued and expanded work in this area.

Section 9: History, Track Record, and Sustainable Development

I. History and Track Record of Past Practices

Throughout its 35-year history, South Boston NDC has been dedicated to developing affordable housing for a broad range of residents, including the elderly, families, first time homebuyers and renters. SBNDC has a long track record of partnerships and collaborations with both nonprofit and for profit partners to achieve the 200 affordable housing units that have been created since its founding, and will continue that approach in order to achieve the goals of the Community Investment Plan.

South Boston NDC has and will continue to meet development standards that include extensive community input into planning and design, construction standards sensitive to the environment and energy conservation, and improving the lives of low and moderate income residents, as demonstrated by the following projects:

- **206 West:** This project was completed in May, 2019 and includes the new construction of 16 affordable apartments and cafe space, funded with Inclusionary Development Program funds and a mortgage from Dedham Savings.
- **Patriot Homes:** SBDC has completed a 24 unit apartment complex serving low income veterans. This development is state-funded with HSF, AHTF and other sources and has achieved LEED Silver certifiability.

- **Taylor’s Market:** SBNDC renovated a vacant historic site into seven affordable apartments and two commercial spaces. SBNDC received assistance from the state-funded Housing Stabilization Fund and a loan from the Massachusetts Historical Commission to complete this development in the summer of 1997.
- **Father Martin Co-op:** SBNDC developed 34 units of family limited equity co-op housing that the organization assembled from both city- and privately owned vacant parcels. This development was funded using Low Income Housing Tax Credits and other sources.
- **Castle Cove Senior Center:** This elderly apartment co-op was completed in partnership with Co-op Services in 1997 on the historic site of the Boston Beer Company. The development was funded by HUD Section 202.

II. Consistency with the Commonwealth’s Sustainable Development Principles

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

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

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

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

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

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

Expand Housing Opportunities: Affordable housing development is the core mission of SBNDC. The organization will **expand affordable housing opportunities** in South Boston that will meet the needs of low and moderate income households, as well as those in recovery from substance abuse. Providing more affordable housing options will help preserve the economic diversity of the neighborhood.

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

Increase Job and Business Opportunities: The small business support outlined in the CIP will **increase job and business opportunities** by strengthening small businesses who are local employers. The 206 West project includes affordable space for a local café.

Promote Clean Energy: SBNDC developments and its Southie Trees program reduce greenhouse gases and consumption of fossil fuels by employing innovative building technologies and planting trees. Improving the energy efficiency of older buildings in our portfolio and educational efforts to improve recycling rates and reduce energy waste also supports this principle.

Plan Regionally: As evidenced in Section 7 above, SBNDC has ensured that the CIP aligns with and **supports established local, regional, and state plans**. SBNDC determines its activities by their potential for community-wide benefits.