

Fenway Community Development Corporation
Community Partnership and Tax Credit Allocation Application

Community Investment Plan 2013 to 2018

Executive Summary

Fenway Community Development Corporation (CDC) is one of Boston's first CDCs, founded 40 years ago to end a 1970's arson ring, disseminate information to Fenway residents, develop affordable housing, and bring Fenway residents together to strengthen their community through advocacy. Additionally, Fenway CDC strives to improve and maintain diversity, accessibility, and other components of community cohesion and a high quality of life.

Our current goals focus on maintaining a strong, active, and diverse grassroots constituency and increasing the amount of consistently affordable housing in the Fenway. Ensuring the availability of affordable housing will assist in achieving our goal of maintaining community stability by allowing residents and families to grow and age in the Fenway neighborhood.

If chosen for a CITC investment, ***Fenway CDC will use CITC funding to build the capacity and support for its Housing Department.***

The Fenway CDC has an active base of members with several effective committees supporting the vision of maintaining and increasing diversity, providing affordable housing for residents, and advocating for services that improve the quality of life for all Fenway residents. The expansion of institutions and private developments continues to escalate the cost of rent and add to the pressures of low and moderate-income residents in the Fenway. Of particular need to Fenway residents is the acquisition and creation of a substantial number of affordable housing units in the neighborhood. To address this need, the Fenway CDC plans to invest in building the capacity of Housing Department with a greater focus on real estate acquisition in its more expansive area of development. This area will include exploring neighborhoods in Suffolk, Essex, Middlesex, Norfolk, and Worcester counties. With expanded capacity, the Fenway CDC will be working collaboratively, persistently, and strategically to accomplish the following goals:

- Create a housing pipeline of affordable units to be acquired and rehabbed.
- Work to broaden and deepen affordability across the range of need including low and middle-incomes, both in Fenway CDC units and through relationships with private developers.
- Facilitate the increase of successful resident-controlled housing.
- Continue to expand resident participation in civic engagement and advocacy around development and policy issues affecting the neighborhood and city.
- Collaborate with other Fenway organizations, businesses, and institutions to improve cultural opportunities, transportation, disability access, local residents' job-readiness and job-matching, and to support the survival of small, local businesses, and productive economic development.

The Fenway CDC has already identified a number of partners and supporters who recognize the importance of the Fenway CDC's work and are willing to be investors in the work of the next five years through the funding of CITC program.

We are requesting \$100,000 in Community Investment Tax Credits for the first year of these partnerships (2014) to stimulate our plans for development. After demonstrating success in our first year, we plan to expand our efforts and request \$150,000 each following year (2015 and 2016) to continue providing the services outlined in this Community Investment Plan.

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

Fenway CDC serves the Fenway neighborhood in Boston, Massachusetts. Our service area is bounded by Massachusetts Avenue, Huntington Avenue, The Fenway, Beacon Street, and the Turnpike. Our target population are the low and moderate-income families and individuals who reside in the estimated 12,357 rental-housing units in the Fenway neighborhood. Approximately 80% of our service program participants are Fenway residents and 20% come from other Boston neighborhoods. Our Community Planning and Organizing division works to develop the Fenway Urban Village Plan—a sustainable, smart-growth model where residents, businesses and institutional neighbors thrive (for additional information on the Fenway Urban Village, visit <http://www.fenwaycdc.org/urban-village.html>). Fenway CDC will continue to build a healthy, safe and vibrant neighborhood for our residents as well as visitors who come to the Fenway to learn, work, and play.

Demographics

According to the US 2010 census, the total population of Fenway and Kenmore was 40,898. There were 13,745 households and 2,053 families residing in the neighborhood. The racial makeup of the neighborhood was 70% White, 6% African American, 16% Asian, 1% from other races, and 1.7% from two or more races. Hispanic or Latino of any race was 6% of the population, and 22.3% of the population was foreign born. The neighborhood population consisted of 1.7% under the age of 18, 65.8% from 18 to 24, 20.8% from 25 to 44, 6.8% from 45 to 64, and 4.9% who were 65 years of age or older. From 2000 to 2010, the percentage of college and university students from 18 to 24-years-old has increased by 22.8%.

Geography

The Fenway is home to 14 colleges and universities, and while these institutions are important drivers of regional economy, they add significant pressure to the local housing situation. Fenway CDC continues to partner with these institutions to provide civic engagement and service-learning opportunities where students participate in our programs to serve low and moderate-income residents. Since 1994, we have forged several partnerships with institutions to create and sustain a workforce development program to promote economic development for both residents and the institutions. We continue to foster relationships that will lead to housing more students on campus and facilitate opportunities for the creation of affordable non-student housing in the Fenway.

The Fenway CDC board voted in July 2013 to expand the geographic area to be served which will include Suffolk, Essex, Middlesex, Norfolk, and Worcester counties.

Economy

According to the American Community Survey 2007-2011, 37.5% of the households (5,168 households) in the Fenway live below the poverty level compared to 22.2% citywide. The same study also reported that over 40% of Fenway residents have spent *half or more* of their income on rent. The unemployment rate in the Fenway is approximately 10.5%. The median household income in Fenway is \$32,509 as compared to \$52,065 in Boston and \$44,136 in Dorchester neighborhood.

According to a 2013 study by Harvard's Joint Center for Housing Studies, rents in Greater Boston were the third highest among the nation's metropolitan areas. According to an October 2013 study conducted by Northeastern University, rents in Greater Boston currently average \$1,800, compared to \$1,300 a decade earlier.

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The Boston Globe reported that the number of families in the state's emergency shelter system had an average of 4,000 per night in November 2013. In addition, the state spent a record \$46 million last fiscal year to house families in need of emergency assistance in motels, up from about \$1 million in 2008.

While the economy has had a grave impact on many people across the nation, residents and families in the Fenway continue to struggle with maintaining adequate and affordable housing.

Section 2: Involvement of Community Residents and Stakeholders

Mission

Fenway CDC is a membership organization devoted to enhancing the stability, sustainability, and diversity of Boston's Fenway neighborhood by providing opportunities for all residents—but particularly low and moderate-income families and individuals—to thrive in the community.

We accomplish this by developing affordable housing, linking neighbors with jobs and training opportunities, providing services to families and elders, and engaging residents to have a strong voice in their community's future. We seek to capitalize on opportunities and address challenges that arise from the Fenway's unique position in the city of Boston and the high concentration of world-renowned educational institutions that reside in our neighborhood.

The three program areas addressed by the Fenway CDC are:

1. Housing Development and Preservation

Fenway CDC has developed and preserved nearly 600 homes and currently owns and manages 257 units of mixed-income housing. We work closely with institutions, local government, residents, and private developers to forge affordable housing partnerships.

2. Community Planning and Organizing

Our current grassroots planning initiative works closely with residents to expand and update Fenway's Urban Village Plan, build the structure, and develop community leadership capacity to implement it. We collaborate with residents, working professionals in the neighborhood, community organizations, issue-specific interest groups, local institutions, elected leaders, and others to develop support throughout Fenway and the greater Boston area. Our activities are guided by a diverse and inclusive coalition that includes elders and families, low and moderate-income individuals, immigrants, the disabled, and community partners.

3. Resident Services

Our "Walk to Work" workforce development program and resident services have benefitted over 2,000 residents. We also provide support services for housing, social needs, and health and educational services and programs to the low and moderate-income residents, children and families, formerly homeless veterans, disabled people, members of LGBT community, and senior citizens.

Engagement of Residents and Stakeholders

In 2013, Fenway CDC engaged over 1,500 residents and stakeholders in more than 195 community development activities, community planning meetings, and community building events. We have a membership program and 11 working committees where residents and community stakeholders are deeply engaged in planning, organizing, leading, or controlling activities. Please refer to Attachment D for our Community Engagement Summary Report.

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1. Membership

Fenway CDC has over 110 dues-paying members who reflect the community's diversity, with low and moderate-income residents and people of color well represented. Our members elect the 18-member volunteer board of directors at our annual meeting. We engage our members through community meetings, educational workshops, and community building events. In May 2013, approximately 250 members and community stakeholders (residents, community partners, benefactors, and elected officials) attended our 40th Anniversary Annual Meeting. Together, we celebrated the community building efforts and many accomplishments of Fenway CDC.

2. Board of Directors

Fenway CDC has a board of directors of 18 who meet on the second Monday of every month. Selected board members participate in the 11 organization committees and provide governance and strategic oversight for the work of the organization. They also ensure that our work aligns with the larger community through collaboration with residents and community stakeholders.

3. Executive Committee meets on the first Monday of every month. They evaluate and recommend key decisions to ensure that resources, programs, and services align with the mission of the organization to serve our constituency.

4. Finance Committee meets on first Monday of every month. The Committee analyzes financial data, evaluates financial performance of the organization, reviews funding strategies, and monitors and approves financial policies. All major financial decisions are reviewed by the Financial Committee, which then makes recommendations to the Board.

5. Nomination Committee identifies and interviews potential board members who bring leadership and expertise to the organization's work.

6. Community Investment Committee sets direction and develops resources to plan, implement, and evaluate the organization's community investment plan.

7. Housing Development Committee meets on the last Wednesday of every month. The committee members provide guidance to housing development staff on housing projects. They also help the staff solve problems and overcome barriers related to projects. When planning a new project, we convene residents and community stakeholders to share their perspective on the project and process to help us shape the project. The residents of the building are involved in the planning stage when we refinance or renovate an existing property. We also seek advice from community stakeholders and interested neighbors to help shape the project. Broader constituencies are engaged when the project is intended to serve special-needs populations.

8. Urban Village Committee (UVC) meets the fourth Tuesday of every month. The UVC is the community planning function of Fenway CDC and provides a platform where the community can monitor and respond to developments that are planned for the neighborhood. The committee is structured to have a single individual assigned to each major development project. Additionally, other UVC members act as peer editors and collaborators. This allows us to respond to the Boston Redevelopment Authority and developers with information received from residents. The UVC chair reports to the Board about the progress of engaging community stakeholders in monitoring and writing comment letters on development projects and participation in public planning meetings.

9. Resident Advisory Committee is comprised of Fenway CDC's tenants who provide feedback regarding the property management and community issues affecting their tenancies.

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10. Fenway Family Coalition is a group of Fenway parents that organizes family events as well as addressing issues affecting families in the neighborhood. The family coalition hosts annual events such as the Safe Trick or Treating, Fenway Family Health Fair, and activities that improve the health, economic, and social wellbeing of residents.

11. Fenway Senior Task Force is made up of senior citizens who advocate for programming and services for Fenway seniors.

Tenant Organizing

Fenway CDC has a long history of supporting tenants to preserve “expiring use” units through community organizing. Our efforts have contributed to the preservation of nearly 600 units of expiring use housing. We are the only neighborhood-based group in the Fenway working to preserve affordable housing for the long term and dedicated to promoting social and economic diversity. Our tenant organizing activities build leadership among the low-income residents and provide the foundation for social justice.

Over the past five years, we have conducted tenant-organizing activities at Burbank Apartments Tenant Association, St. Botolph Terrace, and Our Lady’s Guild House at Charlesgate West in Boston. Our counseling and training support has helped over 140 residents preserve affordable housing, promote tenants’ rights, manage conflicts with landlords, and improve their living conditions. We work with elected-officials, other community organizations and CDCs, Greater Boston Legal Services, Massachusetts Alliance of HUD Tenants, and Metropolitan Boston Housing Partnership to provide stabilizing services to Fenway residents.

Stakeholders Involvement in the Development of the Community Investment Plan

Since its inception, the operations and goals of the Fenway CDC have been built with the assistance and input of residents and stakeholders and have been focused on the needs of those living in the Fenway. Even as we have developed allegiances with other organizations or broadened our scope of services to include other Boston residents, we have worked hard to ensure the needs of Fenway residents were still the primary focus of our efforts.

Fenway CDC’s Community Investment Plan is a combination of input from our Board (Fenway residents and representatives), feedback from residents we serve, and qualitative and quantitative data of our community needs assessment survey and focus group visioning sessions.

In 2012, Fenway CDC began updating the Fenway’s Urban Village Plan and our organization’s strategic plan. (See Section 1 for additional information about the Fenway Urban Village.)

Nearly 200 residents and stakeholders shared their opinions and insights about neighborhood issues via a needs-assessment survey completed in March 2013. When residents were asked what they believed to be the most pressing neighborhood concerns, they most often identified affordable housing and institutional expansion. In addition to the survey, Fenway CDC organized three large community-visioning meetings between January and April 2013 that were attended by over 100 residents and community stakeholders. Data analysis from U.S. 2010 Census, the 2007-2011 American Community Survey, and the results of the needs-assessment survey were shared with attendees and used to guide the development of our Community Investment Plan. Please see Attachment E for more information about the survey analysis and outcome of the focus group visioning sessions.

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Section 3: Plan Goals

Housing Development and Preservation

To date, Fenway CDC has developed nearly 600 units of affordable housing, which constitute 16% of the neighborhood's affordable housing supply. The majority of our housing units are affordable to families and individuals earning 60% or less than the area median income (AMI). We work closely with local institutions, local government, residents, and private developers to forge partnerships and seek out affordable housing opportunities. Our affordable housing contributed greatly to the neighborhood's racial and ethnic diversity, with nearly 60% of our units occupied by ethnically diverse minority residents.

Goal 1: Expand Housing Development and Preservation

During the next five years, the Fenway CDC plans to develop and preserve affordable housing in and beyond the Fenway neighborhood. We will refinance and renovate our Fenway properties located at 71 Westland Avenue and 15-25 Hemenway Street projects. Additionally, we will seek one or two additional properties to add to the Fenway CDC portfolio. We will also continue to seek opportunities to build a pipeline of two to three additional projects in this same five-year period.

Goal 2: Expand Service Area

In July 2013, the Fenway CDC board voted to expand our development area beyond the Fenway to help us meet the challenge of high acquisition costs and competition for locally available property. Enlarging our footprint will allow us to seek out opportunities in other neighborhoods and communities. Our plan is to find and forge collaborations where our experience and skill can add value to the development of a property or enhance a partner's ability to develop. Our expanded service area includes Suffolk, Essex, Middlesex, Norfolk, and Worcester counties.

Benefits to the community include:

- 1) Preservation of an economically diverse community in the Fenway allows people of modest means to live in a safe community close to jobs, public transportation, and amenities.
- 2) Preservation and expansion of the Fenway CDC's real estate portfolio ensures that properties can remain affordable to people of modest means for long term.
- 3) Development of locally affordable housing allows people to remain in neighborhoods they grew up in but can no longer afford to live in.
- 4) Promote economic development through creation of job opportunities in real estate and related industries.

Community Planning and Organizing

Fenway CDC has been at the forefront of community-based planning since the late 1980s with notable success. We have history of collaboration with community residents, area non-profits, issue-specific interest groups, local institutions, elected leaders, and others to build resident engagement and community power to build a more inclusive and sustainable future for the Fenway. As issues emerge from residents, we help connect different constituencies to organize campaigns that address these issues and challenges. Our activities are guided by a diverse and inclusive coalition that includes elders and families of low and moderate-income, immigrants, the disabled, community partners and others.

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The Fenway neighborhood is in the throes of a fundamental transformation. Over the next five years, more than 6 million square feet of new development is proposed for the Fenway neighborhood and the Longwood Medical Area. Large-scale development and institutional expansion are driving our neighborhood to a tipping point with rising rental costs. There are approximately 25 private development projects in process in the Fenway.

In 2002, Mayor Menino signed an executive order requiring developers to provide 12% to 15% of affordable housing onsite. To date, however, none of these developments have fulfilled this requirement. Many developers provide only 7.5% of affordable units on-site and some provide none at all. The average percentage of on-site inclusionary housing units in new residential development since 2006 is approximately 5.6%.¹ With each new development, the Fenway loses more of its affordability. In new and recently approved development in the neighborhood since 2006, we have lost 159 potential on-site affordable units.² Even if all new developments were to provide the full 15% of inclusionary units on-site, the Fenway would still be below the citywide average of 20%.

As stated above, over 40% of Fenway residents have spent half or more of their income on rent. Because of the large number of college and universities in the neighborhood, the Fenway housing market has become inflated. Very few of these educational institutions provide a sufficient amount of on-campus housing for their student population causing increasing pressures on the housing market and reducing housing available to non-students. Since 1990, we have lost nearly 5% of families in the Fenway.³ If this trend continues, lower-income families will no longer have access to a neighborhood that contains critical resources like hospitals, educational and cultural institutions, transportation, jobs, and recreational space.

Fenway CDC's Urban Village Committee is the focus for our planning and development monitoring work. The qualitative and quantitative neighborhood-assessment survey data, focus groups visioning sessions, and strategic community partnerships will guide our future housing and community development work.

Goal 1: Building Community Leadership Capacity

Build community leadership capacity by engaging residents and emerging leaders and empowering them with the knowledge and tools to make positive change in their neighborhood.

Goal 2: Updating the Fenway's Urban Village Plan

Update the Fenway's Urban Village Plan that was created in 1999 by Fenway CDC. This resident-led plan, which features the needs of the community, will be shared with private and public entities when planning and evaluating development proposals throughout the Fenway and comment on them in the City's formal review process.

Goal 3: Equitable Inclusionary Housing Initiative

Fenway CDC has taken the lead on efforts to reform and improve policies and laws/codes to ensure the development and preservation of affordable housing. Of particular note is our success

¹ Fenway CDC Data, 2012. This figure was derived from BRA data on the number of market-rate and on-site inclusionary development units proposed at the time of project approval.

² Fenway CDC Data, 2012. This data was derived from calculations based on the actual number of on-site units subtracted from the potential number of inclusionary units if the entire 15% were developed on-site. Numbers are based on BRA data at the time of approval.

³ Fenway CDC Data, 2012. This figure was derived from 2010 BRA data plus the 173 expiring-use units that were converted to market-rate in 2011.

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in moving the Inclusionary Housing Development fund from the Boston Redevelopment Authority to the Department of Neighborhood Development to ensure transparency in the use of those funds and proper tracking and auditing. We continue to strive to further our work on behalf of low and moderate-income residents to ensure affordability in all neighborhoods of Boston and the surrounding areas.

Goal 4: Tenant Organizing

Improve the quality of life of residents through education and creating collective power by working together in groups, unions, associations, and coalitions.

Benefits to the community include:

1. Residents and stakeholders are empowered to contribute insights and perspectives about neighborhood issues.
2. Fenway CDC provides training, knowledge, and resources so residents can independently make positive changes to their neighborhood and improve their quality of life.
3. Develop a healthy, safe, cohesive and thriving neighborhood with economic opportunities for residents, businesses, and institutional partners.

Resident Services

Our workforce development program “Walk to Work” and Resident Services enhance the ability of our residents to pursue goals, maintain stable housing, overcome barriers to success, achieve self-sufficiency, and improve overall quality of life. Through housing counseling and social service support, we empower residents to achieve self-sufficiency and maximize their full potential. The Fenway Family Coalition provides positive role models to youth and support to families and parents raising children and teens in the Fenway. We organize financial literacy, health, educational and cultural events, and activities to improve the wellbeing of residents. Many of these services are provided on site and with multi-lingual options that reflect the diversity of our residents.

Goal 1: Life Stabilization and Wellbeing

Participants will attain the life conditions needed to enable them to take steps toward greater economic stability and wellbeing.

Goal 2: Education and Employment Skills/Job Readiness

Participants will gain the job skills and educational credentials needed to secure and retain living wage employment.

Goal 3: Economic Stability

Participants will increase their job-readiness skills, which will enable them to participate successfully in the labor force.

Goal 4: Tenant Advocacy Services

Participants will have access to social benefits and ongoing case-management and service referrals.

Benefits to the community include:

1. Promote economic development by helping residents to advance their education and secure jobs that increase their standard of living.
2. Help residents develop greater economic self-sufficiency and reduce their need for government assistance.

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3. Reduce population of homeless individuals and families in Boston by educating residents about the barriers to maintaining adequate, affordable housing.

Section 4: Activities to be Undertaken

Housing Development and Preservation Activities

1. Pipeline Cultivation

This is an ongoing effort. We are speaking and meeting with local institutions, other CDCs, for-profit developers, brokers and property owners regularly to seek out new development and joint-venture opportunities. This will permit us to target properties to purchase and work with the owners to agree on an appropriate purchase price. We are also mobilizing our Board, members, and neighbors for insights, connections, and political support in this work.

2. Community Cultivation

To expand our potential pipeline outside the Fenway neighborhood, we have begun exploring possible areas where there is openness to the Fenway CDC and our experience, and have begun conversations with municipal and community leaders. This work will involve the board and staff. Wherever possible, we will focus on development in contiguous communities but will evaluate each new development opportunity individually and with input from residents, community stakeholders, and professional consultants (as needed).

3. Development Financial Modeling

In conjunction with the housing pipeline cultivation, we will develop a range of financial models and housing scenarios that are appropriate for a variety of possible properties. This will be an ongoing process.

4. Community Organizing

The Fenway CDC Housing Department will work closely with other stakeholders such as abutters and residents of properties targeted for acquisition to build support for the project. Housing and civic engagement staff will engage these important community resources to ensure our projects are financially and socially successful.

5. Team Assembly

We will work with a core group of architects, contractors, and development consultants to help us evaluate projects for acquisition and plan most cost efficient building and energy designs for renovation and construction.

6. Funder Cultivation

We will maintain on-going conversations with lenders and funders about the future of Fenway development opportunities as well as our efforts to start a development pipeline outside our traditional boundaries.

Community Planning and Organizing Activities

Activity 1: Building Community Leadership Capacity

- 1.1 Conduct leadership-training sessions for residents and organize community meetings.
- 1.2 Collaborate with institutions for service learning programs to involve students in our programs and activities to create positive community impact.

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Activity 2: Building Fenway's Urban Village Plan

The Fenway's Urban Village Committee has four working groups and will work with Fenway CDC's Community Planner to produce the Urban Village Plan, a living document targeted to developers and elected officials who do business within the Fenway neighborhood. The plan will reflect the current composition and state of the neighborhood, inventorying the new developments and policies that have been built and adopted, respectively, since the last update in 2009. Fenway CDC's Community Planner manages the engagement of the working groups comprising of residents and community stakeholders who are involved in the planning, organizing, leading, and controlling of the following activities to achieve the community's common vision and goals.

- 2.1 *Institutional Impact Working Group*: Monitor institution and private developments and mitigate any negative impact on residential area to prevent rising housing costs, displacement of residents, and diminishing local services.
- 2.2 *Affordable Housing Working Group*: Form partnerships to create sufficient and varied housing supply that promotes diversity and equal opportunities in the Fenway.
- 2.3 *Community Space, Open Green Space, Arts and Culture Working Group*: Form partnerships with neighborhood institutions to provide community space and facilities for residents to improve their social and wellbeing.
- 2.4 *Transportation and Access Working Group*: Identify transportation options for residents and working population in the Fenway neighborhood and improve accessibility for disabled people.

Activity 3: Equitable Inclusionary Housing Initiative

- 3.1 Continue to strengthen relationships with nonprofit partners, private developers, elected officials and the Boston Redevelopment Authority.
- 3.2 Leverage partnerships to make concrete changes in the Inclusionary Development Policy.
- 3.3 Forge partnership with private developers that Fenway CDC could be owner or lessor of the Inclusionary Development Policy units that the developers provide onsite.

Activity 4: Tenant Organizing

- 4.1 Build leadership among the low-income residents and provide the foundation for social justice by conducting training, counseling and training support to help them preserve affordable housing, promote tenants' rights, manage conflict, and improve living conditions.

Resident Services Activities

Activity 1: Life Stabilization

- 1.1 Participants will access social benefits or services with assistance from our Resident Services staff to ensure residents are receiving all benefits for which they are eligible.

Activity 2: Education and Employment Skills/Job Readiness

- 2.1 Each participant will develop a professional résumé and cover letter, complete 20 hours of job searching per week, and participate in 1 to 3 hours of employment counseling. For example, participants may receive services related to interview preparation, how to apply for jobs, job readiness skills, placement assistance, etc.

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Activity 3: Economic Stability

- 3.1 Fifty percent of the participants will secure employment. Participants will increase number of hours worked and/or increase their hourly wages. Residents who do not gain permanent employment will register with a temporary placement agency.

Activity 4: Tenant Advocacy Related Services

- 4.1 Participants will make tangible progress towards completing the tenant education, financial literacy workshops, life skills workshops, and home-buying workshops to develop healthy habits, improve money management skills, and learn how to deal with life's adversities more effectively.

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

Fenway CDC maintains records of all of the work we conduct both with residents and with non-residents and records related to property acquisition and management. Because much of our funding is secured through public and private grants, we are experienced at reporting data on a regular basis to demonstrate the ongoing nature and effectiveness of our work. We understand the importance of ensuring that our goals are specific, attainable, and measurable. Fenway CDC will provide results data as required for securing CITC funding.

Housing Development and Preservation

Our housing development and preservation work will be measured by the number of people housed, the number of housing units preserved or created, the quality of asset management to ensure residents have safe and affordable homes, and the number of community, institutional and private development partnerships developed.

Community Planning and Organizing

Our community *planning* efforts will be measured by the number of positive community outcomes achieved, the number of resident leaders trained, and the number of successful community partnerships forged for project development.

Our community *organizing* efforts will be measured by the number of service-learning programs continued or created in partnership with local institutions, the number of resident leaders trained the number of at-risk residents benefitted from tenant organizing work, and the advancement of our Inclusionary Housing Policy work (as noted in Section 3, Goal 3).

Resident Services

Life Stabilization work will be measured by the number of participants who are able to access one or more social benefits services (e.g., Food Stamps/WIC, Housing Vouchers, SSDI, Health Insurance/Medicaid, Fuel Assistance, Childcare Vouchers and Providers, etc.).

Our work in education and employment skills/job readiness will be measured by the number of participants who develop professional résumés and cover letters, who complete 20 hours of job search per week, and who attend 1 to 3 hours of employment-related counseling sessions (e.g. interview preparation, how to apply for jobs, information about basic skills necessary for employment, placement assistance, etc.).

Economic Stability work will be measured by the number of participants who secure employment, who increase the number of hours worked or increase their hourly wage, or who register with a temporary employment agency.

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Our success with Tenant Advocacy will be measured by the number of participants who make tangible progress towards completing the tenant education, financial literacy workshops, life skills workshops, and home-buying workshops to develop healthy habits, improve money management skills and learn how to deal with life's adversities more effectively.

Section 6: Collaborative Efforts to Support Implementation

Housing Development and Preservation

As noted in Section 1, Fenway CDC has developed and maintained positive relationships with the surrounding hospitals, colleges, and universities to develop programs that provide civic engagement and service-learning opportunities for students and employee-development programs for workers in those institutions. We plan to build on those relationships to develop workforce housing that is affordable to the employees at the lower end of the pay scale at these institutions. We also seek to acquire property that these organizations consider extraneous. These partnerships could result in affordable housing that serves the mission of Fenway CDC and the institutions themselves.

We plan to collaborate with for-profit developers as they build larger, modern residential towers in the Fenway community. We would like to work with them to provide more affordable units to maintain the neighborhood's desired level of 15% of housing at affordable levels (this also aligns with Mayor Menino's executive order regarding affordable housing as discussed in Section 3). We will continue to work with community leaders (municipal officials, community advocates, real estate advisors, community residents, etc.) as we seek new opportunities beyond the Fenway borders. Fenway CDC will build its name as a champion for affordable housing in communities in which the organization is currently unknown.

Community Planning and Organizing

Fenway CDC's community planning and organizing work will continue to involve residents and stakeholders heavily such as institutional partners, neighborhood business owners, working professionals, non-profit partners, and elected officials. Residents and stakeholders will be involved through civic engagement and community meetings to plan and participate in making changes for the neighborhood.

As part of the grassroots planning initiative, the Fenway's Urban Village Sub-Committees (Housing, Institutional Impact, Transport and Access, and Community Space) comprised of residents and stakeholders will continue updating the Urban Village Plan through ongoing community meetings. Fenway CDC will impart knowledge and tools (framework, process, system, and policies) to empower our residents and stakeholders to make positive changes in the neighborhood.

Resident Services

Fenway CDC has developed partnerships and collaborations with the following local non-profits and other Community Based Organizations: ABCD Parker Hill/Fenway Neighborhood Service Center, Career Link, Jewish Vocational Services, Children's Hospital, Brigham and Women's Hospital, YMCA International Learning Center, Career Collaborative, United South End Settlements, Northeastern Center of Community Service and The Work Place. These partnerships create a network of support throughout Boston. These partnerships also provide localized career and life-stabilization services to Fenway residents as well as helping residents secure the training and employment services necessary to secure employment in the Boston area and ensure long-term success in their fields.

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

Community Vision

The Fenway CDC adopted the Urban Village Plan in 1999 as its guidelines for evaluating proposed development along Boylston Street. That same year, the Red Sox released a plan to construct a new 44,000-seat baseball stadium. Fenway CDC sponsored two public meetings to gather input for use in updating the plan vision. With those changes—primarily intended to encourage economically feasible development—the Urban Village Plan emerged as a compelling, alternative vision to the ballpark proposal. The revised plan was presented in August 2000 at a community charrette that was jointly sponsored by the Fenway CDC and the preservation group *Save Fenway Park!*

The plan has grown to become a central component of Fenway CDC's mission to promote neighborhood stability and inclusiveness. It won the support of City Hall, private developers, and nearby institutions. Fenway CDC has shaped its programs and projects to advance the Urban Village Plan, which also provides the criteria by which we evaluate development proposals throughout the Fenway and comment on them in the City's formal review process.

In 2008, Fenway CDC measured progress toward the goals spelled out in the Urban Village Plan through hiring an outside agency to provide a report card of our activities related to the development of the Fenway Urban Village. The full Urban Village Report Card is available on Fenway CDC's website, www.fenwaycdc.org or in print by calling for a copy. Through continued implementation of the plan, the Fenway CDC aims to transform the neighborhood into an urban village—a self-sustaining environment where people can live, work, shop, and entertain in a single urban area. In 2012, Fenway CDC began to update the Urban Village Plan by engaging residents and community stakeholders in our Neighborhood Needs Assessment and Visioning Focus Groups.

Community Strategy

Fenway CDC continues to build community leadership capacity by conducting community meetings and trainings for residents and stakeholders in the following five working groups.

- 1) Affordable Housing: A sufficient and varied housing supply
- 2) Transport and Access: Increase public transportation and improved access for the disabled
- 3) Community Space, Open Green Space, and Arts & Culture Working Group: Improve community facilities and access, maintain open green space, and provide access to local cultural institution
- 4) Institutional Impact: Mitigate the risk of gentrification which may displace residents
- 5) Business Community: A healthy business community serving local residents and visitors, while providing employment opportunities

Interaction and Interrelation of Activities with Larger Community Vision and Strategy

Fenway CDC's Community Investment Plan activities are aligned with the Community Vision and Strategy through our partnership with residents and stakeholders, integration of processes and sharing of resources. We also ensure that our activities are aligned with the work of the Department of Housing and Community Development, the Massachusetts Association of Community Development Corporations, the Metropolitan Area Planning Council, and Health Resources In Action, an organization that aims to improve healthy lives and sustainable communities.

Our community planning and housing development program activities address affordable housing, mitigating impact of institutional expansion, development of neighborhood businesses, community

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safety, quality of life improvements, homeownership, gentrification, and protecting assets from predatory lending practices. These issues are critical in transforming our vulnerable Fenway neighborhood into a strong, viable community. Our workforce development program collaborates with social service and community organizations to improve job access and quality employment for low-income residents. Our Resident Services focus on maximizing income and increasing residents' future financial assets and the wealth of low-income families. We provide housing counseling, training on financial literacy, provide information on affordable consumer financial services, and assist residents in planning for future home ownership. We also provide services that help residents build, repair, and leverage credit as well helping locate affordable housing.

Our CIP is consistent with other neighborhood, community, and regional plans.

Fenway CDC's Community Investment Plan is designed to complement or build on the vision found in documents that the city has produced to shape the neighborhood's zoning and streetscape. These include the East Fenway Neighborhood Strategic Plan (2003), Land Use and Urban Design Guidelines for the West Fenway Special Study Areas (2002), and the Fenway Neighborhood Transportation Plan (2001).

Fenway CDC ensures that our CIP goals and outcomes are strategically aligned with the work of the Department of Housing and Community Development, the Massachusetts Association of Community Development Corporation, the Metropolitan Area Planning Council, and many other CDCs in the commonwealth of Massachusetts. Through continuous collaboration with stakeholders and residents, we believe we can leverage our community network, resources, and knowledge to help residents live longer lives and build a prosperous economy.

Section 8: Financing Strategy

Over the next five years, Fenway CDC will finance its activities with a multipronged approach as it has in the past. During the past few years, Fenway CDC collected development fees during the refinance of several of its existing housing properties. With those fees, we were able to establish board-designated reserves to sustain us through the years when development fees are not projected. In our five-year financial projections, Fenway CDC anticipates that it will be able to maintain a consistent level of asset management fees and collection of deferred development fees from our housing properties. We will refinance and renovate two of our existing properties that will provide additional fees and income and allow access to Community Housing Developing Organization (CHDO) funds. We have used conservative projections for grant funding, contract fundraising, grassroots fundraising, and development fee funding sources. Our projections also include staffing and expenses similar to what we have maintained for the past several years. With a CITC award, we propose increasing our housing staff and capacity to fund pre-development activity in pursuit of affordable housing development projects. Please see Attachment F for more information about the financial projection of our community investment.

Strategy 1: Expand Real Estate Projects

A portion of our reserves has been set aside to allow us to support a real estate development team while we pursue new affordable housing development opportunities. With the expansion of our development area beyond the Fenway, our goal is to achieve at least one new developer fee within the next five years. Developer fees from the planned re-finance of two of our existing properties will also provide a source of income. Real estate projects will be funded through the traditional channels of acquisition, pre-development, construction, and permanent financing. We will seek additional grant funds as appropriate for each project. On occasion, we may engage in fundraising

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for project-specific developments. Fenway CDC has experience in assembling financing for projects and relies on development consultants for additional expertise. Fenway CDC has a strong 40-year history of developing affordable housing, having created or preserved nearly 600 units in 11 projects with financing through city, state, federal, and private sources.

Strategy 2: Expand Funding Sources

We will focus our fundraising efforts on expanding existing sources of grassroots fundraising through our successful annual Fenway Ball and Fall events that have been stable sources of unrestricted income for the last 10 years. We will strengthen relationships with funding sources that may potentially benefit from tax credits offered through the CITC Program.

Strategy 3: Strengthen and Increase Existing Funding

We will use our existing program successes to convince existing corporate and foundation funders to continue to expand their grant funding. As in the past, we will work towards broadening our grant funder base by continuing to demonstrate that our programs are making a positive community impact and can serve as a model for other communities. Fenway CDC will have financial support for its resident services work from Boston Children's Hospital's Determination of Need funding through 2017 and Community Development Block Grant funding via the City of Boston Jobs & Community Services (CDBG-JCS) through June 2014. The Walk to Work Resident Services program has had a 10-year history of CDBG-JCS funding due, in large part, to the impact Fenway CDC's services have provided to the community. Our Community Planning and Organizing activities have been supported for the last decade through a combination of foundation grants ranging from \$10,000 to \$100,000 from Citizens Bank, the State Street Foundation, the Boston Foundation, the Herman and Frieda L. Miller Foundation, the Mabel Louise Riley Foundation, the Surdna Foundation, the Massachusetts Housing Partnership, the Community Economic Development Assistance Corporation (CEDAC), and the Hyams Foundation. Fenway CDC's unrestricted income from fundraising events and housing fees have supplemented grant funding for Community Planning and Organizing.

Strategy 4: Improve Operational Efficiency

We will continue to expand our service-learning program with local colleges and university to utilize students who contribute their time and talents in our work. We will deepen our community engagement with donors and funders through traditional relationship development and social media. We will also utilize our donor database to capture, track and analyze fund development data and formulate strategies to increase funding from a variety of sources.

Section 9: History, Track Record, and Sustainable Development

Fenway CDC was founded in 1973 as a response to a string of threats to the neighborhood:

- A flawed urban renewal plan
- An arson-for-profit ring that claimed five lives
- Pressures from institutional expansion, widespread condo conversions, and displacement
- The elimination of rent control in a context of rapidly rising housing costs
- Plans for the construction of a large baseball stadium in the residential area

Fenway CDC mitigated the impact of those crises and found opportunities to strengthen the community while expanding programs and services to aid the low and moderate-income families and individuals living in the neighborhood. Fenway CDC carries on this work today and continues to be a stabilizing presence in the community.

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Track Record of Past Practices and Approaches to the Financing and Implementation of Proposed Activities

Housing Development and Preservation

Fenway CDC began developing and preserving affordable housing 40 years ago. Today, we build on our history of identifying properties, community needs, partners, and funding sources that have allowed us to improve the lives of residents and build community. Fenway CDC has financed its housing development and preservation activities over the years through funding from partnerships with public and private entities. Since our inception, we have accomplished the following in our housing development and preservation efforts:

- Developed and preserved nearly 600 mixed-income homes for approximately 1,500 residents
- Created the first housing in the U.S. set aside for people with AIDS and HIV
- Long-term investment in the local community through Fenway CDC's continued ownership and community focused management of the property

Community Organizing and Planning

Fenway CDC was founded by community activists who resolved community-planning issues. Community Organizing and Planning have always been central to Fenway CDC's mission and have remained a cornerstone of its activities. Since our inception, we have accomplished the following:

- Trained resident leaders with the knowledge to plan and implement community-oriented activities to improve their neighborhood and quality of life of residents
- Involved residents to develop and promote a plan for the development of an "urban village" in the Fenway that includes development of 2,000-3,000 units of mixed-income housing and a community center
- Led a campaign involving residents to prevent the demolition of Fenway Park and initiating a charrette where nationally known architects, planners, and engineers worked with the community to devise renovation plans. Many were later adopted by the Red Sox
- Engaged residents and community stakeholders in a campaign to save Bus 55 from being eliminated by the MBTA in West Fenway for two consecutive years. This benefitted our residents, neighborhood employees and many visitors, who come from other neighborhoods to the Fenway to learn, work, or play.
- Engaged residents and community stakeholders to share their voices to ensure that Northeastern University increases their student dormitories beds from 0 to 600 in their 10-year master plan. This helps to prevent displacement of residents due to transient students in the neighborhood and escalating rental costs.
- Collaborated with community stakeholders to promote the improvement of the Inclusionary Development Policy (IDP) to improve affordability in citywide neighborhoods and saw success when the Mayor authorized the transfer of \$29M of IDP funds from the Boston Redevelopment Authority to the Department of Neighborhood Development.

Economic Development

- Since 1994, Fenway CDC has partnered with the employers in the Longwood Medical and Academic Area to form the "Walk to Work" program. This program was established out of a need for free career counseling, job placement, education and training referrals, and career advancement services for Fenway residents with no other resources available to them. We have placed over 500 low and moderate-income job seekers into a wide range of jobs in occupational and industrial sectors.

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Resident Services

- Fenway CDC has served over 2,000 residents through counseling, referral services and case-management related to housing, education, job, health and financial issues.

Senior Programs

- Fenway CDC formerly operated the award-winning Peterborough Senior Center, which provides over 100 sessions of health, educational, cultural, and recreational activities to improve the social and wellbeing of senior citizens. Fenway CDC continues to house, serve, and advocate for the needs of all of the Fenway's low and moderate-income residents, including seniors, and plans to work closely with the PSC and its members toward that mission.
- Over 200 Fenway seniors in computer applications in the last eight years at our computer-learning center and through private tutorials at the senior center.
- Prevented the displacement of nearly 200 seniors in the aftermath of rent decontrol.

Fenway Family Coalition

- In 1994, Fenway CDC launched the Fenway Family Coalition (FFC) in response to the isolation and lack of support that Fenway families experienced. FFC is a constituency-led initiative that provides families and children with educational, health and cultural activities. Annually, FFC works with over 30 local businesses annually to sponsor family-oriented community events such as the Safe Trick or Treat Halloween Party.

Personal Financial Management

- In 2012, Fenway CDC formed a partnership with American Consumer Credit Counseling to conduct financial literacy education workshops and provide educational resources for low-income residents. This program seeks to help the low-income residents acquire the knowledge needed to overcome barriers to moving out of poverty and to become economically self-sufficient. They learn financial management skills such as creating fiscal goals, developing budgets, savings, and debt management.
- Our financial literacy workshop trainers in 2013 include Sovereign Bank and the Urban League of Massachusetts. Fenway CDC has also forged partnership with Webster Bank to bring home-buying information workshops to educate residents about the importance of building financial assets for their future.

Sustainable Development

Fenway CDC's work is consistent with the Commonwealth's Sustainable Development Principles in the following ways.

Concentrated Development and Mixed Uses

Fenway CDC's real estate development projects are located in a dense urban neighborhood of Boston. The projects all exceed the highest LEED standard of 10 units per acre. The Fenway is a lively, mixed-use, transit-oriented neighborhood. Residents are well served with needed services very close by. They can walk to banks, restaurants, grocery stores, daycares, community centers, cleaners, libraries, pharmacies, schools, and health care providers.

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Advance Equity

Our projects are more diverse than the Fenway neighborhood as a whole, although slightly lower than the City of Boston. We continue to seek minority residents by advertising in non-English publications and those read by minorities.

Make Efficient Decisions

Fenway CDC prides itself on the civic engagement of its members and residents of its buildings. Part of our mission is to empower people and to help them find their voices around issues that affect their lives. This means that we also involve residents and neighbors when we develop projects. As a result, our decision-making is not always the most expedient. Participation of those directly involved, such as building residents or abutters, does help make our projects go more smoothly. People who feel ownership in the actions taken are less likely to protest or stop development.

Protect Land and Ecosystems

To date, our projects have involved acquisition or building on currently developed site in the Fenway neighborhood of Boston. We understand and value the importance of “green spaces” within a large city like Boston and the value of parks to residents and families as well as visitors.

Provide Transportation Choice

Our projects are located in a mixed-use, transit-oriented community with pedestrian access to nearly every basic service within a half mile of the site.

Increase Job and Business Opportunities

Our Fenway projects preserve housing near the Longwood Medical Area, a major employment source in Massachusetts. These projects will create jobs during the construction phase and preserves the employment of the property management staff who support the sites and residents.

Promote Clean Energy

All of our properties have recycling bins, and we use software to monitor the monthly energy use of all of our properties. We have installed energy efficient retrofits into all our properties, and solar thermal systems have been installed on three properties with plans for two more.

Plan Regionally

The *2008 MetroFuture Regional Plan* issued by the Metropolitan Area Planning Council (MAPC) provides guiding principles for Fenway CDC’s work. Fenway meets the ideal for the future envisioned by MAPC: it is a dense development in an already developed neighborhood, well served by infrastructure. Shops and other basic services are walking distance away. It is already well served by public transportation. There is nearby open space for passive and active recreation. *MetroFuture* defines this as a “more sustainable form of development due to energy-efficient housing types and compact development patterns that are readily served by transit.” *MetroFuture* promotes future housing equity, by suggesting that low-income households should “be able to find affordable, adequate conveniently-located housing... and they will be able to avoid displacement.” With Fenway CDC’s expansion into other communities, we expect to embrace the same principles as we develop affordable housing in a wider footprint.