

WATCH CDC Community Investment Plan

Section 1: Community or constituencies to be served

WATCH serves the urban suburb of Waltham, a city of 60,600 people approximately nine miles west of Boston. Waltham grew up during and after the Industrial Revolution of the late 1800s and early 1900s, when many factories established themselves along the Charles River. These companies built housing and recreational facilities for their workers near the work sites. Just as during that time, when immigrants came to Waltham for greater opportunity, Waltham remains a city of immigrants. Based on 2010 Census data, 26% of residents are foreign born and 32% of its residents speaks a primary language other than English. US Census data indicates that Waltham's Hispanic population increased by 65% between 2000 and 2010, with 8,629 residents, 14% of the population, identifying as of Hispanic origin in 2010.

Waltham is home to a large very low-income population. WATCH's target community is this low-income population, which tends to live in the city's dense Southside, often in housing that was originally built for industrial era factory workers. The latest census data shows that nearly 40% of Waltham households earn less than \$50,000 a year. And 20%, or over 4,600 households, earn less than \$20,000 a year. Many of WATCH's participants fall into this very poor sector of the community. The average income of individual tenants who visit WATCH's Housing Clinic (who tend to be their household's sole earner) is under \$15,000 a year. The average income of the adults in our English classes is under \$16,000 a year. Many of the tenants and English learners at WATCH work in landscaping, house cleaning, and low wage retail positions.

Waltham functions as a Gateway City for immigrants from across the globe, yet it does not quite meet the state qualifications for one. It is home to many wealthy families and corporations, yet thousands upon thousands of families work in very low wage jobs and struggle to cover the costs of their most basic needs. It is home to a relatively thriving downtown with increasingly more high-end restaurants, yet it is also home to four downtown dollar stores where WATCH members frequently shop. Waltham's local government—entirely white, 87% male and rarely experiencing turnover—does not fully represent its community, and often seems out of touch with the needs of its low-income residents.

There is a dire lack of decent and affordable housing in Waltham. Waltham lacks enough homes priced to align with local families' incomes. Waltham's 2011 – 2015 HUD Plan notes that 78% of all Waltham households face housing "cost burdens". These burdens fall most heavily on low-income residents. As of April 30, 2013 Waltham had 3,968 housing units of 24,805 (7.2%) designated as affordable for low- and moderate-income households. However, over 10,000 Waltham households earn less than 80% of the Boston-area median income and need these lower-priced homes. Of these low-income families, over 7,000 pay more than 30% of their income towards their housing costs. Over 4,000 households spend more than half of their income on housing.

Despite these challenges, there is a strong core of individuals and agencies in Waltham that act to implement programs and activities that move the city toward greater representation of all in local

government, more stability for local families, and more equity in services. WATCH plays a key role in this work and has the potential to continue to move individuals and agencies to positive action in order to help families and communities thrive here in Waltham.

Section 2: Involvement of community residents and stakeholders

The WATCH CDC Community Investment Plan (CIP) was developed by a combination of WATCH staff and board members, with guidance and input from members. Members include individual residents and church members of Waltham and surrounding towns, public officials, business men and women, and leaders of partner and civic organizations.

WATCH's work is member driven, and we encourage active involvement of all of our members. WATCH defines membership in two ways: active members are engaged in one of our programs. They may be English students in an ESOL class, residents who get help from our Housing Clinic, members of the Tenant Action Group, English tutors, or volunteers with one of our low-income home weatherization events. WATCH also has paid members: those who contribute any amount of money to WATCH each year because they care deeply about our work. We seek to have as many of our members as possible be both paid and active members. Approximately 90% of our paid and active members are Waltham residents. The remainder live in neighboring communities, such as Lincoln, Weston and Lexington; they see Waltham as their neighbor.

The month-to-month work of the organization is driven by the interests of the membership. For example:

- WATCH's English program includes a committee that meets quarterly to plan events, consider improvements to the program, and learn about how to become more deeply involved with other aspects of WATCH.
- In 2009, WATCH initiated a planning process around our community organizing work, to bring residents on the same page with regard to housing goals for the community. The result was the Community Housing Principles (included in Section IV), which was endorsed by the WATCH membership through a vote at the 2010 annual meeting. This document continues to guide WATCH's goals today.
- In 2011, during WATCH's strategic transition from housing development to direct support programs and organizing, we held two member meetings and conducted a survey via email to get feedback on the transition, ensure we were in accord on the mission, and set program priorities given limited resources. More than 100 people gave input at that time. Their contributions helped finalize WATCH's strategic plan to move away from affordable housing development toward more emphasis on organizing for affordable housing in Waltham.

WATCH's eleven-person Board of Directors, responsible for ensuring WATCH is financially sound and carries out its mission, is made up entirely of Waltham residents who came out of our membership. The Board meets at least ten times a year to make decisions on the goals and priorities of WATCH as well as give input on strategies to support our work. Nearly half of the board members are low- or very low-income.

The Board is elected at WATCH's annual meeting by WATCH's general membership. The annual meeting is attended by approximately 80 members each year. WATCH also uses the annual meeting to engage members on strategic decisions and to move organizing campaigns forward. For example, at the April 4, 2013 Annual Meeting, WATCH kicked off an organizing campaign by having each of the 85 attendees each write a letter to their Ward City Councilor about their interest in seeing more affordable housing in Waltham.

A recently formed WATCH Advisory Board will ensure even greater community input and assessment of WATCH's CIP. The sixteen-member Advisory Board includes former WATCH board members, members of the business community, an attorney, professors, the editor of the local paper, and the Director of the Waltham Housing Authority. The board met in December to offer comments and feedback on WATCH's plan, and it will continue to meet twice a year.

Section 3: Plan goals

Over the long term, WATCH's goals are to improve housing conditions for Waltham's low-income tenants and build the collective voice of tenants in advocating for affordable and safe housing.

In 2005, WATCH, along with the Waltham Land Trust, led a campaign that passed the Community Preservation Act (CPA) in Waltham. Each year, Waltham raises approximately \$3.5 million in CPA funds from local property tax surcharges and state matching funds. Waltham now holds \$15.4 million in undesignated CPA funds. To date only 4% of the funds have been used in the affordable housing area, even though the CPA is mandated to spend at least 10% on affordable housing (see Section IV).

WATCH's Community Investment Plan is focused on "freeing" vital local funds that are required for affordable housing development in Waltham. Through this work, WATCH will grow a base of strong tenant leaders who will become a powerful force in moving elected and appointed municipal officials to increase affordable housing development in Waltham.

We will accomplish this goal through an organizing campaign that focuses simultaneously on the housing issue most directly affecting thousands of Waltham's poor families (poor housing conditions), as well as on the issue of local funding for affordable housing development. In this way, we can effectively engage tenants to address an immediate problem they have, while also working towards the ultimate goal of more affordable housing in Waltham.

Waltham public officials in the recent past have shown resistance to supporting the development of affordable housing with public funds. Recently, however, a shift has begun to take place. A new Planning Director has been hired. A new chair has been named for the Community Preservation Committee (CPC) and the new chair is a long-time WATCH supporter and in favor of spending CPA money on affordable housing programs. Four community members have joined the CPC, which formerly consisted of only five city department heads. The CPC is finally completing its first annual plan for expenditure of funds and a public hearing on the plan will be held in the spring. While the City Council and Mayor have in the past resisted development of affordable housing, they recently approved two downtown developments that will include

affordable units. The conditions appear favorable to elevate awareness of the housing crisis in Waltham and bring community pressure to bear on alleviating the situation.

WATCH COMMUNITY INVESTMENT PLAN GOALS

Stabilize Housing Situations for Tenants

WATCH will directly assist 250 households annually to stabilize their housing situations with our twice-weekly free Housing Clinic. The clinic trains low-income tenants on their rights under tenant landlord law and provides personalized assistance to resolve urgent housing issues. Because over 95% of tenants who visit the clinic live in Waltham and want to stay here, clinic participants will be the primary group that WATCH draws into the organizing work for more affordable housing.

Organize Low Income Tenants to Advocate for Affordable Housing

WATCH will build a strong voice for affordable housing in Waltham by developing low income tenant leaders directly affected by the lack of affordable housing through our Housing Clinic and WATCH's Tenant Action Group. WATCH will develop a strong, knowledgeable group of residents, the Tenant Action Group, who meet monthly to strategize about approaches and solutions to housing challenges, establish relationships with public officials, speak to public officials and the media about their housing needs and goals, and mobilize other residents for winning affordable housing campaigns.

Get Money Spent on Affordable Housing in Waltham

Through community organizing, WATCH will engage and mobilize these tenants to advocate for the spending of \$3 million of Community Preservation Act funds on affordable housing programs in Waltham over the next three years (2014 – 2016). This will bring CPA spending in compliance with using a minimum of 10% of CPA funds on affordable housing. The investments will result in an increase in safe affordable housing units in Waltham. Possible affordable housing projects include construction of affordable housing, financing renovations to preserve affordability of units, rental subsidies, and renters' emergency fund—all of which have been initiated by other cities in their use of CPA funds.

Increase Inspections and Enforcement of Safety Code Violations

Make a systemic change in the way violations of health and safety codes are enforced in rental housing in Waltham such that deplorable rental housing conditions now affecting Waltham's low-income tenants are vastly improved.

WATCH STRATEGIES

Our overall strategy is to assist low income tenants to meet their immediate housing needs, as well as implement an organizing campaign that focuses on the issue of local funding for affordable housing development. We will also deal directly and in a systemic way with the issue of poor housing conditions by working with the Health Department. In this way, we can effectively engage tenants to address an immediate problem they have, while also working towards the ultimate goal of more affordable and safe housing in Waltham.

Through this organizing campaign, WATCH will:

- Empower low-income tenants and other WATCH members to discover their own potential to improve systemic problems that affect them.
- Create a network of peer support for the tenants so they will not feel alone in their housing battles.
- Create leadership opportunities for tenants to speak out about the need for safe and affordable housing and to help other tenants in similar situations.
- Develop the strategic thinking skills of the members of the Tenant Action Group so they can analyze the power structure of the local decision making bodies and how they can put pressure on public officials to effect change in housing policy.
- Use media stories to profile specific tenants and their needs, as well as the overall issue of CPC funding for affordable housing and the issue of health code violations by irresponsible landlords.
- Build relationships between low-income tenants and their elected officials.
- Effectively pressure and negotiate with elected officials and other decision makers so that local funds for affordable housing are available for affordable housing projects.
- Work collaboratively with the city's Health Department, which conducts residential inspections, to increase communication with the Spanish speaking community and improve the responses when violation inspections are requested.
- Activate WATCH members in the 2015 City Council elections to register voters and to raise the issues of safe and affordable housing in the election debates in order to make affordable housing an election issue.
- Maintain effective programs related to the primary program outlined in this plan. WATCH's interconnected programs fill vital gaps while drawing more low-income Waltham residents into our work, thereby making the organization and our community stronger and better equipped to achieve our goals of expanding affordable housing. These other programs include:
 - English classes & tutoring: WATCH provides professionally taught beginner and intermediate English classes and one-on-one tutoring with trained volunteer English tutors to 90 very low-income immigrants a year. Many of these English learners become long-term active WATCH members and leaders. All of them also struggle to afford decent housing. We will continue to serve at least 90 residents a year with this program.
 - Barn Raising weatherizations of low-income homes: Volunteers come together to make low-tech, low-cost home improvements at small multifamily homes owned and occupied by low-income families. As a result of the improvements, these families save many hundreds of dollars each year on their heating, electric and water bills and prevent tens of thousands of pounds of CO2 from entering the environment. WATCH currently conducts six Barn Raisings a year, reducing energy use and costs for at least fourteen households annually, and involving at least 75 volunteers a year.
 - First Time Home Buyer courses: WATCH holds CHAPA certified courses eight times a year to assist potential home buyers to learn about the home buying process. 150 WATCH members annually will successfully complete a first time home buyer course.

OBJECTIVES TO SUPPORT WATCH's CIP GOALS

- Build membership, education, confidence, communication skills, and leadership skills among members in the Tenant Action Group. TAG will form the core of tenants driving affordable housing campaigns.
- Make a systemic change in the way violations of health and safety codes are enforced in rental housing in Waltham such that deplorable rental housing conditions now affecting Waltham's low-income tenants are vastly improved.
- Educate WATCH members about the facts of Waltham's housing shortage and introduce them to the personal circumstances of families and individuals who struggle to locate safe, stable, and affordable living situations in Waltham.
- Raise public awareness and support for creating more affordable housing opportunities in Waltham.
- Work with the Community Preservation Committee and the Waltham Planning Department to identify fundable projects for city investment in affordable housing.
- Determine the particulars of a first campaign focused on expenditure of Community Preservation Act funds for increasing access to and/or availability of affordable housing to low-income residents. Follow up with other campaigns, based on the experiences and success or failure of the first.
- TAG members continue to identify projects that will improve the housing situations of low-income residents, and advocate for the expenditure of city, state, and federal funds to support the projects.
- Increase the hours for WATCH's part-time Community Organizer and Development Director, so that they can devote more time to the community organizing aspect of WATCH's work.

Low-income households and WATCH's membership will directly benefit when WATCH achieves the goals outlined above. They will gain:

- Leadership skills, such as how to speak at a meeting, how to research a problem and work with others to identify and implement a solution.
- A strong collective voice that they can use to advance the issue of affordable housing and other issues they care about.
- Improved housing conditions, with increased access to affordable housing.
- English language and life skills proficiency, which is fundamental for improving job opportunities, supporting children's education, and better handling the challenges facing immigrants.

The entire community will benefit when WATCH members achieve these goals. The community will gain:

- More stable tenants, with less stress and illness, better educational achievement, and the possibility of better job performance and higher incomes.
- A reduction in the number of apartments in Waltham that have prolonged or chronic health and safety violations.
- Improved governance, economy, and housing conditions.

- An increase in the number of top quality, well managed, and affordable homes in Waltham.
- A more engaged citizenry, including public awareness about local housing issues and the will and means to become involved in solving the problems.
- An optimism for the future, as positive outcomes reveal the power of collective problem solving.
- Finally, a report of The Boston Foundation in 2011 documented that increased language proficiency of parents correlates with higher income, increased educational achievement of their children, better health, and more civic engagement. “Thus, by strengthening English-speaking proficiency and educational attainment of immigrants, adult basic education programs can offer benefits not only to individual immigrants, but to their larger communities as well.”

Section 4: Activities to be undertaken

2014

- Supervise and staff the Housing Clinic on Monday and Thursday evenings, providing assistance to residents for personal and immediate housing issues. Include voter registration and letters to Ward Councilors at intake. Develop a follow-up system to track action taken after a tenant visits the clinic. *Impact: increase civic engagement, improve housing conditions for residents and the city.*
- Introduce residents who visit the Housing Clinic to the activities and goals of the Tenant Action Group, and invite their participation in TAG. *Impact: increase active participation in TAG, increase the number of tenants who can be mobilized for campaigns, build power to effect change.*
- Engage an intern who will update all tenant resource materials as well as assist in updating data intake into our online database.
- Hold monthly Tenant Action Group meetings.
 - Educate tenants on tenant rights.
 - Guide tenants in filing complaints with the Waltham Health Department. Track tenants’ experiences with inspections and results. *Impact: build knowledge and confidence.*
 - Educate tenants on public resources available (including public housing, fuel assistance, cash assistance, medical treatment). Invite public officials to make presentations and answer questions at the meetings. Speakers have varied from a housing attorney, to a member of the Community Preservation Committee, to a representative from the Waltham Housing Authority.
 - Support tenants in identifying, writing to, and meeting with their elected officials, raising officials’ awareness of resident circumstances and the need for affordable housing in Waltham. *Impact: educate tenants about public policy and elected officials, engage tenants in process of change making, alert officials to the need for affordable housing.*
 - Support fundraising for a Tenant Assistance Fund, which will supplement tenant savings to cover security deposits and first and last month’s rent. *Impact: build community and directly improve tenants’ housing situations by allowing them to move into higher quality housing.*

- Help tenants identify and take action on other barriers to safe and affordable housing such as discrimination and problem credit. Invite speakers on how to battle discrimination in the housing search process. Coordinate a free class and one-on-one financial management coaching with the Charles River Internet Center on financial management and credit improvement for TAG members.
Impact: empower tenants to directly improve their financial situations as well as battle discrimination in housing.
- Participate in monthly meetings of the Fernald Working Group, monitoring changes in the status of the property, meeting with stakeholders, and being prepared to take action as appropriate (see page 11).
- Meet with new Planning Department Director Catherine Cagle to discuss working together to promote affordable housing in Waltham and the possibility of WATCH joining the Fair Housing Committee proposed by the Department.
- Meet with the Health Department about breaking down barriers for immigrants to request health inspections of their apartments and follow up after inspections. There are no documents printed in Spanish at the Health Department and no one there speaks Spanish.
- Document all tenant requests for inspection and responses by the Health Department to see if there is need for improvement in the process. Meet with the Health Department late in the year to review data on inspections.
- Participate with Tenant Action Group and WATCH members in the public hearing on the Community Preservation Committee's proposed Annual Plan for expenditure of CPC funds.
- Participate with Tenant Action Group and WATCH members in the Massachusetts Community Development Corporation's Lobby Day at the State House on April 16, advocating for budgets and legislation supporting affordable housing and community development.
- TAG members attend monthly meetings of the CPC and the City Council.
- Educate WATCH members and the public about the lack of safe and affordable housing in Waltham and gain support for increasing the stock in Waltham. We will get four stories a year placed in local and regional newspapers or on local access TV on the need for more safe and affordable housing.
- Publicize the affordable housing issue and WATCH's tenant organizing on our website, in social media such as facebook and twitter, and in our newsletters (electronic and hard copy); tabling at community events, public forums, and public hearings.
- Research and identify the first projects to propose to the CPC for spending funds on affordable housing.
- Meet with the Mayor, the Planning Director, the Housing Authority and ally City Councilors to get input on CPC affordable housing project proposal.
- Host an interagency meeting on housing sponsored by a City Councilor who is an ally and has suggested this meeting.

2015

- Get an affordable housing project introduced and passed through the CPC.
- Identify tenants in key districts to contact their City Councilors to urge support for the affordable housing proposal.

- Build momentum to move the issues forward, especially with churches and local providers of service to the homeless.
- Organize an all-day Housing Conference, involving allies and agencies, including churches. The conference will include workshops on such topics as tenant rights, affordable housing, fair housing law, and steps to home ownership. WATCH will reach out to other agencies to cosponsor the event such as the Community Day Center of Waltham, Waltham Housing Authority, Charles River Internet Center, and the Middlesex Human Services Agency.
- Participate in public hearings and offer comments for the development of the Consolidated Plan of the City of Waltham for the expenditure of HUD Community Development Block Grant funds.
- Engage Waltham voters in the 2015 City Council and Mayoral elections: conduct voter registration, survey candidates on affordable housing issues and publish the results, participate in candidate forums and get voters to the polls.
- Continue to staff the Housing Clinic and hold monthly TAG meetings.
- Get an affordable housing proposal through the City Council approval process and signed by the Mayor.
- If needed, engage tenants to advocate to the Health Department for changes in how inspections are dealt with for safety code violations.
- Continue to implement WATCH's other interrelated programs.

2016

- Continue to staff the Housing Clinic and hold monthly TAG meetings.
- Reassess needs and propose the next affordable housing proposal to the CPC.
- Continue to address barriers to safe and affordable housing as identified by the Tenant Action Group, to possibly include some testing for potential discrimination.
- Continue to implement WATCH's other interrelated programs.

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

The goals and activities sections of WATCH's CIP will be structured into a logic model, which will connect the need for the plan with the desired results (see Section IV). The logic model will illustrate: resources/inputs—activities—outputs—outcomes—impact. We will then frame evaluation questions based on the model, specific to various participants in the evaluation process. Two types of questions will be developed. The first set of questions will focus on activities, outputs, and short-term outcomes (formative questions). These questions will facilitate program reports and suggestions for improvements. The second set of questions will focus on results, outcomes, and impact on participants and the community (summative questions). These questions will facilitate assessment of long-term changes.

At bi-weekly staff meetings and monthly meetings between the Executive Director and individual staff members, formative questions will be used to evaluate the progress of elements of the plan and the need for changes or adjustments. Monthly reports to the Board of Directors will track progress on inputs, activities, and outputs of the plan, and indications of outcomes and impact as they develop.

Other evaluation perspectives will be solicited from the WATCH Advisory Committee and major donors. Twice a year, and through email and phone communication between meetings, the committee members and donors will be asked for input on how WATCH is perceived by the community in its implementation of the CIP and how we can improve our programs and impact. The perspective of Tenant Action Group members is another important source of evaluation information. As members of the group participate in the process of designing and implementing campaigns related to affordable housing, they will continually analyze progress to date and make strategic adjustment in order to move closer to their goals for more decent and affordable housing. Every three months we will also informally interview the group about outcomes of the program on them personally, for example: improvements in their own housing situations, and changes in attitudes, knowledge, skills, or level of functioning.

WATCH will monitor political activity, including the use of Community Preservation Act funds in relation to investment in affordable housing in Waltham. We will likewise monitor City Council approval, or not, of the use of CPA funds and housing developments that include affordable housing. Other campaign goals and results will be closely monitored as well.

Evaluation of WATCH's English language and life skills program is already well established. Initial interviews and assessments include use of the BEST Plus assessment tool and recording employment, country of origin, education, and goals. Student progress is assessed by homework, class performance, and periodic use of the BEST Plus assessment tool. Student perspectives are solicited by means of self-assessment toward their goals, and written evaluations of instructors and curriculum. Outputs and outcomes are recorded at the end of each session: number of students, progress, reasons for exits, new or increased employment, other gains, special activities undertaken during the session (including participation in other WATCH programs.)

Quantitative data is readily available for analysis, as WATCH staff members and Housing Clinic volunteers make it a practice to carefully and thoroughly track data on participation in WATCH programs. WATCH tracks in an online database:

- Tenant individual demographics, housing needs and progress through intake and re-intake forms.
- Attendance at all Tenant Action Group meetings, including the number and race of participants, as well as the number of new versus returning tenants.
- Response to turnout calls for TAG meetings.
- Enrollment in the financial management class provided for free for WATCH members by the Charles River Internet Center.
- The number of tenant leaders who speak to the media or represent WATCH at a public hearing or meeting.
- Requests for inspections to the Health Department, as well as responses.
- Stories in media.
- Volunteers for tutoring and home weatherizations.
- Attendance at all WATCH events and activities.

Section 6: Collaborative efforts to support implementation

Brandeis University: WATCH has collaborated for seven years with Brandeis University in operating a bi-weekly Housing Clinic. In one-on-one consultations, the clinic offers advice, referrals, and support to tenants who are facing problems in their living situations: lack of housing, possible eviction, pest infestations, environmental exposure risks, lack of money for fuel, and so on. WATCH staff and Brandeis students staff the clinic, under close training and supervision by a Brandeis environmental law and America studies professor, and by WATCH's Executive Director. An attorney from Boston College Legal Assistance Bureau also helps train students and provide legal advice and assistance when needed.

The Housing Clinic is often the first critical point of contact for low-income and immigrant community residents for referral to other services such as food and fuel assistance, medical care, and domestic abuse prevention. In addition, the clinic connects clients with WATCH's advocacy and organizing efforts for increased affordable housing, and home energy efficiency, ESL classes, and more. The majority of the members of the Tenant Action Group came first to WATCH to seek assistance at the Housing Clinic.

Through this partnership with Brandeis University, WATCH has become very popular on the Brandeis campus. Students seek out the opportunity to work at the Housing Clinic and to earn other internships in WATCH's office. Brandeis has a culture that focuses on social justice issues and has a relatively activist campus. Brandeis student interns and volunteers commit many hours to WATCH and provide a level of professionalism that is not often found among college-aged volunteers.

Charles River Internet Center: The center provides free computer training courses to students in WATCH's English language and life skills classes. The center is also a resource for coaching on financial management and credit improvement.

Community Day Center of Waltham: WATCH partners with the Center to find shelter, support, and services for the homeless. The shelter is the only day shelter in the metro-west area. Due to the overlap in clients, and their vision for providing services for the homeless, the Day Center is a natural partner in advocating for more affordable housing in Waltham.

Downtown Waltham Partnership: WATCH is a partner and board member the Downtown Waltham Partnership. We expect that the Partnership will be helpful in helping to raise public awareness about the need for additional affordable housing and the improvement of conditions of rental units in the downtown area.

Fernald Working Group: WATCH is a founding member of the Fernald Working Group (FWG), a coalition of five Waltham nonprofits which advocates for a sustainable, mixed-use reuse plan for the Fernald State School site. In 2010 FWG developed a *Community Vision* for this large tract (190 acres) of developable land in Waltham. The vision proposes the implementation of sustainable development principles—those that are environmentally and economically efficient and that provide long lasting benefit to the entire community—to direct the future use of the Fernald Center. The vision includes the development of affordable housing. Waltham is in negotiation with the state to purchase the property, which is currently tied up in litigation with

guardians of the twelve remaining residents on the property. The Fernald Working Group recommenced meetings last summer, anticipating some movement on the status of the property and wanting to be prepared to offer and advocate for a plan that is a community-based model for sustainable, multi-purpose development.

First Parish, Waltham

This Unitarian Church in Waltham administers the Jones Partnership Grant program, designed to build deeper connections between the church and its local community, and to support local efforts that strengthen the community at large. Many First Parish members are also active WATCH members. WATCH has been a recipient of small Jones Fund grants for the last two years. The grants were awarded for public forums. In 2012 the event was a hands-on, interactive energy efficiency workshop. In 2013 WATCH partnered with First Parish to host a event on the local immigrant experience in Waltham, which was well-attended and enthusiastically received. WATCH will build on this relationship to host educational events at the church about affordable housing, and to draw in more church members as active allies to support the development of more affordable housing in Waltham.

Through First Parish, Waltham, WATCH attended a meeting of the Ministerial Association and discussed the homelessness situation in Waltham. As a result, the churches will coordinate the development of a common list of back-up homeless sites with other agencies and shelters. WATCH will prepare packets containing information about how to get to the sites, public transportation available, rules for when they arrive, and other pertinent information. WATCH will translate the materials into Spanish. The packets will be available for Housing Clinic visitors and shared with the Ministerial Association.

Metro West Collaborative Development: WATCH staff and Board helped to found MWCD (non-profit) with representatives from housing groups in Watertown, Belmont and Lexington in 2010. The organization grew out of WATCH's and other groups' realization that we would be more effective in developing affordable housing if we took a collaborative and regional approach. MWCD is WATCH's housing development partner. WATCH works locally in Waltham to raise awareness, funding, and political will for affordable housing developments, and to support MWCD in identifying suitable sites, so that MWCD can carry out the developments themselves. WATCH will continue this relationship with MWCD throughout the implementation of this Community Investment Plan.

Middlesex Human Service Agency: The agency oversees the operations of programs that offer a wide variety of services, including shelter, food, & housing search assistance for the homeless. The agency could be a key partner in speaking out on the need for affordable housing.

Waltham Housing Authority: The Housing Authority issues housing vouchers for state subsidized housing and for the federal government's Section 8 Housing Choice program. The Housing Authority is working with WATCH's Tenant Action Group.

Waltham Land Trust: WATCH partnered with the Waltham Land Trust in 2005 to win passage of the Community Preservation Act, a property tax surcharge, resulting in \$3.5 million per year for use in developing affordable housing, and preserving historic buildings and open spaces.

WATCH continues to partner with the Waltham Land Trust in membership, advocacy, and common vision.

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

WATCH's vision for Waltham is to create a community in which all residents of Waltham, including low and middle income people, immigrants, and others who are traditionally disadvantaged or removed from existing power structure, have a voice and can influence decisions, such that social decisions benefit the whole community and not just a few.

WATCH considers itself successful when we develop more high quality, permanently affordable housing for more tenants in Waltham and the surrounding area, when we are able to assist more tenants in understanding landlord-tenant law and how to protect their homes, when we are able to support more immigrants in gaining English and other life skills and support them in becoming more self-sufficient, when we develop confident and effective low-income leaders who successfully take on roles on WATCH committees or with other community groups, when policies and programs that align with our mission are implemented in Waltham.

WATCH provides services that fill gaps. Those services provide an opportunity for low-income residents to come to our door and discover WATCH. Here, they discover that—in addition to getting that service (learning English or help with housing)—they can join with neighbors to effect positive change in their community. All of WATCH's programs provide an opportunity for low-income Waltham residents to become part of a larger effort for affordable housing in Waltham. The activities we undertake with the Tenant Action Group and allies are all steps that are required to develop confident and effective leaders who can help to advance affordable housing developments in Waltham.

WATCH's Community Investment Plan is entirely consistent with other neighborhood and community plans: those of the Waltham League of Women Voters' *Waltham Visions* project, the Downtown Waltham Partnership, and the Waltham Planning Department. The WLWV undertook a *Waltham Visions* project to gather from Waltham residents information about what they particularly like about living in Waltham. The most consistently articulated answer was: Waltham's diversity of residents and businesses. The Downtown Waltham Partnership is similarly focused on the revitalization of the downtown area, both businesses and residences, as opposed to gentrification and elimination of diversification in the downtown.

The Waltham Planning Department's *Analysis of Impediments to Fair Housing Choice 2013 – 2018* identified the lack of affordable housing as an impediment in Waltham. Actions recommended included, "Encourage the development of all types of affordable housing throughout Waltham. . . . Consider the development of a Security Deposit Grant Program for low to moderate income renters." The Planning Department also recommended, "Create quality affordable housing opportunities that are geographically and architecturally accessible to all residents."

The Planning Department also reported again and again in its 2010 Consolidated Plan (a report on its 2011-2015 CDBG Comprehensive Plan) that Waltham’s low-income residents suffer from a lack of affordable dwellings. Waltham’s subsidized housing inventory, in 2009, stood at 602 units below state housing standard. Over ten years, it would require production of 70 units annually to make 10% of its stock affordable. The Department concluded that “Waltham’s 2011 – 2015 Consolidated Plan will advocate for continued revitalization of the relatively poor South Waltham and Downtown over the next five years by: a) using public funds to leverage private money to restore deteriorated properties and foster economic development, and b) creating affordable housing to meet the needs of low/moderate-income residents.”

Section 8: Financing strategy

WATCH will finance implementation of the CIP through an aggressive fund raising strategy that includes two direct mail appeals annually to individual supporters, personal appeals to organizations and businesses, outreach and presentations to area churches, research and development of grant proposals to private foundations and City of Waltham government, and solicitation of sponsorships and collection of course fees for our First Time Home Buyers courses. Other income will include program fees and income from Community Works.

WATCH’s budget for Fiscal Year 2013 – 2014 is \$212,630.

WATCH CDC Budget for FY 2013 - 2014		
Program Income/ Expenses		
Income		Budget FY14
	Churches	12,000
	Community Works	4,000
	Individual Donations	47,000
	Organizations & Businesses	3,000
	Government Grants (CDBG)	3,700
	Foundations	85,000
	First Time Home Buyers Class	28,000
	Breaking Barriers Program Fees	2,150
	Other Programs & Merchandise	300
	Net 25th Anniversary Gala	27,480
Total Income		212,630

By Fiscal Year 2016, with the help of Community Investment Tax Credits, WATCH aims to raise our operating budget to \$240,800 through the following sources:

WATCH CDC Projected Budget for FY 2015 - 2016		
Program Income/ Expenses		
Income		Budget FY16
	Churches	15,000
	Community Works	4,000
	Individual Donations	54,350
	Organizations & Businesses	45,000
	Government Grants (CDBG)	5,000
	Foundations	85,000
	Bank Sponsorships FTHB	24,000
	FTHB Fees	6,000
	Breaking Barriers Program Fees	2,150
	Other Programs & Merchandise	300
Total Income		240,800

1) Individual Donors

With more attention to donor cultivation and retention, WATCH’s goal is to involve our members more closely in WATCH’s activities and increase their financial support. WATCH’s recent hiring of a part-time staff person dedicated to fundraising will facilitate that goal.

WATCH’s recent history of funds raised from individuals

Fiscal Year	Number of Individual Donors	Total Raised
2010	156	\$33,961
2011	139	\$35,067
2012	160	\$33,904
2013	148	\$38,600

WATCH introduced the concept of Community Investment Tax Credits to our membership at WATCH’s 25th Anniversary Gala October 2013. We discussed the concept at Board of Director meetings and at the Advisory Board meeting. If WATCH is allocated tax credits, we will meet with individual donors to fully explain the CITC program and solicit increased donations from them. We anticipate that we can raise \$54,380 from individual donors by 2016.

Fiscal Year	Number of Individual Donors Contributing \$500 or more	Total Raised
2012	14	\$35,212
2013	13	\$23,718

2) Corporate Sponsors

WATCH has expanded its relationships with corporate donors in recent years. We will foster these relationships in order to sustain or grow this funding and use these relationships to reach out to other Waltham based firms who might have an interest in our work. During calendar year 2013, WATCH used the occasion of our 25th Anniversary Gala to engage new corporate sponsors. In subsequent years, we will work to deepen those relationships.

Sixteen corporate sponsors contributed \$24,600 to WATCH in donations of \$500 or more to the Anniversary Gala. We anticipate being able to increase organization and business contributions to \$45,000 using the CITC program. We have received three signed pre-commitment letters from corporate donors in anticipation of WATCH being allocated tax credits (see Section IV for example).

Additionally, WATCH will continue to solicit bank sponsorships for the First Time Home Buyer courses. We are on track to increasing the number of courses to eight per year. Bank sponsorships are \$3,000 per course.

WATCH has discussed the CITC program with the corporate sponsors who have funded WATCH for a number of years, and with the banks that sponsor our FTHB courses.

3) Church/Religious and Civic Groups

WATCH has raised between \$11,500 and \$18,000 from area churches and civic groups such as the Waltham Rotary Club every year for the last five years. We will work to sustain relationships from religious and civic groups who have contributed annually.

4) Government and Foundations

Foundation grant income remains a vital source of funding for WATCH's work. WATCH researches grant possibilities, writes proposals, and builds relationships with a variety of bank foundations, government entities, and private local and national foundations.

5) Program Fees

Program income comes from two sources: First Time Home Buyer courses @ \$50 per person and adult education classes @ \$60 per person. Some students receive scholarships, based on need.

Section 9: History, track record and sustainable development

WATCH has a long history of successfully carrying out activities similar or identical to those proposed in this Community Investment Plan. At key points during the past 25 years, WATCH has overcome steep political barriers to make significant and positive changes: creation of the Housing Department in Waltham City Hall, passage of Inclusionary Zoning, passage of the

Community Preservation Act, and reaching agreement with a national real estate investment trust to cap rents for over 100 low-income elderly tenants.

WATCH follows a community-building model. No matter what the program, WATCH seeks to connect people to each other and to new ideas, to develop leaders, and bring neighbors together to work collectively on common goals. The primary approaches in this plan include: relationship building, community organizing, leadership development, political advocacy, policy analysis, and development of policy solutions. The secondary approaches are those related to WATCH's other programs, which help connect more people with WATCH and with our primary community development work: adult education and volunteerism. From day one, WATCH has been a deeply welcoming organization that seeks to be effective, not just existing. Over the years many low-income people and immigrants have come to WATCH with a wide range of problems, many of which are not directly related to our programs. People come because WATCH is known in the community as the place to go if you need help of any kind. We continue that culture today, which enables us to engage more and more people each year.

A summary of WATCH's accomplishments during the past 25 years is included in Section IV. It illustrates a track record of successful practices and approaches. Financially WATCH has been the recipient of generous support from a variety of funding sources: individuals, churches, businesses, foundations, program fees, and rental income. We have found the practice of diversifying our sources of support to be successful.

WATCH has been running the Housing Clinic for several years, along with Brandeis University, and has a track record of successfully assisting tenants with their immediate housing needs. WATCH's Tenant Action Group has been meeting monthly since July and has made significant strides in building a foundation for the goals outlined in this plan.

The goals of WATCH's Community Investment Plan are well aligned with the Commonwealth's Sustainable Development Principles. Just as the Commonwealth promotes "sustainable development through integrated energy and environment, housing and economic development, transportation and other policies, programs, investments and regulations", WATCH's interconnected programs work together to advance a subset of those goals: promote safe and affordable housing, provide adult education and support for immigrants, foster leadership development and civic engagement, provide classes for first time home buyers, and help low-income residents weatherize their homes through volunteer work days. Specifically, WATCH's plan supports the Commonwealth's goals to:

Concentrate Development and Mix Uses

One of WATCH's areas of focus is Waltham's dense Southside. This is a priority location for the development of more affordable housing for Waltham's thousands of low-income families. The Southside features a dense, walkable commercial center, bus and commuter rail stations, City Hall, the public library and other features that support this goal of the Commonwealth. Adding housing to the Southside would support the local small independent businesses on Moody Street, and help to further mix residential uses with the other downtown Waltham amenities.

Furthermore, locating housing in the Southside would enable infill development and/or the renovation of existing degraded structures, including many from the Industrial Revolution era.

Advance Equity

WATCH's work is driven by our members' interest in social justice. Every program we offer is designed and implemented to create a community that is both equitable and provides opportunities for everyone to have a voice in local decision making, including those who are poor, immigrants, or otherwise left out. The development of a base of trained leaders who advocate for safe and affordable homes will have two results: a stronger voice for families traditionally left out, and affordable housing for people who cannot afford the homes in Waltham under the status quo. Furthermore, our plan will improve the system for ensuring Waltham's housing is safe and indirectly pressure landlords to improve their property management.

Use Natural Resources Wisely

WATCH's Barn Raising weatherization program, a subset of our plan, results in the collective savings of thousands of dollars by low-income families each year on their water, electric and heating bills due to lower usage of natural resources. This translates into the prevention of tens of thousands of pounds of CO2 from going into our environment each year.

Expand Housing Opportunities

Our plan's primary focus will result in expanding housing opportunities for low-income families in Waltham and the surrounding area. Our primary goal is the development of multi-family apartments. We will focus on advancing housing developments in Waltham's Southside, and in areas where public transportation connects residents conveniently to jobs, schools, and public amenities such as City Hall, the public library, and parks.

Increase Job and Business Opportunities

WATCH advocates for affordable housing development in mixed use settings, which increases job opportunities for residents, retail traffic for businesses, and business opportunities for owners. Perhaps the best example of the consistency of WATCH's approach to development with the Commonwealth's Sustainable Development Principles can be seen in the goals developed for the Fernald School site:

- 1) Preservation of services for the community
- 2) Creation of new affordable housing
- 3) Preservation of historic buildings
- 4) Restoration of a brownfield
- 5) Stimulation of small businesses
- 6) Expansion of Waltham's open space and greenways
- 7) Transportation linked to the development

Section IV: OTHER MATERIALS

- WATCH Community Housing Principles
- Waltham Community Preservation Committee Spending
- Logic model
- CITC pre-commitment letters
- WATCH 25 Years of Accomplishment
- Waltham News Tribune article
- WATCH letters of support