

**SOUTHWEST BOSTON COMMUNITY DEVELOPMENT CORPORATION
COMMUNITY INVESTMENT PROPOSAL UNDER COMMUNITY INVESTMENT
TAX CREDIT PROGRAM**

I Constituencies and Geographies.

Southwest Boston CDC serves the Hyde Park and Roslindale neighborhoods of Boston. This three-year Community Investment plan will focus primarily on Hyde Park, and in particular the portion of Hyde Park that lies within the Fairmount Corridor. The Fairmount Corridor has generally been defined as the one-half mile swath of land that lies on either side of the Fairmount (Commuter) Rail Line of the MBTA. This is the area where much of SWBCDC's work in the past five years has been focused, through SWBCDC's participation in the Fairmount Indigo Line CDC Collaborative, the Fairmount Transit Coalition and the Fairmount Greenway Task Force.. As will be discussed below, our current development pipeline and community planning opportunities and interest are centered on the Fairmount Corridor. There is not a hard boundary between Hyde Park and Mattapan; thus we envision doing work within a portion of the Fairmount Corridor in Mattapan, southwest of Mattapan Square.

A significant part of this plan will cover the entire Hyde Park neighborhood. Southwest Boston CDC's continuing and new work to strengthen coordination and collaboration among social and human services agencies, especially those serving low income and newcomer populations will cover all of Hyde Park. Our particular focus in this human service coordination work -- bringing social action into social work -- will seek to engage non-white and immigrant residents and small business owners across all of Hyde Park in shaping a community wide agenda for social and economic development services.

Through a collaboration with Jamaica Plain NDC to identify publicly owned, developable property in our two CDCs' service areas, we expect that we may undertake some joint ventures real estate developments in Roslindale. In any case the development site assessment exercise is likely to lead to discussion about how the two CDCs might collaborate or divide responsibilities in furthering comprehensive community development in Roslindale.

In many ways Hyde Park is Boston's AWOL neighborhood. Many Bostonians and Boston-based institutions have only the vaguest idea of where the neighborhood is, who lives there, what are its assets and challenges. It is generally not known that Hyde Park has

- the largest number of urban wilds (forested, public land) in Boston
- a very vibrant community of visual and performing artists
- a significant number of light industrial businesses and jobs near the convergence of commuter rail, long distance rail and freight lines
- the third lowest percentage of subsidized housing of all neighborhoods in Boston
- the fourth highest home foreclosure rate of Boston neighborhoods during the recent Great Recession

Particularly noteworthy is the fact that philanthropists, policy-makers and the average Bostonian are not aware that non-whites comprised 73 percent of population of Hyde Park according to the

2010 Census and that households headed by recent immigrants comprised over 20 percent of the population, a very dramatic increase in both measures since 2000.

So, one would wonder why discussions of Boston's minority neighborhoods generally lead with "In Roxbury, Dorchester and Mattapan..." and Hyde Park is not mentioned. Is it ignorance of the facts? indifference? a "(ladies' and) gentlemen's agreement" to be silent? Or might it be related to the surprising fact that the median household income in Hyde Park is higher than the median household income of the City of Boston, and well above the incomes in Roxbury, Dorchester and Mattapan. Does this mean that Hyde Park is, or could be a "high opportunity" neighborhood?

Perhaps at some point Hyde Park could be a "high opportunity neighborhood" but it is not there yet. And notwithstanding the curious median income data it is clear that there are many very low income families including a large number of recent immigrants in Hyde Park, especially in section bordering on Mattapan and Roslindale whose housing, health, employment and youth development needs are not served adequately. This was a key finding of a community needs assessment commissioned by SWBCDC, funded by the US Dept of Health and Human Services and conducted by UMass Boston in 2009. While the numbers of foreign-born residents, and lower income non-whites have grown since 2009, the services have not increased. A central element of SWBCDC's CIP is to clarify and strengthen the CDC's role as an advocate, broker and provider of services in Hyde Park.

Frankly SWBCDC does not know exactly why Hyde Park is such a fuzzy patch on people's mental maps of Boston neighborhoods. Nor do we know how to explain some of the demographic anomalies that have shown up in the Census. However developing a deep understanding of racial, economic and cultural characteristics of the diverse groups living in Hyde Park and the dynamics of the sub-areas in Boston's fourth geographically largest neighborhood will be a fundamental, first-order CIP implementation activity. As our Plan will be driven by community organizing and civic engagement, we cannot find the right organizing and engagement strategies without having a deeper understanding of the rapidly changing characteristics and dynamics of the many different communities that comprise Hyde Park. .

II Community Involvement

While there was not a community process around the development of this CIP per sé, there has been significant community stakeholder involvement in the distinct activities, programs and initiatives that SWBCDC will undertake under the CIP

Pipeline:

Residences at Fairmount Station (aka Nott Street Housing) Community Outreach consultant Jeff Stone interviewed some 45 neighborhood residents, business owners, civic association leaders, staff of local elected officials over a nine month period between February and October 2013 for feedback on revamped Logan Square housing proposal. There were numerous comments from stakeholders incorporated into the plan. From the one-on-one interviews SWBCDC formed Friends of Nott Street (FONS) a group of some twenty residents and business owners committed to building support for the project. Members of FONS played a

central role in turning out project supporters for a lively Article 80 public meeting in early January 2014. SWBCDC expects that FONS will stay together to help move the project through the approval process, and that some of the members may join a revamped Real Estate Development committee, and some may participate in SWBCDC's strategic transition committees dealing with future real estate development projects and housing services that SWBCDC may decide to deliver.. and the range of collaborations that will be necessary and desirable around these activities.

Community Planning:

In October 2012, SWBCDC's part-time consultant community organizer, working with organizers from SWBCDC Fairmount CDC Collaborative partners mobilized neighborhood residents to attend the first community charette for the entire Fairmount Corridor Planning Process, held at the Kroc Center in Dorchester, practically at the other end of the Fairmount Corridor. SWBCDC brought some ten neighborhood residents to the day-long charette, which helped set the overall goals and priorities for the Fairmount Corridor Planning Process. A major focus of SWBCDC's CIP is the Fairmount Corridor as it runs through a part of Mattapan and Hyde Park.

In February 2013 the BRA Fairmount Indigo Planning Process Corridor Advisory Group meeting was held for the first time in Hyde Park. SWBCDC contacted members, friends and interested citizens to attend the meeting and push for the establishment of a new station area planning group at either Fairmount Station or Reedville. The Hyde Park representatives on the CAG (including SWBCDC's Board member, Marcia Thornhill) had been pressing this for the previous two months. While the BRA did not accede to the wishes of the large group of Hyde Park residents mobilized by the CDC, the plan to establish a Fairmount station WAG, with or without BRA support is a major element of SWBCDC's CIP..

Development Maintenance and Preservation of Community Natural Areas:

SWBCDC's major non-real estate program is the Hyde Park Green Team which employs up to 20 youth each summer (and a smaller number in the Fall) to maintain and restore the Hyde Park's forested urban wilds areas owned by the Boston Parks Department. The annual work projects are developed jointly by the CDC and the Boston Parks and Recreation. Most of the young high-school age participants are paid through the Boston Youth Fund, which struggles each year to maintain legislative appropriation for the summer jobs. For the past two years SWBCDC has brought its young Green Team participants into a coalition of neighborhood and youth organizations -- the Boston Youth Coalition -- that have organized and lobbied the legislature for sustained funding for summer jobs.

All of the youth employed in the Green Team have typically been Hyde Park residents, in part because they are given bicycles and are expected to bike from home to the Hyde Park outdoor work sites to SWBCDC's offices. An element of the learning component of the Green Team program is educating the youth about their own neighborhood, which by the participants own reports gives them a connection with the neighborhood that they frequently did not have before joining the GT. In the Fall of 2013 we gathered the previous summer's participants to have a session about SWBCDC's housing proposal, and to hopefully engage them in the advocacy for the project. The expectation of staff were low about how this session would go -- how many

would show up on a Saturday morning, would they understand what housing development was about? Staff were astounded that almost half of the previous summer's crew came to the meeting and engaged SWBCDC staff in quite intensive questioning about the project (to the extent that we considered hiring them to play devil's advocate in our rehearsals for public presentation.) The experience has prompted staff and Board members to consider how the CDC could through Green Team and other programs engage youth in community action and civic leadership... and it will be a central part of the discussion that will take place in 2014 about the future shape of the Green Team.

Finally, Green Team members have actively promoted the GT Program and have produced ojn their own media about the program. In the summer 2013 program member Ephraim Forester age 16) developed a PowerPoint about the Green Team. The same year, GT crew leader filmed a video on the Green Team, which was subsequently edited and added to by UMass Boston; it was posted on YouTube in December 2013.

Social and Human Services

Since 2006 SWBCDC has coordinated Hyde Park Community Resources (HPCR) , a gathering of social service and civic organizations in Hyde Park (with some Roslindale and Mattapan participants that serve Hyde Park residents.) Following the completion of the UMass Community Needs assessments. HPCR could best be described as a "forum." It has undertaken several initiatives such as the publication of a directory of social services n Hyde Park and a services fair. However, HPCR over recent years has become much more of an information sharing discussion, evolving into a meeting filled with announcements. In July 2013 SWBCDC's Board decided after reviewing conclusions of an organizational assessment conducted by TDC consultants that it was necessary to focus its coordination and collaboration efforts on organizations that work primarily with Hyde Park's low income and newcomer populations, in part as a means of empowering as well as serving that population. Hyde Park Action was formed from a subset of the agencies that have participated in HPCR. HPA, which is still establishing an "organizational identity" will work more as a coalition than a forum. . It will focus on outcomes and results, and its M.O. has been dubbed as "bringing social action into social work."

III. Goals (of the CIP)

1. Maintain, sustain and grow the only community development organization that has served the neighborhoods of the southwestern section of the City of Boston over the last decade
2. Devise and create, refine and implement *a new business model that enables SWBCDC to be an active real estate developer in a variety of partnership and collaboration structures* by virtue of (i) SWBCDC's role in shaping a consensus vision of development in Hyde Park and (ii) the social and political capital it will amass through focused community organizing, civic engagement and leadership development.

3. Build a community and economic development agenda for Hyde Park around the community's unique environmental and open space resources
4. Advocate for planning processes, development and land use policies public and community services, infrastructure investment that will help *this unique majority minority neighborhood with an above-average median income* become and remain a "high-opportunity" community and be recognized as such.

IV. Projects and Activities

A Planning and development work: Focus along the Fairmount corridor Many of these activities will be undertaken in conjunction with SWBCDC's Fairmount Transit Coalition or Fairmount Greenway Task Force work. or with a backdrop of the BRA's Fairmount Indigo Planning Process.

Projects/activities

1. Residences at Fairmount Station: Complete design and financing of first affordable family rental housing to be developed in HP in over 20 years. (2014-16)
2. Logan Square Planning Process (through Mayor appointed Working Area Group to BRA Fairmount Planning Process, or independently initiated by SWBCDC and coalition of HP stakeholders)) focus on new development along Fairmount line one either side of SWBCDC's new housing, Lewis Chemical redevelopment and revitalization of Fairmount Ave commercial strip. (2015)
3. Taming the West Wild: Major refurbishment through Hyde Park Green Team of Urban Wild at West Street, between Pierce St. and Neponset River., possibly exploring forest agriculture (orchard) This urban wild is about a third of a mile from SWBCDC's proposed Residences at Fairmount station, and would become an important outdoor recreational area in a re-developed Fairmount Station area. (2014 – 16)
4. Doyle Playground -- SWBCDC's Fairmount Greenway local project, carried out by Hyde Park Green Team This is a Mass. DCR-owned parcel, unlike the other Greenway priority parcels (in other neighborhoods) which are generally owned by the City of Boston (2014 – 16)
5. Implement Hyde Park component of MBTA local business partnership. Working with Hyde Park Main Streets develop programs that will bind local businesses and the MBTA together in a collaboration to build ridership and build customer bases. This is an activity being funded under a federal grant to the MBTA and the Fairmount Indigo Line CDC collaborative (2014 – 2015)
6. Readville station area plan: including advocacy on Fairmount fares and service levels, planning for job growth compatible with residential qualities of neighborhood. 2015 – 16)
7. Publicly owned (esp. DND) disposition parcels: lead the planning for comprehensive disposition plan: middle income housing sites affordable/mixed income housing, mixed use sites; open space as new Fairmount Greenway priority parcels 2014 – 16)

8. New housing, commercial or mixed use projects: Identify opportunities and solicit credible, capable and financially strong partner or co-developer. (ongoing, throughout)
 9. Organize, support (spin off?) a Hyde Park Fairmount transit advocacy committee to continue work of building ridership, developing campaign for fare reduction at Readville station, increased service (headways, week-end), possibly evolving into a Hyde Park Transportation Coalition.
- A. Community services: Primary Focus for next three years: all of Hyde Park, potentially drawing in parts of southwest Mattapan south of Mattapan Square and portion of Roslindale adjoining Hyde Park, Mattapan and Jamaica Plain
- Activities:
1. Refocus Hyde Park Community Resources forum into Hyde Park Action Coalition: “bringing social action to social work”
 - Assess changes and development since 2009 federally funded community needs assessment
 - Convene Hyde Park, Roslindale, Mattapan agencies focusing on low-income and new comer populations to prioritize new approaches to employment, health, family, youth services in Hyde Park
 2. SWBCDC identify specific housing services it can provide or facilitate through or independent of Hyde Park Action.
 3. Small business technical assistance
 - In partnership with HP Main Streets and/or Hyde Park Board of Trade assess need and appetite among Clearly and Logan Square businesses for small business t.a.... and if indicated develop a collaboration with Community Business Network or other small business t.a. provider.

Strategic Transition Plan During the first six to eight months of the plan period SWBCDC will conduct a strategic transition planning process, which will frame the above activities in two lenses: (i) how the activities will contribute to the financial sustainability of the organization and reduce the financial hair-pin turns in the road that the CDC has traveled in the last few years and (ii) how the CDC can fully engage Hyde Park’s low income, non white (including middle income) and recent immigrant population in being central to the planning and implementation of the CIP and the activities’ to be undertaken. The strategic transition planning process will be carried out through three working groups: (1) community planning and development; (2) services and social action and (3) re-inventing the Green Team. Staff or consultants will facilitate the working groups, which will be comprised of Board members and other stakeholders who have an interest or something to contribute to the deliberations of the working group. A third to a half of the time of the working groups will be meeting with experts on different models for the work. So, for instance the Services and Social Action Working Group may learn about LISC’s Resilient Communities, Chelsea Connects, and the former Healthy Boston Program.

V. Evaluation and Measurement

Tools

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Data:

In both developing our work plans and strategies and in measuring progress we expect to make very extensive use of Census tools such as the American FactFinder/American Community Survey. Planned for early 2014 is a project to drill down into Census data to understand individual and household income interplay across different racial and cultural groups in Hyde Park. We will consult with sociologists and/or demographer to construct appropriate strategies for outreach and organizing based on how this data is interpreted [Example: is median income of minority households in Hyde Park relatively high because (1) there are many households with two working parents, at least one of whom has multiple jobs, (2) there are many household with older but still working parents and a working adult child unable to find affordable housing on her own or (3) there are many very low income immigrant households that the Census is unable to capture, excluding very poor people from the databases.]. The data, with the advice of sociologist will help us create several theories of change, possibly a logic model for community change, civic engagement,

Other data that we will use for community analysis as well as outreach are registered voter lists, voter registration rates, Boston resident listing. We will become familiar with the Boston Area Mapping Initiative to see if it can be a useful community analysis tool that might be in a success measurement toolkit.

We are also seeking resources to commission the design of a Fairmount Corridor geo-coding tool so that we can enter an address of a client, member, property on the market, foreclosed property and determine whether it is in a primary, secondary or other area of the Fairmount Corridor

Media

While we do not necessarily see media as a reliable evaluation tool, it can play a critical role in addressing the issue raised in Section I of this Plan: the invisibility of Hyde Park. The media strategy that we would develop under this plan is not primarily a strategy about SWBCDC, but rather about Hyde Park. It would need to be a strategy that is developed with others and would need to find the right balance between positive. “feel good” stories and hard truths. What we would want to measure, in concert with partners is the extent that good story-telling about needs and challenges in Hyde Park can be correlated with increased resources for the problem-solving institutions.

Evaluation Criteria and success indicators

<u>Evaluation Criteria</u>	<u>Indicator of Success</u>
Increase in minority and immigrant civic participation and leadership	<ul style="list-style-type: none">▪ Increased presence/attendance at major public meetings▪ Increased number in leadership positions (officers, committee chairs) of established civic organizations

	<ul style="list-style-type: none"> ▪ Comprise at least 30 percent of SWBCDC’s Strategic Transition process Working Group membership ▪ Significant participation in SWBCDC committees (existing and new) ▪ Increased voter registration and voter participation rates in minority precincts ▪ CITC investments specifically in connection with this activity
<u>Evaluation Criteria</u>	<u>Indicator of Success</u>
<p>Viabile models, operating agreements and partners identified to carry out real estate development or housing services programs</p>	<ul style="list-style-type: none"> ▪ Residences at Fairmount Station project has progressed toward full funding with current or new joint venture partner’s continued support ▪ At least one formal collaboration around housing services (such as foreclosure prevention; home-buyer training/counseling, home repair) has been implemented ▪ Financial arrangements around development or service partnerships are formally structured such that SWBCDC recovers all of its direct, indirect and overhead costs at a minimum ▪ CITC investments specifically in connection with this activity
<p>Fairmount Line improvements in Hyde Park are widely recognized as contributing to economic development of the neighborhood and the entire Fairmount Corridor</p>	<ul style="list-style-type: none"> ▪ Hyde Park Transportation Committee with broad community representation is established to take on continuing advocacy with MBTA on Fairmount line service ▪ Site of at least one commercial or mixed use development near Fairmount or Readville stations is chosen because of proximity to Fairmount line. ▪ Fare to at Fairmount Line Reedville station is lowered to same level as fares at all other stations. ; ▪ CITC investments specifically in connection with this activity
<p>Hyde Park Green Team work is regarded as multifaceted and synergistic with respect to environmental protection, youth developmental employment and training, community building and</p>	<ul style="list-style-type: none"> ▪ Broader and larger funding base for Green Team ▪ SWBCDC has established a network of former GT members and works to

community development	involve them in membership and leadership of SWBCDC and other HP organizations. <ul style="list-style-type: none"> ▪ CITC investments specifically in connection with this activity
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VI Collaborative Efforts

Southwest Boston CDC’s core work over the past five years, the work contemplated in this CIP plan and in fact SWBCDC’s very survival is totally immersed in collaboration.

The CDC’s single pipeline project – The Residences at Fairmount Station – is a joint venture with one of our CDC partners in the Fairmount Indigo Line CDC Collaborative. We are currently collaborating with Jamaica Plain NDC to undertake an inventory of City-of-Boston owned land and property in the neighborhoods that our two CDCs serve, to identify development opportunities, including joint venture opportunities.

A central goal and activity of this CIP is to develop a viable business model for Southwest Boston CDC to continue to have a role in real estate development in our target neighborhoods through a variety of partnerships and joint ventures, with a variety of partners... because we recognize that in the medium term Southwest Boston CDC does not have the financial capacity to be a sole developer.

SWBCDC will continue to be a central player in the Fairmount Corridor development and community organizing work. Much of our real estate development and community planning work will be pushed forward by The Enterprise Rose Architectural Fellow that the three CDCs in the Fairmount Collaborative will be sharing for the next three years. The Collaborative has successfully advocated for new development capital resources (e.g. the LISC TOD Loan Fund, which is rolling out as this application is being prepared) and will continue to be advocating for more targeted development capital as well as public funding policies that incentivize and favor the type of transit oriented development that SWBCDC and its CDC partners are undertaking.

Our plans for the Hyde Park Green Team entail both expanding a very effective collaborative relationship with the Boston Parks Department around cleaning up and preserving City forested land in Hyde Park, but also tying the Green Team work back into the Fairmount Greenway Task Force concept plan. We believe that SWBCDC’s approach to youth-implemented improvement to urban wilds can be introduced throughout the Fairmount Corridor as another strategy for the Fairmount Greenway Task Force (of which we are a member) can pursue.

While SWBCDC expects to initiate and lead advocacy for establishing a formal station area planning process at the Fairmount Station, we are certain that we can neither establish an “official” station area planning group through the BRA process or come up with a compelling and viable area plan without the active participation of individuals and groups that we have not had close collaborative relationships with before: the Hyde Park Main Streets, the Hyde Park Board of Trade, several major property owners in the area and several of the prominent civic

associations in Hyde Park. We recognize that a similar coalition will need to be constructed to undertake what could be even more complex and challenging planning around the Readville station in several years.

We have begun to lay the groundwork for a multi-faceted collaboration with Hyde Park Main Streets and have suggested roles that Main Streets could play (and be compensated for with a federal DOT grant to the MBTA and the Fairmount CDC Collaborative). Specifically there is a set of activities still being refined and clarified, around building stronger relationships between the MBTA and local businesses within the Fairmount Corridor. We will very shortly begin working with HP Main Streets on an effort to identify local businesses within the Logan and Cleary Square commercial district that could sell various Fairmount Line commuter rail passes, which cannot otherwise be obtained locally anywhere in Hyde Park.

One of the major inquiries that SWBCDC Board and staff will be pursuing as part of the strategic transition planning that will take place during the first half of 2014 will be the CDC's role in fortifying an existing or building a new coalition of Hyde Park service providers. SWBCDC has been the convener, facilitator and administrator of the Hyde Park Community Resources Forum for some seven years and in the summer of 2013 pulled together some of the HPCR groups that are clearly serving low income and/or newcomer populations in the neighborhood to form Hyde Park Action, which might be said to be trying to bring social action into social work” It is clear that if HPCR is to continue and/ or Hyde Park Action is to launch, it will only happen if there is a more formal agreement among SWBCDC and the human and social service providers on how these coalitions will be managed and resourced and how action and workplans will be developed. SWBCDC will also need to be considering how to shift some of its focus from coordination of the coalition(s) to being an active service provider around housing services, and possibly small business assistance and workforce development services.

VII Integration of activities/consistency with community strategy and vision

Our plan is crafted around a community and regional plan. A major part of SWBCDC's Plan is built around the larger Fairmount Corridor planning and development, -- the corridor-wide economic development strategy, transportation equity that will maximize access to opportunities within and beyond Hyde Park and open space strategies. This CIP seeks to implement the vision underlying the Boston Redevelopment Authority's Fairmount Indigo Planning Process by building on what is unique and distinct about each of the Fairmount station areas within Hyde Park within the context of a corridor-wide economic development strategy.

The three “legs” of our CIP stool – community planning/real estate development, coordinated social and human services and youth employment in the environment are integrated in several interesting ways.

- Much of our contemplated planning and development work will be focused around the nodes of the Fairmount line, We are envisioning the programming of the Hyde

Park Green Team to be shifting to the Fairmount Corridor, with our Green Team young workers engaged in conservation, development, trail making of sites within the Fairmount corridor, in proximity to the targeted development nodes and tied into the Fairmount Greenway Task Force.

- The early meetings of the Hyde Park Action Coalition, the newer social services coalition, have surfaced both youth services and employment services as priority needs identified by service providers. The Green Team addresses both of these needs to some extent; the development of a comprehensive social action in social work agenda is likely to influence the “re-invention of the Green team, and an assessment of whether SWBCDC should and can expand the scope of summer and school term youth jobs beyond outdoor, environmental consecration work
- The enhanced community organizing component of the Green Team’s work – more active engagement of our young participants in recruiting residents from the immediate surroundings of urban wilds restoration projects to become Friends of the Urban Wilds groups -- will pilot a planned shift to incorporate community organizing more systematically into development project selection and priorities.

It can be said that the seat on top of the three legs is a reinvigorated community organizing and civic engagement strategy that will be focusing in particular on the newer (mostly non-white, and largely immigrant) residents of Hyde Park who have had limited access to community building and community development and have found the existing civic and political infrastructure to be insular and uninviting.

XIII Financing Plan

SWBCDC’s CIP presented here is a three year plan. We estimate that the total plan cost – salaries and fringe of employees, consultants, interns and in-kind and overhead and administration will be roughly \$1.6 million

CITC investors

SWBCDC has not scored pledges of investment in its CIP yet. With the departure of the former Executive Director in July 2013 and the Interim Executive Director starting during October 2013 and with a major real estate development entering the permitting and community review processes during the Fall of 2013, there was simply no time to meet with potential donor-investors and explain the program and the CDC’s plan.

We are confident that we can raise the \$100,000 needed to fully utilize the \$50,000 tax credit for which we are applying. Our donor category projections are as follows:

Local banks and bank foundations:	\$7,500
Other corporate contributions	\$7,500
SWBCDC Board members	\$3,000
Hyde Park, Roslindale residents	\$3,000
Friends of SWBCDC	\$2,000

Developers interested in Logan Square o Readville locations	\$15,000	
Harold Brown/Hamilton Realty Foundation	\$5,000	
New foundation grants	\$15,000	
Clients of socially conscious Financial advisors	\$3,000	
United Way of Mass. Bay CITC Donor “brokering”	<u>\$39,000</u>	\$100,000

Developer Fees and Overhead

SWBCDC does not expect to receive any development fees or overhead during the next three years, as it is doubtful that the Residences at Fairmount Station will not go into construction before the end of 2016. SWBCDC Executive director has proposed to LISC a new financing product: a loan or recoverable grant that would cover a portion of the overhead line that SWBCDC would be entitled to draw at construction closing, with advances tied to specific milestones in project design and financing. It is possible that the new LISC TOD Fund might be used in this way, which would potentially provide SWBCDC with approximately \$125,000 (on the \$9.5 M project) over the next three years

Fairmount Collaborative Funding

SWBCDC has received about 30 percent of FICC funding historically. FICC has been raising about \$600,000 a year in recent years. Allowing for a fifteen percent decline in FIC funding levels, over a three-year period that would generate approximately \$460,000 for SWBCDC

Foundation and Corporate grants

SWBCDC Board and Executive Director have recognized a need to seriously ramp up SWBCDC’s own fund-raising activity. The CDC has been too reliant on Fairmount Collaborative and City of Boston Green Team Support. SWBCDC will be engaging in early 2014 a fundraising strategy consultant and a grant-writer to develop a comprehensive fundraising plan and generate grant proposals. It is our expectation that we will be able to renew about \$30,000 a year of existing grants and raise \$75,000 in 2014, \$100,000 in 2015 and \$200,000 in 2016, for a total of \$465,000 over the three year period

In-kind services

SWBCDC currently has two reliable sources of “free” interns: MSW graduate students placed at SWBCDC under the supervision of our Associate Director who is qualified to supervise the MSW practicums by virtue of holding an MSW degree from Boston University and an Enterprise Foundation Rose Architectural Fellow that the Fairmount Collaborative CDCs will share cover the next three years. . Over three years the value of these interns and Fellows is expected to be about \$80,000

Fees for housing services provision

We estimate that for housing services that we will deliver directly and in partnership with other organizations we will earn about \$475,000 over the three year period.

RECAP

Plan cost (three years)	\$1,615,000
Sources:	
Developer Overhead loan	\$125,000
Fairmount Collaborative funding	460,000
Foundation and Corporate grants	465,000
In-kind, interns, Rose Fellow	80,000
Service contracts and fees	475,000
Individual CITC donors	<u>40,000</u>
 TOTAL	 \$1,645,000

IX History, Track Record, Sustainability

History

Southwest Boston CDC was founded in 2001 by a group of Hyde Park and Roslindale neighbors who were concerned about the rising costs of homeownership and rents. Between 2002 and 2007 SWBCDC was actively involved in campaigns to preserve section 8 expiring use housing in the CDC's service area. Weld Park Apartments and Florence Apartments were preserved as affordable housing with the help of SWBCDC's community organizers

At the urging of some local artists, in 2003 SWBCDC brought together a Coalition of Hyde Park artists, arts organizations and businesses which promoted Hyde Park arts and encouraged patronage of local businesses. Out of this effort came the annual Hyde Park Artscene outdoor art and music festival which ran every July until 2008, when the Menino Arts Center stepped in to represent the interests of Hyde Park artists.

In 2009 SWBCDC secured funding from the Dept of Health and Human Services to conduct a community needs assessment. The assessment was conducted by James Johnson and colleagues at UMass Boston. Two new initiatives were launched as a result of the needs assessment 02136, All things Hyde Park was spurred by business leaders' and residents' identified priority to revitalize the business district and promote Hyde Park as a great place to live. This neighborhood-wide committee including neighborhood associations, business leaders and elected officials planned and executed two sold out 'Taste of Hyde Park' trolley tours to

promote businesses around Hyde Park. Hyde Park Community Resources was established as a service providers' coalition to secure better services for low income and newcomer families. HPCR initially focused on improving accessibility to services for all Hyde Park residents. HPCR created Hyde Park's first service directory, sponsored two service information fairs (each attend by 200 residents and 25 agencies) and collaborated with the Boston Public Health Commission to convene community meetings on the health of Hyde Park. SWBCDC has been the fiscal sponsor for 02136, All Things Hyde Park and is the convener of HPCR.

Also in 2009 Mayor Thomas Menino worked with SWBCDC to establish a summer youth jobs program, initially focused on keeping the business district of Logan Square/Cleary Square clean, the program grew into the Hyde Park Green Team, which employs high school students to maintain and restore the urban wilds in Hyde Park owned by Boston Parks and Recreation.

Since 2004 SWBCDC has been a member of the Fairmount Indigo Line CDC Collaborative. Through FICC SWBCDC commissioned an urban designer to craft a conceptual vision for the development of Logan Square, organized to secure public investment in the addition of new stations on the Fairmount rail Line, organized to lower fares at the Logan Square (Fairmount Ave.) station on the line, participated in and shaped the BRA Fairmount Indigo Planning Process and identified priority parcels for open space development as part of the Fairmount Greenway.

SWBCDC is currently developing its first mixed income rental housing development, an important transit oriented development adjacent to Fairmount station. SWBCDC's previous housing development efforts were stymied by high development costs and objections to mixed use development that would provide needed affordable housing and revitalize a struggling business district.

Financing and funding track record

Although SWBCDC has not been able to complete a multifamily housing development (new construction or acquisitions to date) it has been able to secure pre-development funding for previous efforts, primarily from LISC and CEDAC, including loans for proposed Weld Apartments acquisition and Rowe Street Housing. Because these projects proved to be infeasible the loans, recoverable grants were forgiven by these pre-development lenders. Southwest Boston CDC, has secured financing for the Logan Square mixed use project, which has been transformed into the Residences at Fairmount Station, the active pipeline development. A loan from LISC for part of the Logan Square acquisition is amortizing on a monthly basis and SWBCDC has stayed current on payments. CEDAC loans for Logan Square and Residences at Fairmount Station are being guaranteed by SWBCDC's partner, Codman Square NDC.

A substantial part of SWBCDC's grant funding over the past seven to eight years has come through the Fairmount Indigo Line CDC Collaborative. FICC has been the conduit of multi-year funding from organizations such as the Boston Foundation, the Garfield Foundation, Miler Foundation, Citibank, TD Bank foundation as well as significant one-time grants from MAPC and the City of Boston, through HUD's Office of Sustainability. (Sustainable Communities grant and Community Challenge grant.) and a federal Dept of Transportation grant to the MBTA.

The Hyde Park Green Team has been generously supported by Boston Parks Dept, the Mayor's Discretionary Fund and the Boston Youth Fund, with additional funding provided by various banks including State Street Foundation and Blue Hills Bank and TD Bank Foundation.

The CIP financing plan projects a continued and intensified use of graduate interns and Fellows. Southwest Boston CDC has seasoned experience in using graduate social work students very effectively. Our Associate Director holds an MSW degree (from Boston University) and as such she is recognized as a credentialed supervisor of graduate social work students who are required to have practicum credits through placements in community-based organizations. Our MSW graduate students have played important roles in organizing annual Green Team start-up and in coordinating both Hyde Park Community Resources and the newly formed Hyde Park Action.

We have also been able to stretch funding for research projects by engaging professors at local universities as lead consultants who have in turn been able to use the consulting assignment as class projects to help accomplish some of the research goals and products. This was done with the Community Needs Assessment in 2009 conducted by UMass Professor James Johnson and on the Fairmount Collaborative Corridor retail opportunists, best practices and neighborhood business expansion study (2011) conducted by Tufts Professor Peg Barrigner.

Sustainability

SWBCDC's CIP is fully consistent with the Commonwealth's ten principles of Sustainability

Concentrate Development and Mix Uses: The focus of SWBCDC community planning and real estate development is along the Fairmount Corridor, in particular at the Fairmount Station. The single active pipeline project is probably the most transit oriented development currently in planning along the Fairmount Line. The station area plans that SWBCDC seeks to develop with the BRA, local residents and businesses and other Hyde Park institutions is focused on two transit nodes that offer tremendous opportunities for residential development and the revitalization and new development of commercial uses.

Advance equity: The residences at Fairmount Station will be the first affordable family housing developed in the Hyde Park neighborhood in over two decades, an area that has seen a rapid rise in low-income, minority and immigrant population in that period. A central goal of the plan is to engage lower income, minority and foreign-born residents (and their children) in planning, civic life and the development of equitable services in the neighborhood.

Make efficient decisions: While this is not directly applicable we are learning through the permitting process for Residences at Fairmount Station of ambiguous and inconsistent policies, practices and standards in use by the City of Boston that potentially hamper development and through Great Neighborhoods Initiative and the Mass Smart Growth Alliance we can identify such practices as requiring examination.

Protect Land and Ecosystems: This is the central mission of SWBCDC's Hyde Park Green team

Use Natural Resources Wisely: SWBCDC's Residences at Fairmount Station will be designed to LEED Silver Standards. One of the possible new housing services that SWBCDC expects to explore with partners is home repair and weatherization, following home energy audits.

Expand Housing Opportunities: *The Residences at Fairmount Station* scores well on every component of this standard: It is mixed income housing; it is immediately proximate to transit, which connects to several major job centers in Boston; it is within short walking distance of a YMCA, public library, numerous schools, houses of worship, super market, community center neighborhood retail; it provides twice the number of handicapped units than required by code and funder requirements

Provide Transportation choice: The central focus of SWBCDC's CIP is around realizing and capitalizing on the expanded transportation choice that the Fairmount rail line buildout has made possible... and completing the transit improvements that will change the character of this commuter rail line to an urban rapid transit line.

Increase Jobs and Business Opportunities: One of the primary goals of the Residences at Fairmount Station is to create more foot traffic and expand the customer base for existing and potentially new businesses in Logan Square. A priority area for Hyde Park Action is to provide employment opportunities, access to jobs and access to job training to

Promote Clean energy: A long-standing priority of the Fairmount CDC Collaborative as well as the Fairmount Transit Coalition has been to get the MBTA to introduce Diesel Modular Units as the principal rolling stock on the Fairmount line. This compact, energy conserving rail vehicle will not only cost less to operate but can potentially save the MBTA millions of dollars in construction cost by allowing the T to build significantly shorter stations

Plan Regionally: While the Fairmount rail line is entirely within the City of Boston, SWBCDC views its CIP and associated activities as part of a "regional" plan.