

## **Section II. Metro West Collaborative Development's Community Investment Plan**

Metro West Collaborative Development (Metro West CD) is a regional community development corporation that has a geographic focus comprising 21 towns in the Metro West area. Additional contiguous towns may be added by vote of the Board of Directors as needs and opportunities emerge. The major goal of this Community Investment Plan is to undertake activities that help these communities reach and maintain their 10% affordable housing goal as defined under the Commonwealth's General Law Chapter 40B and tracked on the Subsidized Housing Inventory (SHI). This goal is the result of a slow and steady march towards regionalization of the work of Metro West CD, the growing need within our target communities and the fostering of the political will to begin to address the inequity of an insufficient supply of affordable housing in most of the Metro West communities. The attached "Fair Share Gap" map (included in Section 5) produced by MAPC vividly shows the failure to provide affordable housing for low-income households in the Metro West region

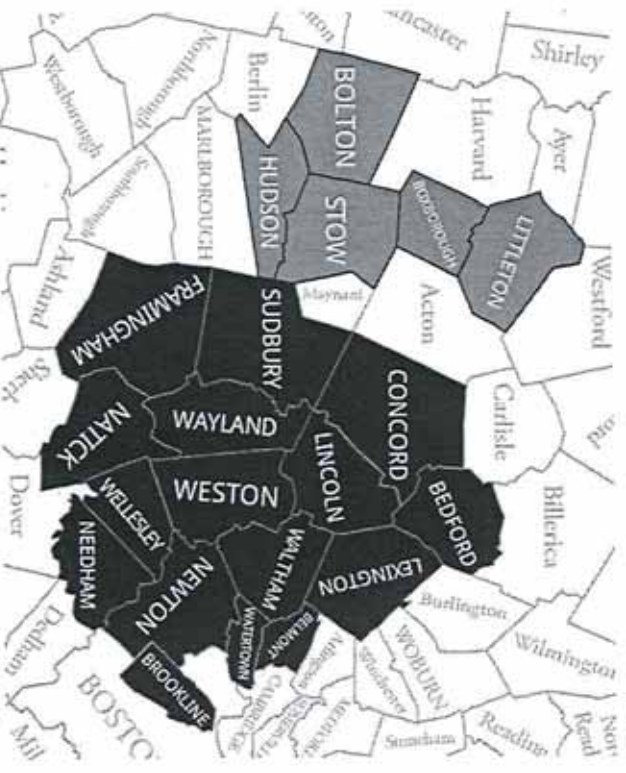
### ***Section 1: Community to be Served***

Metro West CD's primary focus area includes the 21 towns shown below:

Within those communities Metro West CD works with a broad range of residents and businesses of all types and incomes as well as a variety of organizations and institutions to identify and prioritize each community's housing concerns and goals. The outcomes, including both services and housing development, primarily serve low and moderate income households.

Metro West is one of the Commonwealth's most wealthy regions and housing prices reflect that. The Metro West cities and towns are "high opportunity" communities where low-income people want to live. These communities have more than 174,000 jobs filled with workers earning less than \$36,000/year. Collectively, our 21-town focus area includes:

- 574,474 people
- Approximately 80% of residents are white; 10% Asian; 3% Black/African and 6% Latino
- 15% of residents are over 65 years old
- 5% (about 29,000 families) earn less than \$25,000/year



Metro West CD programs tend to serve a more diverse constituency. An analysis of our Ready Renter program at the end of 2013 showed that of the 126 applicants who self-reported their race:

- 39% are White/Caucasian
- 36% are Black/African-/Caribbean-American
- 10% are Latino/a
- 9% are Mixed/Another Race
- 6% are Asian/Native Hawaiian/Pacific Islander

### ***Section 2: Involvement of Community Residents***

Metro West CD actively involves residents and uses a variety of mechanisms for involving community residents in the organization.

Tracking / Responding to Callers: Metro West CD receives over 2,000 calls per year from individuals and families with questions about housing and other matters. We provide information and referrals to all callers and track their area of concern. In 2013 we received the following inquiries:

- 466 calls inquiring about senior housing / senior issues
- 2,165 calls inquiring about rental housing
- 173 calls inquiring about home ownership housing

Community Surveys: Annually, Metro West CD surveys a subset of the 21 towns. The subset is chosen by the Board of Directors based on anticipated opportunities for housing development or housing policy improvements. The purpose of the survey is to a) gather information about the concerns and goals of respondents and b) identify potential supporters and leaders to become involved in the organization. (Sample survey included in Section 5).

Community Meetings: Throughout the year Metro West CD convenes community meetings and workshops on various topics for the purposes described above in the Survey section.

Liaison to Housing Trusts & Partnerships: Metro West CD staff members regularly attend the meetings of Housing Trusts and Partnerships throughout the 21-town region. Some relationships are more formal (such as the four-town CHDO contract between Watertown, Natick, Lexington and Belmont) and others are more informal such as with the communities of Lincoln, Wayland and Needham. These meetings provide regular guidance and feedback to the Metro West CD staff on the issues and opportunities within each community.

Committees: Community members are identified through these meetings and surveys as potential leaders and invited to serve on one of Metro West CD's committees, where they can provide more regular input, guidance and assistance to the staff and Board of Directors. Current Committees include: Planning and Development, Finance, and Personnel.

Board of Directors: Metro West CD's Board of Directors is comprised of up to 15 members who represent broad geographic, ethnic, racial, and economic constituencies.

### ***Section 3: Plan Goals***

The goal of this Community Investment Plan is very simple, but very ambitious. Metro West CD seeks to assist the towns in our 21-town region in reaching and maintaining the Commonwealth's Chapter 40B goal of 10% affordable housing stock. The total number of affordable units needed to meet the goal in our 21 town focus area is 4,977 units. The breakdown of towns and their affordable units needed to meet the 10% goal is included in Section 5.

Success in reaching this goal directly benefits the families and individuals who obtain the affordable housing. Affordable housing provides a stable, healthy environment for families and individuals to be best positioned to succeed as members of their community including job and school performance and improved health outcomes. The community benefits by reaching the 10% affordable housing goal in several ways:

- 1) Meeting the 10% goal helps prevent "unwelcome" 40B projects.
- 2) Increased housing affordability creates more opportunities for existing families to stay within the community as their economic situations shift over time.
- 3) New affordable housing units creates diversity of incomes, races, and ethnicities.
- 4) Affordable housing development can be a tool to stimulate additional economic development in underutilized or blighted neighborhoods.
- 5) Providing housing opportunities along transit nodes and in commercial centers can incentivize new business development.

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

Metro West CD will help towns within its geographic area to meet the 10% affordable housing goal by doing three things:

- 1) Build and preserve affordable housing – Metro West CD builds, owns and operates affordable housing

Metro West CD has developed 57 units of affordable housing in four different properties. Each of these projects involved the acquisition and rehabilitation of substandard buildings and the marshalling of millions of dollars from public and private funding sources. In 2012 Metro West CD began a campaign to develop 100 units of affordable housing over five years. Twenty-five units have been completed. Metro West CD is currently in negotiations with the owners of five parcels, some of which will be the locations for the next 75 units:

- Watertown: Metro West CD seeks to develop approximately 40 rental units and commercial space on a former industrial site.
- Natick: Metro West CD, in partnership with Family Promise Metro West, seeks to build approximately 40 rental units in a former church-school building. The project would contain units for formerly homeless families.
- Waltham: Metro West CD seeks to redevelop a contaminated mill building into approximately 35 rental units.
- Belmont: Metro West CD seeks to construct 20 new rental units on a former dairy manufacturing site.
- Harvard: Metro West CD is the chosen developer to construct approximately 30 rental units on town-owned land. A Local Initiative Program application is currently being prepared for submission to the ZBA in December.

In addition to building affordable housing, Metro West CD assists municipalities in their efforts to preserve and maintain their affordable housing stock through the monitoring of deed restrictions. Metro West CD is an approved MassHousing 40B compliance monitor and has recently been hired by a consortium of five communities (Bolton, Boxborough, Hudson, Littleton and Stow) to provide a variety of “affordable housing” consulting services.

In 2015-2016 Metro West CD will develop 75 units of affordable housing:

- Negotiate with owners to obtain site control of three sites for the construction of 20+ units per site.
- Submit zoning and financing applications for each of these sites in order to assemble the components required for the projects’ advancement.
- Hire general contractors for each of the three sites.
- Begin construction in fall 2016.

In 2015-2016 Metro West CD will provide housing consulting and monitoring services to seven municipalities and five 40B projects resulting in the creation of 40+ new affordable housing units.

- 2) Advocate for affordable housing – Metro West CD works with local housing advocates to promote public policies and programs that increase the availability of affordable housing

Since its inception, Metro West CD has been a leader in advocating for affordable housing requirements within local zoning, fighting for greater resources for affordable housing and supporting community leaders as they advocate for affordable housing. Metro West CD has also responded to changing community needs over the years by convening discussions, facilitating networks of civic groups and providing educational opportunities. Most recently Metro West CD lead a group of advocates to win an amendment to Watertown’s Inclusionary Zoning Ordinance increasing the percentage of affordable housing required.

In 2015-2016 Metro West CD will:

- Work with local Housing Trusts and Partnerships to support local Housing Production Planning efforts, Master Planning efforts, Inclusionary Zoning improvements, Community Preservation Act campaigns and other initiatives that promote affordable housing through new or improved local policies and programs.
  - Convene 5-10 affordable housing training sessions attended by 100+ individuals, which will provide information about affordable housing opportunities and also identify new community advocates.
- 3) Connect people to affordable housing – Metro West CD facilitates and administers several programs the help low and moderate income people access affordable housing opportunities

When faced with a looming housing crisis most people don’t know how to start or where to turn. Metro West CD provides information, referrals and one-on-one guidance to first time home buyers, tenants and landlords. Last year we responded to more than 2,000 calls from individuals and families seeking support with their housing challenges. Support ranges from formal training and workshops, to mailings/bulletins or one-on-one counseling sessions.

In 2015-2016 Metro West CD will:

- Provide in-depth counsel to 100 tenants in their efforts to obtain or keep affordable housing.
- Maintain the Ready Renter Program, which serves 200+ households seeking affordable housing. Through this program we provide monthly bulletins and one-on-one support so that individuals and families can find out about housing opportunities and put their best foot forward in trying to obtain it.
- Provide basic information and referrals to more than 2,000 people who call the Metro West CD office with housing questions.

### ***Section 5: Measuring Outcomes***

Because the goal is simple, measuring the outcomes will be simple: units added to the SHI. Annually, Metro West CD will report to its members, donors, supporters and all other interested parties the progress that has been made within each of the 21 towns in our focus area. Additional outcomes will include:

- Adoption of one new program or policy that creates new affordable housing
- 5-10 Affordable Housing Training Sessions attended by over 100 people.
- Administration of a Ready Renter Program that serves over 300 people.
- Responding to over 2,500 calls from individuals with housing related questions.

### ***Section 6: Collaborative Efforts***

With a staff of only four and a geography of 21 towns, Metro West CD must work through collaborations. As mentioned above, we work closely with each of the existing Housing Trusts and Partnerships in our geographic region to identify opportunities and promote housing goals. Metro West CD also works with local non-profits and municipal governments to accomplish housing goals. Some examples are noted below:

- Belmont Housing Trust – currently helping the BHT design a homebuyer assistance program to help low income households purchase homes in Belmont.
- Family Promise Natick – currently part of a coalition of Natick-based groups working to identify a site for the Town’s first 100% affordable housing development since the 1970s.
- LexHAB Lexington – a local all-volunteer organization that has developed 50+ units over the past 30 years has begun to tackle larger scale projects for which they don’t have all the experience they need and hired Metro West CD to consult on their first LIP housing development.
- Housing Services Collaboration – The five towns including: Bolton, Boxborough, Hudson, Littleton and Stow joined forces to hire the housing help that each community couldn’t afford on its own. They selected Metro West CD because of the variety of services we could offer. Although initially driven by concerns about their SHI compliance, these five communities are now looking forward to proactively meeting affordable housing goals. Metro West CD is working with the Town of Hudson on the identification of housing development sites in downtown Hudson and the Town of Boxborough to update its Housing Production Plan.

## ***Section 7 Integration of activities with community strategy***

The desire to meet or maintain the 10% affordable housing goal is often cited in Master Plans or Housing Productions Plans of the communities Metro West CD works in. A sample of these plans is attached. Our analysis of these plans has led us to important real estate development strategy that prioritizes the following:

- Reuse of industrial and commercial sites.
- Mixed-use developments that would include residential and commercial spaces.
- Cluster zoning and “friendly 40Bs.” A friendly 40B is the use of a provision of State Law Chapter 40B that allows towns to work with a developer to accomplish specific affordable housing goals and may, through that process, circumvent local zoning codes.
- Shared sites with housing, open space, community farms and bike paths.

### ***Section 8 Financing Strategy***

Metro West CD has been slowly growing its budget, program and staffing over the past five years. With several real estate projects and multiple consulting contracts under its belt Metro West CD is able to obtain a significant portion of its operating budget from program income.

- Metro West CD earns approximately \$50,000 from contracts with municipalities and private developers to assist them in complying with affordable housing regulations.
- Metro West CD has earned over \$700,000 in developer fees since 2010 for the production of affordable housing. These projects have leveraged over \$10 million in public and private resources including: Low Income Housing Tax Credits, 4% bonds, other DHCD subsidy programs, Federal Home Loan Bank of Boston’s Affordable Housing Program, local HOME funds and private mortgages from local banks.

Metro West CD has had strong support from the region’s banking community and good success with area foundations, though the latter is a very small pool of opportunity. Individual donations have also increased over the last year in part due to the investment of the CITC grant program in helping us build up our infrastructure for fundraising. Collectively, we believe we have the relationships and capacity to raise the funds necessary to implement our Community Investment Plan.

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

Metro West CD, founded in 1991 as Watertown Community Housing, has more than 20 years of experience in real estate development, program administration, and community advocacy. Some of our successes include:

- Preserved and updated 25 units of affordable housing by winning more than \$4 million in public and private funds for the renovation of St. Joseph Hall. Renovations, included new kitchens and bathrooms, new windows and other energy efficiency upgrades. The total project cost was \$5.4 million. This property had affordable housing restrictions that were set to expire, so Metro West CD’s acquisition prevented the displacement of 25 elderly households.
- Responding to 2,000 calls for assistance in 2013. Calls come from families on the cusp of homelessness to families seeking housing for elderly parents to landlords seeking to understand their legal obligations.

- Creating 18 permanently affordable rental units by acquiring and renovating 1060 Belmont Street using Low Income Housing Tax Credits and other state and private resources. This \$5.5 million project created homes for 18 low-income individuals and families.
- Winning a MAPC Sustainable Communities grant to work with three towns in the creation of Housing Production Plans (Belmont, Lexington and Watertown).

Metro West CD has supported the Commonwealth's Sustainable Development Principles since they were first adopted. Examples of our projects and programs:

- Focus on re-use of buildings and concentrating development near transit and other infrastructure: The 1060 Belmont Street renovation is located on an MBTA bus route and close to schools, shopping and the Waverly commuter rail stop with connections to employment hubs in Waltham and Cambridge.
- Promote equity by increasing the opportunities for low and moderate income individuals to move into a community. The St. Joseph Hall renovation provided two new units for clients of the Department of Mental Health.
- Protect land and conserve resources by clustering development on sites and promote open space and passive recreation on-site. The proposed Harvard project will cluster 35 units in 3 acres of a 29 acre parcel.
- Prioritize regional planning and coordination of efforts and resources. Metro West CD has been part of the Housing Production Plans in Belmont, Lexington, Watertown, Boxborough and is currently facilitating the Fernald Working Group, a coalition of Waltham based community groups leading a community-based planning process for the re-use of the Fernald Center.

### **Section III: Updated Board of Directors List**

#### **Metro West Collaborative Development, Inc. -Board Members & Affiliations - 2014**

**Robert Flack (President)**  
Senior Vice President of Development, Twining Properties. Bob oversees the operations of two luxury rental towers. He has over 30 years of experience in residential development and construction management. Bob is a Watertown resident.

**Mike Sherman (Treasurer & Vice President)**  
Senior Consultant - Creative Computing, Inc. Formerly spent 20 years in public housing administration in Brookline and Chelsea. Mike is a Watertown resident.

**Kalyani Devajyoti (Clerk)**  
Kalyani is a retired member of the Boston Scientific Human Resources Department. She is a resident of a Metro West CD developed property and is a native of Guyana.

**Helen Bakeman**  
Helen Bakeman is a retired consultant who worked in the areas of affordable housing policy and international development. She lives in Belmont and is a member of the Belmont Housing Trust.

**Anahit Tokatlyan**  
Anahit is the Program Assistant for Asset Development of the Midas Collaborative, a group that helps low income families build assets. She is active in several Watertown Armenian civic groups.

**Alisa Gardner-Todreas**  
Alisa is an affordable housing development consultant. She is a Belmont resident and has served on the Belmont Housing Trust for nearly 10 years.

**Tascha Moore**  
Tascha grew up in Watertown and is a resident of a Metro West CD developed property. She is employed at Commprint in Waltham.

**Paul Moreton**  
Paul is a residential realtor based in Belmont. He is a Watertown resident and is active in several Watertown organizations including the World of Watertown.

**Pat Kennedy**  
Pat is a retired school teacher and principle. She also served as a chaplain at Youville Hospital for many years. She is a resident of a Metro West CD developed property in Watertown.

**Evelyn Brito**  
Evelyn is the Front Desk and Resource Coordinator, Irish International Immigrant Center and is also a film maker, most recently serving as Artist in Residence, at the Dudley Street Neighborhood Initiative in Boston. Evelyn is a resident of a LexHAB developed property in Lexington.

**Suneeth John**  
Suneeth is a landscape architect who resides in Newton. Previously he lived in Watertown where he served as a Zoning Board of Appeals member for several years. He is a native of India.



Section IV: Gateway Municipality or Rural Set-Aside  
Not applicable.

Section V: Other Materials  
Materials Attached.