



Southwest Boston Community Development Corporation

Updated Community Investment Plan 2020-2022

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

Southwest Boston Community Development Corporation works to build and sustain a thriving, economically diverse community in the neighborhoods of Hyde Park and Roslindale. We actively work with our partners to develop affordable housing, prevent the housing displacement of low-to-moderate income families, promote climate resiliency, ensure access to good transit, and protect conservation land and our waterways and to strengthen the commercial base of the neighborhood.

Approximately 35,000 residents make up our service area in Hyde Park. Almost 50% of residents are of African American/Caribbean descent, 20% are Latinx and about 30% are White. Our neighborhood is mostly low to moderate-income residents where a staggering 40% of households have a combined income of less than \$60,000 a year. 40% of the residents in our neighborhood have children under eighteen living in the household. 30% of residents are non-US born. This is a working-class neighborhood of families and seniors that is ethnically and racially diverse and low to moderate income. A substantial portion of residents are renters and most of the housing stock is close to 100 years old. SWBCDC has focused most of its programming on Hyde Park due to the heightened need for affordable housing and protection from displacement in this low to moderate income neighborhood.

Our organizational focus is also on Roslindale, and some of our work under this CIP will support low and moderate-income Roslindale families. In Roslindale, 42% of households earn less than \$50,000 a year, including 29% who earn less than \$35,000 a year. 27% of residents are African American and 24% are Hispanic or Latino. 29% of Roslindale residents are also foreign born. Efforts are currently underway to buy a 26-unit building on Washington Street in 2020 to expand our work in that service area.

The tenants in our three recently acquired Access and Opportunity Program (AOP) homes and the 27-unit development Residence at Fairmount Station (RAFS), reflect the racial and economic make up of Hyde Park. Our 56 units of housing are occupied by low to moderate income families, elderly residents and singles who are people of color. Our office on Fairmount Avenue stands alongside dozens of small businesses owned and patronized by mostly immigrants, people of color and women. These restaurants and food service businesses, hair, and nail salons as well as multiple convenience stores are staple businesses in our community.

Hyde Park has the most urban wilds in the city of Boston and the Neponset River runs alongside our neighborhood. Our work on the broader Green Initiative is focused on maintaining and keeping our urban wilds and waterways like the Neponset River clean and resilient. The Green

Team, our summer youth program, employs about fifteen Boston youth each summer to provide job training and connects youth to adult climate change advocacy and planning in our community.

The Fairmount Station Commuter Rail is critical to our residents who depend on the line to go to work and school. Our decade-long partnerships with other CDC's in the Fairmount Indigo Collaborative have led to the stabilization of the Line; which has been critical to strengthening the economic base of our neighborhood. We continue to work with our partners to ensure low fares, additional stops, and frequent trips on this line and to expand our Fairmount Greenway Task Force.

Our mission and goals are aligned to address the needs of our residents in both Hyde Park and Roslindale through the availability of adequate affordable housing, the development and maintenance of green spaces, ensuring dependable transportation and continuing community organizing efforts that look to elevate neighborhood voices and concerns.

Section 2: Involvement of community residents and stakeholders

SWBCDC involves community residents at every level of the organization. We also regularly engage other local agencies to collaborate in our work and to give input. 10 out of 11 of SWBCDC's Board of Directors are residents of Hyde Park or Roslindale. The remaining one is a former resident of Hyde Park who engages in commercial activity in Hyde Park. The board is elected by the organization's grassroots membership at the annual meeting, which is an open community event. Anyone who cares about improving their community, completes a membership form, and pays dues (of the amount they can afford), can become a member of SWBCDC and apply to serve on the Board of Directors. Since our last drafting of our CIP in 2017, two residents and P.O.H.W.E.R members (our organizing committee) have joined the Board of Directors.

In January of 2019, SWBCDC hosted a Business Breakfast that was attended by 12 local business owners of Fairmount Ave as well as 3 representatives from DBEDC (Dorchester Bay Economic Development Corporation) which led to the referral of 10 businesses to the Fairmount Corridor business network. Just this spring, the SWBCDC staff has made 90 phone calls to all our own tenants, our community civic leaders and allied organizations, and our local businesses in response to Covid-19. We have spoken in depth to 50 of those called. Many significant needs were identified by residents including: funds to cover rents, funding for food, unemployment due to layoffs, getting to food stores and pharmacies safely, and family tensions with in-home online teaching, restless children, and over-extended parents. We provided residents with a list of resources made public on our website. We connected over a dozen small business owners to other organizations like the Black Economic Council of Mass, BECMA, to receive emergency economic relief and funding. A strong majority of those reached were women, POC, immigrants and ESL business owners.

Since our last CIP in 2017, P.O.H.W.E.R (People of Hyde Park Wanting Equal Representation) has emerged and successfully overseen the completion of Doyle Park, a two-year process to convert an open parcel into a community park space. With the P.O.H.W.E.R Committee, as well as with the East River Neighborhood Association and the Solomon Foundation, SWBCDC met with Artist for Humanity to design a mural for Doyle Park depicting residents enjoying the river. The mural, funded by Patronicity and painted by youth employed by Artists for Humanity, was completed in September of 2019. Residents were involved in each step of the process and

decided through outreach and meetings that Doyle Park would consist of “natural” equipment like big boulders, cut tree trunks, climb-through tree rings, and rope “crossings” between vertical trees. Over 100 residents took part in these meetings over the last two years.

Our budding community organizing committee reflects the demographics of Hyde Park with regard to race and income and provides for the most meaningful involvement of community residents and stakeholders in our organization and in the community at large, outside of board membership. Members of the committee range in age from their mid 20’s to mid 60’s and represent tenants, homeowners, and young adults who live with their parents because they cannot afford to move out. The overwhelming majority of participants are low, very low or moderate-income. The organizing committee has identified core issues it cares about, which has helped inform SWBCDC’s real estate development and community organizing strategies, as well as other programs.

Coalition building on new efforts include the Kresge Foundation grant supporting Climate Change engagement along the Fairmount Line. This effort targets transit service and safety, broader Green initiatives like Doyle Park and the walking-biking river path along the Neponset River, all in the context of broader climate change mitigation and prevention strategies. New resident leaders have recruited new members, chaired meetings, developed strategies, created outreach materials, presented at the December 2019 annual meeting, and determined next steps to win positive changes in their community. In this way, residents actively monitor the development of affordable housing, ensuring that our own developments and those of other developers meet local needs. This has led to improving transit on the Fairmount Line, creating a greenway in Hyde Park, completing the final designs and capital improvements in the long vacant Doyle Park, and in 2020, monitoring EPA’s designation of the 100-year polluted Neponset River as a US Priority Site that now qualifies for superfund resources. Governor Baker plans to sign the request, and the clean-up will begin.

SWBCDC staff work with the new leadership on recruitment, outreach, facilitating meetings, negotiating with city and state officials. Residents have participated in 3 park clean-up days and one family celebration with the immediate Doyle Park neighbors that continue in 2020. They have attended other civic meetings to keep up with newer proposed developments. The youth jobs and youth leaders we are training come from low- and moderate-income households in our target area. Leaders represent the neighborhood’s demographics and their engagement is growing. While previously they may have felt unable to voice their concerns in their community, they are speaking up more; and they want more options to get involved. For many, their involvement with SWBCDC has been a first opportunity to shape their community.

While much of our development work has been based in Hyde Park, a proposal for 90 market rate apartments across the street from the 8-unit property SWBCDC owns on American Legion Highway in Roslindale has been resisted. Our tenants and other residents want to ensure that new development does not cause a hike in housing costs and further the current displacement occurring. In 2020 we built relationships with leaders of the local civic group along American Legion Highway who prefer more mixed-income apartments and more green space there.

A recent 2020 DND sponsored neighborhood meeting of 150 people in Roslindale demonstrated a HUGE demand for more reasonable apartment and home prices. From one controversial meeting we heard a high level of interest in more affordable housing, but the utilization of one public parking lot would have negatively impacted our long blighted but recently stabilizing

business district. People signed up to go on tours with SWBCDC to identify new prospective development sites. Responding to the need to preserve affordable housing in Roslindale, SWBCDC recently signed a Purchase & Sale agreement for a 26-unit apartment building and made an offer on a 3 family in Roslindale.

Building on our own staff and board relationships with local leaders there, we expect to conduct more work in Roslindale. Our current Executive Director and some board members also have a long history of organizing with many diverse groups through local churches, apartment complexes, crime watches, attending community service update meetings, and working with our local Roslindale Village Mainstreet. RVMS recruited shareholders and held house parties to help raise donor funds for the Village Market in the 1990's, and they continue to sponsor growing Saturday Farmers' Markets both in summer and indoors in the winter. The annual fall parade also engages thousands of fans and participating groups.

We will continue to work with residents and community members in both Hyde Park and Roslindale, as well as new networks in Mattapan. There is a prospective 6-acre development site, owned by a local church, and we have been invited by the church to build partnerships, rather than polarize people. We will continue to inform our community organizing and development work and efforts in all of our program areas and goals.

Section 3: Plan Goals

Priority issues remain affordable housing and other development that meet the needs of local low and moderate-income families; coronavirus-related financial support for rent, food, medicines, unemployment, and small business cash. In addition, people still seek reliable transit, and improved open spaces like our urban wilds and Doyle Park, job opportunities, and cultural activities that reflect the community at large. The contacts with residents, allies, and businesses to prioritize needs during the coronavirus crisis is making local leaders more visible in broader neighborhood decision making and less polarized as an "outsider group." The goals of our Community Investment plan are as follows:

A. Continue to expand the number of affordable rental and homeownership units

Once we demonstrated our determination to stabilize tenancies and prevent displacement, SWBCDC started buying additional AOP houses. The city in 2019 offered **\$100,000/unit** which allowed us to buy 13 apartments in 3 occupied properties in Hyde Park's central neighborhoods, that house people of color and low-moderate income tenancies. This strategy is key to preventing the hollowing out of low and moderate-income people in Hyde Park and Roslindale.

We have provided an offer on a fourth property with 26 units in Roslindale, where one of the two owners had planned to convert the units to condominiums. The city recognized the value, strategic location, and the need to save these tenancies, and has now increased their current subsidy levels for this property to \$130,000/unit.

Property	Status	Units	Cumulative Units

American Legion Highway	Bought by SWBCDC in 2016, partial renovations	8	8
Small AOP Properties	bought by SWBCDC between 2019-2020	13	21
Residence at Fairmount Station	completed in 2018, fully tenanted in 2019	27	48
Washington St. Roslindale	in the acquisition pipeline for 2020 in Roslindale	26	74
1020 Harvard Ave.	potential of 70 new units & community center	70	144

B. Continue to provide youth jobs and develop the next generation of Hyde Park leaders

Since the Green Team summer youth program began in 2009, we have employed over 150 Boston youth. We continue to run this program in partnership with the Boston Department of Youth Engagement and Employment (DYEE) and the Boston Parks Department. This year, due to the Covid-19 pandemic, we continue our work in the woods with protective PPE and by maintaining social distancing requirements and exacting standards for safety. Job training will take place on Zoom.

C. Continue to fill gaps in services for low- and moderate-income residents in Hyde Park and Roslindale while also providing a path for residents to learn about opportunities to get involved with SWBCDC's community organizing activities. In this way, SWBCDC will grow its organizational membership and pool of leaders, and, as a result, diversify the leadership of Hyde Park and Roslindale so that it better represents these communities' demographics with regard to race, income, national origin, and age. Current SWBCDC membership is 425.

Since our Hyde Park Community Resources, SWBCDC makes individual referrals to those former partners. Our staff called 90 of our tenants, neighborhood allies, seniors, small businesses, and civic groups to assess people's status and needs during the Covid-19 pandemic in 2020. People are getting referrals to RAFT for rental support while people are laid off, small business grants and or loans, unemployment assistance, food, rides, and PPE. We will continue to connect residents, former youth, community members and local small businesses to resources during this ongoing crisis. We recently referred 12 small businesses to BECMA, Black Economic Council of MA, which connected owners to banks willing to assist businesses with less financial resources.

Maloney Properties, the management company for the RAFS 27-unit apartments, provide resident services through their own specialist, especially now during the coronavirus, where two families have gotten the virus and have since quarantined and recovered.

D. Support a racially diverse base of local low and moderate-income leaders in winning campaigns around one or more of the community issues that are of concern to them: affordable housing and anti-displacement, public transit, cultural activities, economic development and jobs, open space, and environmental preservation. The

benefit of these campaigns for residents will be that residents will feel comfortable in their community, believe in their ability to improve their community, have the capacity and power to make change, they will get to live in a community that is shifting in order to provide a built environment, services and a general quality of life that better meets their needs.

E. Build organizational stability and growth through the expansion of real estate development activity as well as expanded relationships with institutional and individual donors and through expansion of our membership base.

F. Ensure continued alignment among board, staff and our growing membership on organizational mission, vision and values and ensure internal documents are aligned as the organization expands its programs and membership base.

Each of these goals is intended to benefit low and moderate-income families. The residents we are engaging in our community organizing work in Hyde Park and Roslindale are outraged at the overheated market and the price of both apartments and for-sale homes. We have learned from a private broker that 80% of those snapping up properties do not even live in Boston or even the US. Families with multi-generations are being displaced. Young residents are being pushed out and their parents want to stay in the neighborhood, but it is increasingly more difficult. Through a door knocking campaign that reached 85 families, we learned that people want to stay in the neighborhood and “age in place,” but the gentrification is evident to them. They want to see more homes that they and their neighbors can afford. Their voices reinforce our vision and goals to maintain a multicultural and mixed income neighborhood

Section 4: Activities to be Undertaken

We will undertake the following activities in order to reach each goal:

A. Expand the number of affordable rental and homeownership units and maintain a steady real estate development pipeline and manage existing housing properly.

48 units have been completed and 29 more may be ready by the fall of 2020, totaling 77 units. We hope to have another 60-70 new construction units in the pipeline by the end of 2020, which, (when completed in 2022-23) will get our total to 147 units. We aim to see at least 15% of affordable units we create be for ownership, and the rest, rental. The impact will be that the low- and moderate-income families who live in these units will have stable, healthy homes which will contribute to more financially and emotionally stable lives.

B. Provide Youth Jobs and Develop the next generation of Hyde Park Leaders while also building a connection between the Green Team and SWBCDC’s community organizing.

SWBCDC’s Green Team is one of only 40% of the city’s funded summer youth programs that are continuing despite the various shutdowns due to Covid-19. Our staff have modified the program to include all job readiness and life skills training via Zoom. We will bring smaller teams to the woods each day so youth can still have the experience of spending time in nature while learning concrete landscaping skills. The smaller teams will allow staff to closely supervise youth, keeping them safe using PPE and maintaining social distancing. Staff will lead Zoom training on proper workplace conduct and conflict resolution, resume writing, interviewing, “virtual” field trips to America’s national parks and environmental films, and

climate change and mitigation strategies, community issues of greatest concern to youth and how they can help create change. We will expand training on community organizing during the Green Team summer program to introduce Green Team youth to SWBCDC's adult leaders and to educate youth about the local impacts of climate change. We will do this by identifying programmatic and advocacy activities that will help mitigation of these impacts.

Our Kresge Foundation 2020 Climate Change planning grant has already attracted new adult leaders and neighborhood allies. Our expected two-year "implementation phase" will begin in 2021, and we expect youth will be fully engaged. The impact on our constituents will be to provide local youth with opportunities. They are better prepared to secure and retain satisfying work later as young adults and beyond. They also have the confidence, skills, and community relationships to continue to grow as local leaders.

- C. Grow SWBCDC's organizational membership and pool of leaders and, as a result, diversify the leadership of Hyde Park and Roslindale so that it better represents these communities' demographics with regard to race, income, national origin, and age. The impact of this work on our constituency will be an increased voice and influence of residents of color and low-income residents in decisions that directly affect them and their community.**

We will also develop leadership paths within the organization to enable new participants and members of SWBCDC to gain a range of opportunities for involvement and ultimately join the Board of Directors, as they are interested. Two of the POHWER leaders joined the SWBCDC Board in June, 2019 and have been active in broader issues from 2019 to this year. While we would like the leaders we develop to serve as leaders with SWBCDC, We will also support leaders in accessing positions of leadership outside of SWBCDC as they are interested, including in local neighborhood associations and on the boards of other local groups such as the YMCA, branch libraries, Main Streets, Board of Trade and/or other Hyde Park or Roslindale based organizations. We will also work with leaders to identify the solutions they would like to see and support leaders in crafting campaigns to win the changes they want.

As of the drafting of this CIP, we expect to see the following campaigns over the next 3 years:

- **Influence which types of businesses come into the remaining sites at the Riverwood Shopping Center, which is** located in a low-moderate income neighborhood in Hyde Park and serves largely low to moderate income people of color from Hyde Park and Mattapan. The current proposal would include a Burger King and Dunkin Donuts, which local residents do not want. SWBCDC's community organizing committee has developed a goal of seeing businesses that are: healthy, locally-based, kid-oriented, provide good paying jobs, provide fun, and attract shoppers.
- **Influence new residential development in Hyde Park and Roslindale to ensure it has significant levels of affordable housing that reflects what current residents can afford,** and that developments meet other needs, such as that for local jobs. There are currently nearly 900 apartments being proposed in Hyde Park among just three large market rate developments. As we tackle our first large acquisition in Roslindale, our reputation will grow, and we have already gotten calls on another affordable home ownership project near wetlands in Roslindale.
- **Win approval from the Department of Conservation and Recreation to reinvest in Doyle Park; to continue to organize and build on the successes of the community at**

this location. SWBCDC has been the funding conduit for POHWER, and helped raise \$12K in 2018 for a visionary Doyle Park riverbank mural painted by local youth Artists for Humanity in 2019. Those local funds also attracted \$100K from the Solomon (Barr) Foundation in 2019 to plan the overall park upgrade. Another \$400K will follow for the final construction. With this upgrade, city parks and Neponset River planners and neighbors laid out the route to create a walking path along the river.

D. Build organizational stability and growth through the expansion of real estate development activity as well as expanded relationships with institutional and individual donors and through membership expansion.

The SWBCDC Board of Directors has long been involved in many details of finance, fundraising for CITC, real estate, green initiatives, and organizing. The Executive Director is familiar with fundraising and real estate and asset management financing. That experience led to 3 new property acquisitions and developer fees totaling \$113,792 in just one year.

We have lost some non-attendees from the board, which opened up more opportunities for new members, mostly people of color, who are now 60% of the board. We are now urging each board member and each staff to help the organization grow through people's contacts, research, and relationship-building, especially with CITC incentives.

D. We will achieve our plan goals by ultimately ensuring continued alignment among board, staff and our growing membership on organizational mission, vision and values and internal documents: This includes reviewing (and as necessary updating) the organization's mission, values, and vision. Our completely updated customer-friendly website, which maintained our former 3-pronged mission goals of affordable housing, resident-driven organizing, and greening public parcels & infrastructure for environmental health, will continue to make our work more accessible and inviting.

E. We will continue to review and update the bylaws (including a review and update of the membership policy), personnel policy, logo and website as needed to ensure internal systems and external messaging and communications align and support our mission, values, and vision. We believe that implementing a real time strategic planning method at the board, staff and committee level will allow for all new decisions to be filtered through an organization-wide shared understanding of goals, mission, and vision. These final two areas of activity will ensure the longevity and effectiveness of SWBCDC, which will enable all of the other goals and activities mentioned above to positively impact our constituencies.

Section 5: How Success Will Be Measured/Evaluated

Southwest Boston CDC continues to use a database established in 2016 with Salesforce to track donations, membership participation, levels of leadership, services provided and other details. Each staff person is responsible for inputting data relating to his/her program. This duty will be tracked in more detail by our new Executive Assistant. We track attendance at committee and board meetings and at other organization-hosted events, types of leadership activities undertaken by the residents in our organizing program, the kinds of services provided to residents who seek

help with housing, job search or other needs, and donations from individuals and institutions for CITC. Using this database and by separately tracking the outcomes of other work such as real estate or civic improvements won through organizing campaigns, we can measure success in the following indicators, shown here with the staff who most own that data:

We measure success in our CITC contributions from both individuals and institutions on a four-part criterion: 1) number of donors retained each year, 2) the number of donors who increased their gifts each year; 3) the total funds raised each year and 4) total number of new donors. This is the responsibility of the Executive Director, Board of Directors, and Operations-Communications/Executive Assistant.

We measure our work in affordable housing by units preserved (if we did not buy them, like the Florence Apartments in Roslindale), completed, units in the pipeline and units in pre-development and construction. This is monitored by the Executive Director, Real Estate Committee, and our consultants.

In just the last year this was measured by the acquisition of three properties totaling 13 units of affordable housing occupied by low-to-moderate income tenants and families as well as the recent completion and fully tenanted 27 units of affordable housing at the Residences at Fairmount Station.

Our pipeline includes 26 unit mixed-income rental apartments at 4345-4351 Washington St. in Roslindale. The city is willing to go to \$135K subsidy per unit (totaling \$3,510,000) for this very attractive property to keep it affordable; and PCI and another participating lender is willing to do \$5,829,662 in debt. We finalized the P&S with a \$100K deposit from our joint-venture partner in July, 2020. Another 3-decker home in Roslindale is under negotiation. There are also 70 units in the pipeline at 1020 Harvard Street, Mattapan: Bishop Noelle & his Church of God has owned 6 acres in Mattapan for 20 years with no debt. Neighbors want home ownership and less density. SWBCDC attended one year of meetings bringing Traggorth as joint venture partner, doing feasibility, building partnerships, reviewing earlier development proposals that were defeated by neighbors, and supporting interviews of over 20 stakeholders in the area. One possible partner of interest is Rogerson Senior Communities, with whom SWBCDC proposed to develop 81 units at the Rogers School in Hyde Park in 2019. (see below)

In 2019, we created a new joint venture partnership with Rogerson Senior Communities on 81 mixed income senior rental units at the former Rogerson Middle School in Hyde Park. Completed pre-development, designs, financing, and submitted a bid. We were competing with earlier nonprofit proposing fewer units and higher income tenancies, and a for-profit proposing immensely dense number. The higher income proposal had been lobbying for this over 2 years and won the bid. However, Rogerson communities are still interested in two possible sites for another JV development.

We measure the number of residents in our own housing developments that are involved with SWBCDC programs in addition to being a tenant of SWBCDC. Most recently, two residents of RAFS (Residence at Fairmount Station) have recently shown interest in the Board of Directors and two local POHWER members joined the Board of Directors in June of 2019. A third friend of a POHWER director has also expressed interest in the board.

We measure the number of new residents involved with organizing annually by measuring the number of residents who emerge as leaders and the amount of total participation by all members (measured by repeat participation, attendance and committee meetings and time invested in planning). This is tracked by our Assistant Director and our Green Initiative Program organizer. In 2019 and 2020 we had 11 and 14 members emerge as well as participation rates of 40% and 50% by all members.

How the organizing committee and its wider constituency win the specific campaign goals it sets is tracked by the number of youth who participate in the summer Green Team program, the number of youth in our year round efforts after the Green Team ends as well as the level of leadership youth demonstrate through their own testimonials. This is monitored by our Assistant Director and Program manager. In 2020, Green Team youth employment is 17 Boston residents (higher than usual given that we are one of the few organizations continuing and re-adjusting our program in the wake of the Covid-19 pandemic. In the last few years, we have averaged 2-3 youth participating in year-round efforts after the Green Team ends. Testimonials on youth leadership are featured on our website.

The Number of residents who receive social service support is monitored by our Assistant Director, Program Manager and Executive Assistant. In 2020 this was displayed in the work of 90 COVID calls by staff which resulted in 50 conversations, referrals for rent coverage, resources about the stimulus check, small business supports with partners to connect folks to economic relief like the PPP, as well as direct case management assistance provided by Maloney Properties resident service staff.

Number of residents whose problem was resolved or who was successfully referred after visiting our Resource Connection program is monitored by our Assistant Director and Program Manager. Following our Covid-19 Outreach and Resource List, approximately 20 tenants received substantial information, 4 got RAFT replacement rental subsidies; and 12 small businesses received assistance with the SBA PPP program through BECMA, (Black Economic Council of Mass), a direct lending and support organization for minority businesses run by Segun Idowu, a SWBCDC Board member.

Number of residents who received direct services from SWBCDC and then continue to participate with SWBCDC on one of our committees is monitored by both the staff and Board of Directors. In 2020, 12 residents participated in either tenant committees, POHWER, or Climate Change collaborative efforts.

The extent to which our board reflects the Hyde Park and Roslindale communities with regard to income, race and national origin is monitored by the Executive Director. In 2020 our demographic is as follows: 8 African Am. 5 Caucasian; 5 low income; 4 low-moderate income; 4 middle income.

Section 6: Collaborative efforts to support implementation

Partnerships are essential for Southwest Boston CDC to meet the broad and complex goals that our members have for Hyde Park and Roslindale. Our work relies on collaboration with the following organizations to meet mutual goals:

Real Estate Development Partners: Our four-year ongoing partnership with for-profit developer, **Traggorth Companies**, helped develop the Residences at Fairmount Station. They brought expertise and a balance sheet that enabled acquisition of financing and LIHTC awards. This joint venture brought SWBCDC \$266,500-developer fee and overhead during 2017-2019, and 1/3 ownership.

Our 18-month partnership with **CRC Builds**, (joint venture with Jonathan Kaye and Milo Tavoliero) led to the acquisition of 13 units of Access and Opportunity Properties and another 26 units under agreement with a private seller in Roslindale. SWB total assets on properties bought includes the following: 100% ownership on 3 new multi-family properties, \$113K cumulative developer fees, upfront cash lent by CRC for offers, purchase & sales, and post-acquisition repairs. In return for their property management, CRC will earn 6% of gross monthly rents and 1/3 of developer fees.

Rogerson Senior Communities partnered with SWBCDC during 2019 to bid on former middle school. They are also interested in a 6-acre parcel in Mattapan. Other potential partners: POAH is interested in a large 300-unit portfolio on River St; Winn Companies and Maloney Properties are more interested when new larger opportunities arise.

Green Initiatives & Organizing Partners:

City of Boston Parks and Recreation: Parks and Recreation continues to serve as a key partner for the Green Team, the Green Community Initiative, and the Climate Change planning process. They train our youth on landscaping techniques and urban wild restoration, and manage the scope of work our youth conduct at the urban wilds.

Boston Department of Youth Engagement and Employment: DYEE continues to pay the wages of youth and one crew leader in our Green Team summer jobs and environmental stewardship program. **BCYF- Boston Center for Youth and families:** BCYF has covered the cost of an additional crew leader each of the past 3 years. **USDA Forest Service** – has provided paid interns for the Green Team for the past 2 years and has purchased tools and equipment for the Green Team's Work. **Neponset River Watershed:** had done annual water quality and sediment testing along with EPA and helped measure the PCB and fecal matter in river water which led to designation by EPA as a US Priority (superfund) site. Awaiting Gov. Baker letter!

Boston University, Boston College and Salem State Schools of Social Work: Each year for the past 15 years, our Assistant Director, who has an MSW, has served as a field instructor for anywhere from 1-3 MSW interns who worked at SWBCDC for their required academic year field placement. The interns each worked 2 – 3 days a week on our assorted services and organizing projects as well as the Green Team. This resulted in two interns yearly since 2017.

University Researchers: SWBCDC continues to partner with universities to complete vital research projects at little or no cost to SWBCDC. We expect to retain other student teams to address research needs as they arise over the next 3 years. In 2020 a Harvard environmental & sustainability student is providing deeper research on best practices in our Climate Change work.

YouthBuild Boston: We have worked with YouthBuild to develop a universal design home that could serve as a model for DND sites that go out to bid under the Neighborhood Homes initiative. That design is now being implemented at one site in Hyde Park. The limited fees and extensive time requirement ended this joint venture.

The Fairmount Indigo CDC Collaborative (FICC) : We have a 15 year collaboration with **Codman Square NDC and Dorchester Bay EDC:** Most of SWBCDC's anti-displacement, real estate development, open space and transit work focuses on the area along the Fairmount line corridor in Hyde Park to make all of our efforts in these areas stronger through the development of shared strategies, coordinated implementation of strategies, shared information, and shared fundraising. 18% of SWBCDC's FY 2016 budget came from grants raised jointly via FICC. In 2019 \$40K came from TBF via FICC. In 2019-20 SWB received \$20K of Kresge planning grant via FICC for Climate Change engagement, organizing, and planning. In 2020-22 we expect \$40K+/year from Kresge for 2 years of implementation on Climate Change actions.

SWBCDC is also active with wider networks of groups working along the Fairmount Line: The **Fairmount Greenway Task force** conducts research and helps to advance a 6-mile walking and biking greenway along the line. SWBCDC members serve as the Hyde Park representatives to the Greenway, working to advance the Hyde Park portion and ensuring that the regional plans reflect local interests. SWBCDC's work to improve transit on the Fairmount Line happens in part through the **Fairmount Indigo Transit Coalition** which brings together a broad base of groups to back the agenda for improved service and lower fares (which we won in 2015).

Greater Boston Grassroots Groups with a Development Focus: We have collaborated with other grassroots groups throughout the region who are also focused on greater resident control over local development issues, such as **Longwood Area Neighborhood Association, Keep it 100% for Egleston, JP Rox, and DSNI.** Our members and theirs have met to share ideas on strategy, and to gain a sense of support and camaraderie in the effort to form a city that provides what local low- and moderate-income people need and want.

Members of Hyde Park Community Resources (convened by SWBCDC in 2008): local churches, social service agencies that serve Hyde Park and representatives of local neighborhood associations all participate in this coalition that SWBCDC convened. This partnership enabled us to connect more widely with local residents (via the agencies or churches where they may receive services), allowed us to understand better the issues our members face, and provided us with vital information about current services in the area. While currently unfunded, these partnerships endure and SWBCDC still cooperates with these groups.

City Life /Vida Urbana: We partnered with City Life around a large portfolio of apartments in Hyde Park and Mattapan where tenants faced rent increases of \$200 - \$600 and (in some cases) gross violations of the health code. This partnership allowed SWBCDC to identify more

residents to involve in our community organizing committee, while we have helped City Life connect to more tenants to engage in the tenant association it was forming. City Life also gave us information on the recent new owners of the 300 units, Advanced Property Management (APM). As a result of this relationship with City Life, SWBCDC had sought to purchase these properties, an effort that will continue in the near future but was interrupted with the gap in Ex. Directors in 2018. In 2020, our AOP acquisitions broker will call the new owner, Oleg Uritsky.

Another local civic group on the Roslindale-JP line, **the Woodbourne Association**, is promoting more racial inclusion, wants affordable homes, and has recruited SWBCDC to look at properties that are being bought or proposed by highly speculative developers. 6 of them attended our annual meeting on December 17, 2019, and they have been in contact with us for the whole 2020 winter-spring.

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

The elements of this plan are part of one comprehensive community strategy to a) ensure low and moderate-income residents, and residents of color have a say in development and other decisions in their communities, b) that there is adequate housing with costs reflecting the incomes of current residents, c) that families are not displaced, d) that we expand transit service, and, e) that we work with local partners on actions to improve the quality of life for all families such as through improved parks, cultural resources and other amenities.

Several elements of this CIP are geographically close, allowing SWBCDC to have a greater impact in implementing our comprehensive approach. The Residences at Fairmount Station, Doyle Playground, the proposed Hyde Park portion of the Fairmount Greenway, the Riverwood Shopping Center where residents seek to influence the kinds of stores that are added to the site, and the portfolio of rental units in which tenants are facing massive rent increase and dangerous code violation that we are pursuing for purchase, are all within half a mile from each other and from Hyde Park's main commercial district and from Fairmount Station itself. We have continued this approach for the past 3 years and into 2020 and will do so through 2022.

This CIP from 2020-2022 continues to align with the BRA's 2011 Hyde Park Master Plan, which describes this vision for Hyde Park: "Hyde Park should be an attractive, vibrant, and safe neighborhood that: Celebrates its unique cultural and urban diversity, and natural and historic resources; Provides housing, jobs, commercial and recreational opportunities for a diverse population; Supports and encourages the expanding creative economy; and is Innovative in the reuse/redevelopment of underutilized buildings and parcels." These recommendations from the plan directly align with SWBCDC goals:

- a) Residential Districts: "ensuring that the community continues to embrace its diversity through the provision of diverse unit sizes and affordable housing."
- b) Commercial Districts: "Attracting and maintaining a better mix of stores and services to serve both residents and patrons from outside the neighborhood."
- c) Encouraging mixed-use (any combination of retail, office and housing) to create more lively commercial districts."

- d) Industrial Districts: “preserve Hyde Park’s industrial legacy through maintaining key industrial districts for continued industrial use, continuing to look for emerging industries that can be attracted to Hyde Park, and ensuring that zoning and other regulations continue to support those industrial uses which bring jobs and economic vitality to the community.”
- e) Open Space: “Protecting and expanding access to open space ...support of the proposed Fairmount Greenway which will follow the Fairmount Commuter Rail corridor.”
- f) Transit: “advocating for more frequent MBTA commuter rail service and reduced fares”
- Sustainability:
- g) Diversity of housing types, sizes, income level... A variety of open space types...A variety of multi-modal transportation choices with fully connected pedestrian and bicycle routes...Preservation of natural terrain and vegetation...Clean up and reuse of former industrial properties...support of mixed commercial and residential use...Citizen and stakeholder participation.

This CIP also aligns strongly with the City of Boston’s Imagine Boston 2030 Plan in that it will engage residents in making plans for their own communities, create affordable housing, work to advance better service on the Fairmount Indigo commuter line, connect residents with jobs, contribute to efforts to strengthen the commercial base in Readville, to support efforts to establish a business association for Readville businesses, and educate youth and the public about environmental stewardship and climate change. These efforts are all items prioritized in Imagine Boston 2030, which is emerging as the core document outlining the city’s development goals for the next 23 years.

Section 8: Financing Strategy

Southwest Boston CDC has a three-pronged fundraising approach that relies on individual donor contributions, grant awards and development fees from housing. SWBCDC requests \$100,000 in CITC funding in FY21. In the last three years, we have had high levels of tax credit utilization as detailed by our CITC chart included below. We have a sturdy base of individual donors who have utilized the CITC program in the past few years and whose contributions are vital to the operations of our organization. Their donations have made it possible for our small staff to continue in our efforts to secure more affordable housing for low to moderate income residents and to continue in our climate change green initiatives as well as our transit equity organizing. This program has helped incentivize new private, corporate, and foundation donors to give and old donors to give more. Their contributions are crucial to our organization's goals and work.

Individual Donors Utilizing CITC: Our financial strategy for the year 2020-2022 is to create an organization wide philosophy towards fundraising that includes the Board of Directors, members of our local committees, the Executive Director, and the staff. The Board of Directors will use their decades long relationships in the community and in their work spaces to grow our individual donor base. We seek to build new relationships with community members who have not yet given and by reconnecting with previous givers who may now be incentivized to give larger contributions under the CITC program. We may be a smaller CDC, but we have

demonstrated our ability to fundraise consistently. Our current Executive Director, Jeanne DuBois, has over thirty-years of experience in fundraising and countless relationships in the community. This has helped SWBCDC to reach its CITC goals and utilization rates in 2019 even without new CITC awards in 2018. With the help of our new administrative assistant, we have identified over three-hundred former donors and plan on sending commitment letter requests detailing our new victories in securing more affordable housing, our growing staff, our new website and our continued work in climate change-green initiative programs. We rely on the CITC program to increase our fundraising capacity.

SWBCDC FUNDRAISING INCOME 2018- May 2020

	2018	2019	2020
Developer Fees	\$90,836	\$216,500*	\$113,981
Government Grants	\$39,499	\$11,520	\$30,250
Grant Income (Raised by SWBCDC Directly)	\$36,075	\$56,245	\$23,000
Grant income (raised by Fairmount Indigo CDC Collaborative)	n/a	\$40,000	\$27,000
Individual CITC Donors	\$19,500	\$31,500 *	**\$13,000
Corporate Sponsors (mostly CITC gifts)	\$52,660	\$27,899*	***\$29,474
In Kind Donations (legal, consultant, MSW)	\$32,263	\$70,928	\$98,297
United Way CITC	\$46,000	\$46,497*	****0
Individual Donors & Board (smaller gifts)	\$11,150	\$3,728	\$4,000
Total Income Expected	\$379,339	\$504,817	***\$339,002

*\$50K of 2019 RAFS fee was deferred, but will be distributed within the next 2 years.

*In 2019: We raised \$105,896 in CITC from individuals, corporations, and foundations, including United Way.

**In 2020, with only little in remaining CITCs, we raised \$42,474 in individual, corporate, and foundation CITC contributions, but there may have been delays with filling out a part 1 or 2.

***This amount can increase substantially if we get a CITC allocation this summer,

****A new CITC allocation this summer can help SWBCDC attract United Way donors again.

Grant Income: SWBCDC has deep experience applying for, reporting on and properly expending grants. Grant income is expected to increase significantly in coming years now that SWBCDC has a new Executive Director with demonstrated success in grant writing, now that our real estate development program is progressing and now that we have expanded programs of community organizing and social services. We recently received \$20,000 out of \$100,000 in funding with the Fairmount-Indigo CDC partners from the Kresge foundation to do climate change education and organizing. We continue to have a steady pipeline of funders that support our work. We recently outsourced some of our grant writing and were successful in receiving

funding from two funders towards housing renovations for low to moderate income properties and unrestricted funds to support our small but growing staff.

Developer Fees and Overhead Payment: SWBCDC was not able to realize approximately \$30,000 in deferred fees from our 8-unit **American Legion Highway** project, because of the extreme capital needs for that building, which has led to an annual drain of approximately -\$50K cash for each of the last 3 years. The Boston Department of Neighborhood development has awarded \$200K to resolve serious capital needs there, which should lead to more stable rental income, recapture of our deferred fee, and average asset management fees of \$11,000/year in the future.

We did realize a total of approximately \$315,000 in developer fees and overhead payments from the **Residences at Fairmount Station** between June 2017 and August of 2019; but this income came much later than the expected December 2018 delivery. Also, delays in construction and even getting tenants occupied impinged upon our expected developer fees by another \$50K in August, 2019. Thankfully that disappointment is now a “deferred “fee item which we hope to recapture by December of 2020 or into 2021.

SWBCDC earned \$113,981 in developer fees with our three new AOP projects at Lexington St. Arlington/Hyde Park Ave., and Westminster St., in the same program as ALH- American Legion Highway. The new homes did not have the level of capital needs as ALH. Fortunately, all of the AOP homes were relatively fast acquisitions, resulting in fees at closing. While SWB =CDC did not budget for additional fees during the next 3 years beyond those for projects already underway, our recent 2019-2020 productivity has demonstrated that fees from the AOP projects initiated during the 2017-2020 CIP actually totaled \$113,981 (plus an \$8,000 deferred fee for 17 Lexington by December, 2020).

Section 9: History, Track Record and Sustainable Development

Southwest Boston CDC has a 20-year record of accomplishment of success, which has become stronger during the past two years. Highlights of earlier successes include:

- **Organizing to Preserve Expiring Use Units:** Between 2004 and 2008 SWBCDC partnered with City Life / Vida Urbana and the Massachusetts Alliance of HUD Tenants to organize tenants of the Florence Apartments and Weld Park senior affordable apartments, both in Roslindale. These developments were at risk of going market rate and displacing tenants. Our collaborative work was successful and these 140 units were preserved with a former Red Sox player.

- **Founding Member of Fairmount Indigo CDC Collaborative in 2005:** SWBCDC collaborated with CDCs along the Fairmount rail line to form the Fairmount Indigo CDC Collaborative, the Fairmount Indigo Transit Coalition, and the Fairmount Greenway Taskforce, the latter two are now independent organizations with whom we collaborate. The FITC focused on adding stops, reducing fares, getting transfers and simplified Charlie Cards. The FICC focused on development, preventing gentrification and displacement, creating transit oriented affordable housing and other development. The Fairmount Greenway Task Force focused on

expanding green spaces and a greenway along the line and connecting residents to jobs. Our work with the CDC collaborative continues today. In recent months both the FICC collaborative and the FITC have fought for the establishment of special protection zones to prevent displacement near the train stations.

• **Initiation of Youth Jobs and Environmental Stewardship Program.** In 2009 SWBCDC developed and initiated our Green Team youth program. Since 2009 we have hired over 150 youth ages 15 – 23 to work over the summer in the local city-owned Urban Wilds, including Dell Ave, DeForest, Monterey Hilltop, Mother Brook, Sherrin Woods and West Street Urban Wilds. This program has involved a vital partnership with the Boston Department of Parks and Recreation, which sets the scope of work for the urban wilds. In 2014 the Green Team became the first program in the city of Boston to use goats for landscaping. The Green Team's use of goat scaping helps to remove significant overgrowth of poison ivy and other invasive plants from the city's urban wilds. Since inception, the program has also included job readiness and leadership development training and environmental education. Over 90% of youth are kids of color. Paul Sutton of the Parks and Recreation Department has noted, *"SWBCDC's Green Team Program has been invaluable in restoring and beautifying numerous natural areas in Hyde Park. The Boston Parks Department highly values the accomplishments of our multi-year partnership with the Green Team."*

• **Affordable Homeownership Opportunity:** in 2012 SWBCDC and a development partner completed the rehabilitation of a 3-family home at 990 River Street in Hyde Park which was sold with affordability restrictions to a moderate-income first-time homebuyer. We are currently exploring a partnership with residents of the Longwood Area Neighborhood Association, which has reached consensus to build 4 units of affordable home ownership on parcels which also have adjacent wetlands the neighbors want to support.

• **Convener of Hyde Park Community Resources:** SWBCDC has successfully convened this group for several years. The first meeting after a two-year hiatus saw a packed room of over 25 attendees, showing the interest and need for the group and the community's confidence in SWBCDC's ability to make the coalition useful for them. The Community Resources was redeveloped in 2020 as a service committee to address the immediate needs of residents during Covid-19. This led to our staff checking on all of our tenants, compiling a resource list still available on our website, and referring small business owners to partners with connections to banks and emergency economic relief funding.

SWBCDC became the first organization to use funding from the City of Boston's new Acquisition Opportunity Program when we purchased our first property at 875- 889 American Legion Highway. This building is important because all 8 units have 4 bedrooms, and a sale on the private market would likely have resulted in rent increase and risk of homelessness for these large low-income families. In addition to \$600,000 in City funds, SWBCDC received predevelopment financing from CEDAC and permanent tax-exempt bond financing from Boston Private Bank, with bonds from Mass Development. This deal provided SWBCDC with over \$58,000 in fees which enabled the hiring of a Community Organizer. We have continued to utilize the AOP program and have in just the last two years acquired three new small properties and gotten a large 26-unit property under agreement in Roslindale.

• **Permitting and Financing of Residences at Fairmount Station:** In 2015 SWBCDC met a major milestone with the permitting and award of City funds for its first new construction project. This award followed significant resistance from neighbors who were threatened by low income people with problem kids. In 2016 the development was awarded financing from DHCD. In 2018 the construction was complete and in 2019 RAFS is fully tenanted with families and singles at three income levels. This development was the first family affordable housing to be created in Hyde Park in nearly 25 years.

Our work is rooted in equity. We work in Hyde Park and Roslindale because these communities have large populations of low-income families and people of color whose voices have not been heard enough in the past and who have been negatively impacted by the decisions made by others. Our organizing work continues to develop leaders from among these populations who we support in influencing local decisions. Our work to develop affordable housing, win investments in blighted open spaces and a polluted river, provide youth jobs and train tenants on their rights, and referring local businesses to growing resources for small businesses, all directly contribute to greater social, environmental, and economic justice.