

## **COMMUNITY INVESTMENT PLAN**

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

WATCH serves the urban suburb of Waltham, a city of 63,300 people approximately 9 miles west of Boston. Waltham grew up during and after the Industrial Revolution of the late 1800s and early 1900s, when many factories established themselves along the Charles River. These companies built housing and recreational facilities for their workers near the work sites. Just like during that time, when immigrants came to Waltham for greater opportunity, Waltham remains a city of immigrants. Based on 2011 – 2015 Census data, 26% of residents are foreign born. 32% of families speak a language other than English at home.

Most of Waltham's current immigrant residents come here from Central America. There are also significant numbers of residents from Haiti, Uganda, India. In addition, the city retains working families of Italian, Irish, French Canadian and other descents who have lived in Waltham for generations, as well as newer residents, many of whom moved to the City for its (once) reasonable housing, as well as its mix of an urban, suburban and rural amenities.

Despite the high cost of housing, Waltham is home to a large very low-income population. WATCH's target community is this low-income population, which tends to live in the City's dense south side – often in the housing that was originally built for Industrial-era factory workers. The latest census data shows that nearly 34% of Waltham households earn less than 50,000 a year. And 14% – or over 3,300 households – earn less than \$20,000 a year. Many of WATCH's participants fall into this very poor sector of the community. The average income of individual tenants who visit WATCH's Housing Clinic (who tend to be their household's sole earner) is under \$20,000 a year.

Waltham has long been home to working families, yet it is surrounded by wealthier communities, leaving Waltham as the best option for jobs and housing for many families needing or wanting to remain in the immediate area. Waltham's six neighbors are Lincoln, Weston, Belmont, Lexington, Watertown and Newton. Waltham is often overlooked by funders who are unaware of its great need and great potential. Waltham functions as a Gateway City for immigrants from across the globe, yet does not quite meet the state qualifications for one. It is home to many wealthy families and corporations, yet thousands of families struggle to cover the costs of their most basic needs, working in very low wage jobs.

### ***Section 2: Involvement of community residents and stakeholders***

Input into the CIP happened in formal and informal ways throughout the organization. Our formal goal setting happens with our five-year strategic planning process. This is a year-long process which involves discussions with all our key constituencies in brainstorming and listening sessions as well as discussions at the Board of Directors and Advisory Board level. The full membership then meets at our annual meeting to look at all the ideas for growth and gives further input and ranking for these goals. The Board of Directors and Advisory Board then monitor the progress on these goals annually.

The CIP goals are taken directly from the five-year plan that was collaboratively developed in 2015 and covers the years 2015 – 2020. Over 150 WATCH members were directly involved in giving input into this five-year plan with six meetings of members prior to the Annual meeting and over 100 members giving input at two different Annual Meetings and ratifying the plan in April 2015.

The CIP will be implemented by WATCH staff and volunteers. The progress will be monitored at the meetings of our Board and Advisory Board and at the Annual Membership Meeting. Feedback will

also be given informally through our daily interaction with learners, clients, volunteers and supporters.

- *WATCH Grassroots Board*

WATCH decisions are made by our grassroots Board of Directors. The Board has 12 – 16 members, including representatives from our key program areas: Adult Education, Tenant Advocacy and Community Organizing. The other members have been involved in some aspect of the organization for at least a year and bring their experience to the decision making discussions. The Board meets at least ten times a year to make decisions on the goals and priorities of WATCH, as well as give input on strategies to support the work. WATCH's Board has given input on setting the goals for WATCH and the CIP and will be reviewing the progress on a monthly basis.

- *WATCH Members*

WATCH's Board is elected at the Annual meeting by dues paying members. Members are defined as those who donate to WATCH or take classes at WATCH and who agree with our values and mission. Approximately 90% of our dues paying members are Waltham residents. The remainder live in a neighboring community—such as Lincoln, Weston or Lexington—and see Waltham as their neighbor.

- *WATCH Advisory Board*

WATCH also has an Advisory Board of over 20 community members. These members are key stakeholders in the community, partners from the Business community, former WATCH Board presidents, and major donors. This group meets quarterly and gives input in an advisory capacity as to the direction of the organization and helps to ensure WATCH is doing work in a way that is accountable to the broader community.

- *Informal feedback and involvement*

Informally, there is continuous feedback to staff and the Board from our members, learners, and volunteers as to what the key needs are of the community and where there are opportunities for WATCH growing to meet those needs. That feedback also informs the current CIP goals.

WATCH encourages communication and input from all those involved and receive daily feedback and input from the many sectors we work with. WATCH has many people coming to our office each week: seven to nine Adult Education classes meet twice a week, which brings hundreds of students and dozens of volunteers; some of our tutor pairs meet at our office, as well as two to three English conversation groups; our Housing Clinic holds open walk-in hours twice a week bringing five to ten volunteer students and eight to ten households in need; and we have ten or more other interns and volunteers that come in weekly. With all of this activity in our 2,000 square foot office/classroom space, WATCH staff are very accessible to those who are in the office, to take suggestions on our work/approach, hear about new resources and opportunities, and to make connections between our programs. In this way, our work and progress on our goals receives continuous feedback and our goals and focus adjust in response to the community need and opportunities available, as shared with us by our clients, learners, and community partners.

We also receive informal feedback with our regular engagement with the local faith community. WATCH has several church partners who regularly support WATCH financially and provide a source of volunteers and engage in our community organizing campaigns. Through these partnerships, WATCH staff and Board members attend a service annually at each of these churches or places of worship to share information about our work. Through these interactions, we are able to get feedback on our work and goals and find out about new opportunities to expand our work.

WATCH Board members, members and volunteers will help implement this CIP. We rely on volunteers to run all our Adult Education programs and our tutoring program. Brandeis students and

teachers are involved in running our evening Housing Clinic. Low income tenants, organized as the Tenant Action Group, will be the driving force behind efforts to get funding for affordable housing development and they will draw on support from the broader membership and ally organizations. Clients and English learners will be key participants in the Civics Class and Job Training program and will give important feedback on the services and future direction of those programs.

### ***Section 3: Plan goals***

A. Continue providing our current community programs:

Adult ESL classes. Classes run by volunteers supported by a full time Adult Education Program manager. We currently have seven classes that meet twice a week in which learners pay a small fee each semester. In addition, we run two to three free English conversation groups each semester. Through classes and conversation groups, we will serve 110 English learners a year.

ESL free 1-on-1 tutoring program. WATCH currently has over 40 volunteers that meet weekly with an adult English learner. These pairs are supported by our Adult Education Program Manager. We will maintain this program and continue to match new tutors with learners to increase the tutor pairs to meet the community need.

GED/ Hi-SET prep course. WATCH has the only high school equivalency test preparation course offered in Waltham. We currently have 10 – 15 students enrolled and our goal is to continue to offer the class and to expand to a second class if there is community need to support it.

Free Walk-in Housing Clinic. WATCH partners with Brandeis University to offer free assistance for low income tenants. Assistance includes housing searches, filling out applications for housing or other assistance, applying for food stamps and fuel assistance, applying for affordable housing lotteries, understanding tenant rights in an eviction, identifying funds for rent and utility arrears, and referral for legal assistance. We will continue to serve approximately 250 households each year through the walk-in evening clinic

First Time Home Buyer Course. WATCH offers a four-evening course ten times a year that partners with local banks and other experts in providing information for first time home buyers. By taking the course, participants earn a certificate which can be used to qualify them for a 3% down home loan. We will continue to provide this program ten times a year, serving approximately 150 home buyers each year.

Home Weatherization Volunteer Days. WATCH holds about four events a year in which volunteers spend a day weatherizing a low income one to four family home in Waltham. Volunteers provide weather proofing on windows and doors, improve attic and basement insulation, and implement other low cost measures that reduce household bills and improve energy efficiency of the home. We will continue to provide at least four volunteer days per year, impacting 4 – 10 households with over 30 volunteers.

Tenant Action Group. Low income tenants who have come to our Housing Clinic meet monthly as a group to plan how to affect public policy in Waltham to increase the amount of safe and affordable housing in our community. Tenants are supported by a Community Organizer to identify ways to impact local decision making and to gain new leadership skills through public speaking, door to door canvassing, outreach at community events, and giving public testimony. We will continue meeting monthly with the over 150 families who have participated in the past three years, with the goal of 20 active tenants meeting per month.

B. New Initiatives: In addition to maintaining our current programs, we have identified community need and opportunity in five new initiatives.

1. Support implementation of the Rental Voucher program. Through a three-year organizing campaign, WATCH secured \$2.1 million to fund 50 local rental vouchers for three years. WATCH will be applying for the subcontract with the Waltham Housing Authority to be the agency to support the 50 households who receive the Waltham Rental Voucher. Our goal is to assist these households in finding a place to use their voucher in Waltham and providing ongoing, regular support for lease compliance and improving the household's financial situation. Our goal is that the 50 households are in a better place financially in three years and/or are able to secure housing without the use of the Waltham rental voucher.

This work will support the 50 households with training on topics such as family budgeting, tenant rights and responsibilities, credit counseling, and financial management. This will also benefit the broader low income community in Waltham as we will open up workshops on these topics to the public and clients that come to our Housing Clinic. In addition, if this program is successful, we could help more Waltham households in the future by getting more funding and expanding the program.

2. Housing Clinic Expansion. WATCH's goal in the next three years is to secure a part time or full time staff to manage the Housing Clinic and provide day time case management services. WATCH's free walk-in Housing Clinic is currently held two times a week and run by volunteer Brandeis University students managed by a Professor. This is not enough to meet the need of the low income rental community and currently staff are handling the overflow during the day. With the equivalent of only two and a half full time staff equivalents and five community programs, we need a dedicated staff person for this work.

Currently WATCH is the only agency located in the Southside of Waltham with free walk-in assistance focused on supporting low income renters. With rents rising, there is a growing need for additional supports for these households. With a dedicated staff person, WATCH will be able to provide more complete case management to our clients, identify additional community resources, fundraise for WATCH's tenant assistance fund, and network with other local agencies to coordinate services. This will result in a stronger safety net for low income tenants in Waltham with a goal of reducing evictions and resulting homelessness.

3. Organize for 30 more affordable housing units in Waltham. While WATCH's Board voted in 2010 to no longer develop affordable housing ourselves due to our small scale and the unfavorable political conditions, it is a core part of our mission to promote affordable housing in Waltham. There is currently a proposal by MetroWest Collaborative Development to rehab 30 units on the Southside and convert them to affordable units. This proposal is up for vote with Waltham's Community Preservation Committee (CPC). Our goal is to support passage of this proposal. If this proposal is not successful, WATCH's goal is to solicit other affordable housing developers to submit proposals to the CPC for funding.

4. Civics class and support citizenship goals of our English learners. Our English learners have identified the need of support with taking the citizenship test. WATCH's goal is to provide a class for those who are ready to take the citizenship test. We would also like to identify support for the fee required to take the test. Our goal is also to connect our learners with resources on immigration and citizenship issues so that they can clearly know their rights and explore any path to citizenship that might be open to them.

This will assist 10 – 20 Waltham residents in securing their citizenship over the next three years. It will also help another 50 – 100 residents get clarity on their status and rights and explore options for a

pathway to citizenship. Providing this service to the community will reduce the vulnerability of this population to deportation and scams and exploitation from those who take advantage of their situation.

5. Develop Partnerships to support job training and placement support for low wage workers. There is currently no formal source of job training or job referrals for low wage workers in Waltham. While there is a Chamber of Commerce for professionals, there is not a place for low wage workers to get professional support. Our goal is to partner with a regional job training and support agency and have that agency assist job seekers directly at our office twice a month. Our goal is for this partnership to include reaching out to local businesses to determine their employment needs and to identify training opportunities that would match these needs with local workers' interests.

WATCH also has a goal of advocating for bringing City funded Adult Education back to Waltham. Waltham had an Adult Education program many years teaching computer skills, ESL, beginning levels for hands-on skills such as carpentry, etc. WATCH's goal is that in three years, Waltham will reinstate some Adult Education programs that directly meet the needs of low income and immigrant members of our community. This will help these households have more career advancement opportunities and increase the family income.

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

Activities to be undertaken and their impact are specified below for each of the 5 goals of new initiatives.

##### 1. Support implementation of the Rental Voucher program

- *Partner with the Waltham Housing Authority*

WATCH has a good working relationship with the Housing Authority that has been strengthened by the joint proposal for the Waltham rental voucher. WATCH will apply for the agency RFP put forth by the Housing Authority so that we can partner to support the voucher holders. The Housing Authority has expressed interest in working with WATCH in this way and has identified ways in which we can support the program.

- *Assist Tenants in Finding Housing*

WATCH will assist in housing searches for households that need to locate housing to use the voucher. WATCH will identify houses that meet rent limits and satisfy household needs, assist with communication with potential landlords, and secure appropriate housing. WATCH has developed a relationship with the local landlord association and will continue to reach out to them to ensure acceptance of vouchers, where applicable, by their members. Having a proactive relationship with the landlords will help build confidence among local landlords and will result in placement of all the vouchers without significant delays. By assisting tenants finding housing, WATCH will support the overall success of the program, thus assisting 50 low income families with rent costs for three years.

- *Quarterly In-Person Meetings*

WATCH will meet with voucher recipients at least once a quarter to facilitate lease compliance and improved financial stability. WATCH will facilitate access to community resources, train households in financial management, and connect interested voucher recipients with career counseling. These steps are meant to ensure recipient is able to maintain a neutral or positive budget that will ensure no lapse in the family portion of rent due each month and support future housing independence. WATCH will check in with households in between in person quarterly meetings as needed to provide support and to follow up on any issues or goals identified in the in-person meetings or calls from landlords.

These contacts with the tenant will help ensure successful tenancy and give tools and resources to the tenant to increase financial independence.

- *Problem Solving with Landlords*

WATCH will check in with each landlord by phone once every six months to confirm that tenant is in compliance and there are no issues. In addition, WATCH will be available to address any issues that come up any time between landlords and tenants during the three years. WATCH will facilitate communication with landlord if needed, and work with tenant to assure compliance with the lease. Being hands on with the landlords will help keep positive relationships to ensure continued successful tenancies for the voucher holders.

- *Pursue funding for first month, last month rents and security deposits.*

WATCH initially asked in its CPC proposal for the rental voucher to include funding for first and last month rents and security deposits. The CPC was unconvinced that this would be needed and advised WATCH to come back six months after the rental voucher program was begun should tenants have a hard time placing a voucher due to the move-in funding required. WATCH will pursue this finding should it be identified as a barrier for the voucher holders. Funding could help tenants city-wide (not just voucher holders) with moving costs thus ensuring tenants are not stuck in unsuitable living conditions simply because they can't pay the \$3 – \$5,000 for first and last month rents and security deposits.

2. Housing Clinic Expansion. In order to create a staff position for the Housing Clinic, WATCH needs to raise at least \$30,000/ year in additional revenue for each of the next three years.

- *Pursue State Funding*

WATCH was approached by Senator Mike Barrett about our needs and encouraged WATCH to submit a proposal to fund staffing for the Housing Clinic in FY17. WATCH did submit a proposal for \$47,000 and the proposal was approved under the line-item funding for the state budget.

Unfortunately these items were vetoed by the Governor after passage by the State House and Senate. The future of these funds is uncertain. WATCH will continue to look for opportunities for state funding for the Housing Clinic Staff person, working with our State Senators and Representatives.

- *Generate funding through sale of real estate*

WATCH has a duplex rental property which it plans to sell in the next year. WATCH developed and maintained this property for 24 years as affordable housing. The affordable restriction on the property has expired and the City wishes for WATCH to sell the property and return a loan to the City associated with the duplex. WATCH's goal is to sell this property within the next six months. This will eliminate the debt associated with the property as well as some other smaller debts, and hopefully generate a small net surplus that can be used to fund a new position.

- *Pursue Grant Funding*

WATCH has a part time Development Director and a Development Intern. WATCH has been successful identifying foundations and securing grants for our Adult Education and Community Organizing work. Our goal is to perform extensive research on any grants that might be a fit for funding our Housing Clinic staff position. Identifying and developing a relationship with two to three foundations for this work would help ensure ongoing support for this position.

- *Pursue other sources of Funding*

WATCH runs the Housing Clinic in partnership with Professor Laura Goldin from Brandeis University. Ms. Goldin is actively pursuing funding within the University and from corporate supporters to fund this position. In addition, WATCH has been invited to partner with the Waltham

School District to support a major initiative to support at risk high school students. WATCH's role would be to support the at-risk students and their families with finding or securing affordable housing and facilitating access to other community resources. The District is currently applying for a large grant with the Barr Foundation for this project and will pursue other funding for it. If this project is successful, WATCH could receive some funding which could support this staff position.

Securing funding for a staff person for the Housing Clinic will result in improved outcomes for low income tenants seeking assistance because there will be stronger supervision of the evening clinic, consistent day time walk-in hours, more consistent follow through, and stronger cooperation between local agencies.

### 3. Organize for 30 more affordable housing units in Waltham

- *Support current MetroWest Collaborative Development (MWCD) proposal*

WATCH will meet with MWCD in the next two months to determine next steps in moving the proposal forward. WATCH, through engaging its Tenant Action Group and membership, will support the current proposal in front of Waltham's Community Preservation Committee (CPC) to develop 30 units of affordable housing. WATCH will provide testimonial support with 10 speakers at 2 - 3 public meetings and get 10 letters of support from ally organizations and churches. 100 WATCH members will write letters to their City Councilor to support this proposal at the Annual Meeting and other WATCH meetings and classes. WATCH will work with MWCD to analyze the CPC and City Council to identify allies, opponents and those who may be persuaded to support the proposal. If the proposal fails, we will ask MWCD to resubmit with the feedback given by decision makers.

- *Identify and support other agencies in proposing affordable housing development*

Should the MWCD proposal not be successful, and it is not feasible to resubmit, WATCH will pursue other agencies to develop affordable housing in Waltham. We will find an agency that has a similar approach as MWCD, and assist them in developing a strong proposal based on feedback from decision makers.

- *Open up other city sources of funding for affordable housing*

Waltham currently has a Housing Trust Fund. When multi-unit housing developers do not want to set aside 10% of their units for affordable housing, they put money in the Housing Trust Fund. The goal of the Fund is that the City will use the money to develop affordable housing with it. However there is a lack of information about the fund; no public official that WATCH has spoken to seems to know how much is in the Fund and what is being spent on. This lack of transparency is something WATCH wishes to address. We want to ensure that the funding is spent to expand the stock of affordable housing in Waltham. WATCH will ask an ally City Councilor to publicly request this information for the City Council. We will work with the City Council to set up mechanisms for spending the existing and future funds on affordable housing. We will engage 100 Tenant Action Group and other WATCH members in organizing for this public policy initiative.

Securing funding appropriated for affordable housing development will assist low income tenants have a safe, affordable place to live and will eliminate some of the overcrowded and unsafe living conditions in Waltham rental housing.

### 4. Civics class and support citizenship goals of our English learners.

- *Creating the Curriculum for the Civics Class*

WATCH will identify course texts find and create a curriculum that will prepare students for the citizenship test while also providing information from outside speakers on how to fully engage in the

democratic process as a citizen. WATCH will identify written resources and tools for the course. Course work will include information on community organizing and how citizens can effect public policy change. Those who have taken and passed the citizenship test will come to give tips to the students.

- *Recruit teachers and enroll students*

WATCH will recruit volunteer teachers for the class and any speakers for the workshops. WATCH will provide the necessary training for the teachers. WATCH will schedule the class based on availability of teachers and students. WATCH will determine student eligibility of those interested from our list of past and current ESL and GED students as well as advertising in the community. WATCH will enroll 15 students for this class which will be held once a week for 10 – 12 weeks and we will hold at least one course per year.

- *Immigration Education*

WATCH will identify local and regional resources to support immigrants who have questions about their status and path to citizenship. WATCH's goal is to set up an immigration clinic once a month to provide free one-on-one support on immigration issues. WATCH will also hold periodic workshops for immigrants as needed such as a "Know your rights" training. This training will cover what to do if you are approached by an immigration enforcement official or detained by the police or ICE.

By providing this resource to the community, we can assist more residents become legal citizens and contribute to the community in this way. It will also bring clarity for those immigrants searching for a way to become a legal citizen and reduce some of the fear in our community.

#### 5. Develop Partnerships to support job training and placement support for low wage workers.

- *Career Center*

WATCH has had an initial meeting with the Operations Manager of Massachusetts One – Stop Career Center in Framingham. The Manager expressed an interest in providing services in Waltham which is in their catchment area. WATCH will follow up to pursue designation as a satellite location for the Career Center. Securing a partnership with an established career center, which can provide services within Waltham will increase access for Waltham residents to top quality career training, guidance, and job connections.

- *Waltham School District*

WATCH will continue partnering with the Waltham School District on assisting at risk or homeless youth and will develop a relationship with the District. WATCH will survey 200 low income residents in Waltham to determine what kinds of Adult Education programs would be most useful for them. WATCH will then present this information to the Superintendent and gauge openness to restarting the Adult Education program in Waltham. If advocacy is needed to secure funding, WATCH will engage members in advocating for these funds. By restarting Waltham's Adult Education program, we will bring more options to low wage workers to improve their income and make career advancement.

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

WATCH will track progress toward the CIP goals and objectives at weekly staff meetings, monthly board meetings, quarterly Advisory Board Meetings and Annual Membership meetings. During these meetings, staff will share information and updates on specific components of the goals and activities as progress is being made or roadblocks encountered. During the Board and Advisory Board meetings, members will have an opportunity to give input and help brainstorm solutions to roadblocks.



Once a year, the Board will conduct a thorough review of each goal and objective and rate the goal as met, partially met, or not yet met. For those that aren't met, the Board will discuss whether a change in strategy or approach is needed. Staff will report on progress towards goals in monthly written Program Updates. Progress toward goals will be reported in our monthly e-news that goes to 1,000 members and is read by 300 members and in our biannual newsletter which is mailed to 400 members and contacts and distributed at community events. Members will get a progress update at the Annual Meeting in addition to a chance to take action to further one of the objectives.

WATCH staff collects data on member participation in all our programs. We track these objectives via our organizational cloud based database Salesforce, where we record attendance at WATCH meetings and events, participation as volunteers, Adult Education class participation, Housing Clinic intake data including demographic information and housing problems, participation as a volunteer with WATCH programs and attendance to other WATCH events.

Measurement of Success for each program goal

### 1. Support implementation of the Rental Voucher program

Success will be measured by whether or not we are awarded the subcontract to provide case management for the rental voucher lottery winners. If we are awarded the contract, we will develop metrics to determine the starting point for each tenant to create a snapshot of their family's financial status. This will include family income, having a checking and savings account, credit score, amount of money in savings, status with current creditors, current living situation, opportunities for career advancement in current job, as well as indicators of community integration such as having a drivers license and library card. We will track progress in all areas during our quarterly meetings with a checklist to document any changes in status in these areas. Each tenant will set their own financial, career, and housing goals and the staff will help the tenant in coming up with steps needed to achieve those goals. Tenants will evaluate progress toward their goals in the quarterly meetings with staff. WATCH will also document any roadblocks to tenancy as well as any attempts to resolve these and any communications with landlords. We will keep a chart that tabulates all data on roadblocks as well as all communication with landlords in addition to paper files for all clients.

### 2. Housing Clinic Expansion

Success in this goal will be clearly defined when funding is secured and a staff person hired for this position. From there, a job description will outline responsibilities in line with the activities to be taken and objectives for expanding support for low income tenants in Waltham. Monthly check-ins between the staff person and the Executive Director as well as monthly Board reports will document progress toward the objectives.

### 3. Organize for 30 more affordable housing units in Waltham

Progress toward this goal will be measured by any movement in votes in the CPC or City Council on affordable housing proposals. Each proposal must be passed by the CPC, City Council subcommittee, full City Council and signed by the Mayor. All conversations with decision makers will be documented to make note of changes needed in current or future proposals to make them more likely to be passed. WATCH will maintain a calendar of any progress on affordable housing proposals and will document conversations with other affordable housing agencies for the purpose of soliciting proposals for affordable housing development in Waltham. Success with the Housing Trust Fund will be shown by being able to access information about the Fund, the total amount of money currently in the Fund and how it has been spent recently. Success will also be shown if money is then released to support current affordable housing projects.

#### 4. Civics class and support citizenship goals of our English learners.

The class will be evaluated by learner testing at the beginning and end of the course as to their readiness for the citizenship test. Another measurement will be the number of students who take and successfully pass the citizenship test. We will also get input from the teachers and learners about how effective the curriculum was and ask the students for feedback on the teaching methods and topics. The number of people who attend informational seminars on immigrant issues will be another measurement of impact. Lastly, our ability to bring in a resource to WATCH's office on a regular basis for the topic of immigration would be another measurement of success.

Tenants will play a key role in the evaluation process. Once we develop a final strategy with tenants with regard to improving housing conditions and “unlocking” CPA funds, we will also develop a timeline. We will measure success in meeting milestones against that timeline. We will survey tenants half way through the first year to find out if they feel they have the ability to affect change through this kind of collective work. However because the process will be largely driven by the participants in the monthly Tenant Action Group meetings, there will a constant evaluation of the progress of the work by those most directly affected by the issue. Through their involvement in these meetings, tenants will be continually analyzing the progress to date and making strategic adjustments in order to continue moving closer to their goals for more decent and affordable housing.

#### 5. Develop Partnerships to support job training and placement support for low wage workers

One measure of success will be our ability to secure a partnership with a regional Career Center. If we are able to do that, we will measure our impact by documenting the number of people that receive career training and job placement assistance. WATCH will keep records of hourly wage before and after assistance is provided. We will also get feedback from the participants as to how helpful the assistance was and suggestions for other ways we can assist in job placement and advancement. We will also measure success by the number of clients we get placed in positions with new companies and our ability to assist the companies in meeting their workforce needs.

### ***Section 6: Collaborative efforts to support implementation***

#### 1. Support implementation of the Rental Voucher program

*Waltham Housing Authority (WHA).* WATCH chose WHA as a partner to implement the Waltham rental voucher which WATCH secured funding for. WATCH and WHA staff have met 6 times over the last 2 years to work out details of the rental voucher program. WHA brings the expertise to implement the voucher program and WATCH brings the connection to the low income and immigrant community as well as connections with other agencies that will make this program successful.

*Other Social Service Agencies that assist the working poor in Waltham:* Salvation Army, Jewish Family and Children's Services, Waltham Housing Division, REACH to end domestic violence. WATCH works regularly with these organizations to assist clients at the walk in Housing Clinic and other day time case management. WATCH will work with these agencies to provide all the assistance available to the voucher winners to ensure their housing and financial stability and progress.

*Waltham Landlords' Association.* WATCH staff met four times over the last two years and gave frequent updates to the leadership with the Landlords' Association. WATCH relied on the landlords to give practical input and suggestions for the rental voucher program. The leadership from the landlords' group also shared information about the voucher program with their members, inviting a speaker from the Housing Authority and WATCH to speak about the program. The Association will continue to be a key partner as we work to place the rental vouchers.

*Local banks.* WATCH currently partners with 6 – 8 local banks who sponsor and present at our First Time Home Buyer Course. WATCH will reach out to these banks to see if they can offer workshops and one-on-one support on budgeting, financial management and credit counseling to the voucher recipients.

*Business partners.* WATCH has strong connections with three corporate partners who donate \$5,000 a year and about 20 other businesses who donate smaller amounts regularly. WATCH also has connections in the business community through our membership in the local Chamber of Commerce. Through these relationships, we will seek out mentors for those voucher recipients who have career goals that are beyond their current skill set. We will look for mentors in their chosen field to meet with them 1 on 1 and help them set goals and set up opportunities to gain skills in their field.

## 2. Housing Clinic Expansion

*Brandeis University* - WATCH has a 10-year old active collaboration with Brandeis University to run our Housing Clinic. Brandeis students staff the clinic, under close training and supervision by a Brandeis environmental law and America studies professor, and by WATCH's Executive Director. An attorney from Boston College Legal Assistance Bureau also helps to train students. Each semester, students already experienced in staffing the clinic serve as supervisors of the other students and manage some of the programs administrative tasks.

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

*State Legislators* - WATCH has some limited contact with state legislators around constituent and local issues. Our State Senator and two state Representatives all are familiar with our work and supportive. They have each made referrals for clients to WATCH for services. All three were involved in getting funding for WATCH's Housing Clinic added to the state budget and their staff were in frequent communication as the budget was being voted on. WATCH will continue to maintain these relationships and to keep the legislators informed about our work.

*Local Businesses and Major Donors* - WATCH has obtained small amounts of funding - a few thousand dollars a year - for our local tenant assistance fund. This is money to help tenants who are in a crisis and are not eligible for other assistance. WATCH could reach out to these supporters with a fund drive to staff the housing clinic.

*Metropolitan Boston Housing Partnership (MBHP)* - WATCH has an excellent working relationship with MBHP. For the last two years, a MBHP Housing Specialist has spent two days a month at WATCH seeing clients facing eviction to do housing counseling. This assistance with serious cases also gives direct access to RAFT funding for those eligible. MBHP staff is also available to provide training on tenant's rights and other housing related issues for tenants and is a great resource.

*Waltham Public School Title 1 Officer* - The Title 1 Officer is responsible for supporting the homeless students and those living in overcrowded conditions. WATCH has recently been partnering with the Officer in supporting a few families. The School District would like to find ways to expand WATCH's capacity so we can assist more families at risk of homelessness with our case management services. WATCH would like to be able to screen and identify families with school age children before they are facing a housing crisis so that we can connect them with appropriate community resources.

### 3. Organize for 30 more affordable housing units in Waltham

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

*Waltham Community Preservation Committee (CPC)* - WATCH worked for two years with the CPC and especially the Chair and a working subcommittee of members. Together, the CPC and WATCH made modifications to the rental voucher proposal so that it would be successful and pass the CPC and City Council. WATCH will continue to maintain relationships with the CPC and to encourage them to pass more affordable housing proposals.

*Waltham City Council and Mayor* - WATCH has several allies on the City Council and a respectful relationship with several other Councilors and with the Mayor. Both the Mayor and City Council will be key in getting an affordable housing proposal funded and WATCH will continue to facilitate their involvement with these efforts.

*Ally organizations and churches* - 19 Local organizations signed a letter of support for our last campaign- the rental voucher proposal. WATCH will engage these partners and others in calling on the CPC and City Council to fund an affordable housing development proposal. WATCH will ask for letters of support for the existing proposal and notify these organizations when there are key votes.

### 4. Civics class and support citizenship goals of our English learners

*Project Citizenship* - WATCH has been in contact with Project Citizenship as a regional resource for curriculum development. Project Citizenship and WATCH both receive funding from the Foundation for MetroWest have met at Foundation events. Project Citizenship also hosts large volunteer days for assisting residents in filing citizenship paperwork. WATCH's Board has expressed interest in hosting an event like this in Waltham.

*Immigrant Support Organizations* - MIRA, St. Mary's Immigration Center in Waltham - WATCH currently refers residents with questions about immigration to St. Mary's Immigration Center. WATCH would like to explore a partnership with MIRA, St. Mary's or other immigrant support agencies to provide their services on-site at WATCH 1-2 times a month.

### 5. Develop Partnerships to support job training and placement support for low wage workers.

*Career Center* - WATCH has had conversations with the Operations Manager of Massachusetts One – Stop Career Center in Framingham and our goal is to partner with this agency to provide their job training and placement services on site at WATCH. If they are not a fit, we will pursue other possible career center partners.

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

WATCH's vision for Waltham is: a community in which every family has what it needs to be economically stable. We envision a community in which everyone can participate. We envision a community in which meeting the interests of the whole population is a core value in decision making. WATCH seeks to create a community in which residents of Waltham, including low- and moderate-

income families, immigrants and others who may be left out, have a voice and can influence the way our community grows and functions.

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

WATCH's goals also help meet the needs identified in the City's 5 year Consolidated Plan (2015-2020). According to the Consolidated Plan, 2,350 Waltham rental households are paying more than 50% of their income towards rent & utilities. An additional 805 Waltham rental households are paying more than 30% of their income towards rent & utilities. 320 households live in overcrowded or substandard rental units. 185 households lack complete plumbing or have substandard kitchen facilities and 135 eligible households are living in overcrowded conditions. WATCH's support of tenants in the rental voucher program and our goal to develop more affordable housing as well as expansion of our Housing Clinic will help improve housing conditions for those most in need.

There are not any other known active neighborhood or local planning being done in Waltham and the City of Waltham does not have a proactive planning process for our CIP plan to integrate with. This is one of the challenges with developing affordable housing in Waltham and one of the reasons WATCH's work is so important. WATCH is providing the vision and concrete plans for supporting low income households in Waltham that the City is not providing.

**Section 8: Financing strategy**

WATCH will finance implementation of our CIP through an aggressive fund raising strategy. Our fundraising methods include researching and submitting foundation grant proposals to private foundations and City of Waltham government, making presentations at local churches and soliciting their support, carrying out spring and fall fund drives, soliciting local businesses for sponsorship of events, procuring local banks as sponsors for our First Time Home Buyer courses, and organizing fundraising house parties in local communities. We also collect program fees for our ESOL courses and our First Time Home Buyer courses

WATCH’s projected income for Fiscal Year 2016 – 2017 is \$304,700.

<b>WATCH CDC Projected Income for FY 2016 - 2017</b>		
<b>Income</b>		
	<b>Churches</b>	15,000
	<b>Individual Donations</b>	95,000
	<b>Organizations &amp; Businesses</b>	40,000
	<b>Government Grants (CDBG)</b>	3,700
	<b>Foundations</b>	65,000
	<b>FTHB Course Sponsors</b>	24,000
	<b>FTHB Course Fees</b>	7,500
	<b>ESOL Program Fees</b>	8,000
	<b>United Way CITC Revenue</b>	46,500
<b>Projected Income</b>		<b>\$304,700</b>
<b>Projected Expenses</b>		<b>\$240,00</b>

In the spring of 2013 WATCH assumed new management. At the time WATCH was burdened with \$200,000 in debt. During the past four years, WATCH has carefully managed its finances and paid down debt. We anticipate that in the spring 2017 WATCH will sell a property, which will put us in a debt-free position moving forward.

By Fiscal Year 2020, with the help of Community Investment Tax Credits, WATCH aims to raise our operating income to \$318,500 through the following sources:

<b>WATCH CDC Projected Budget for FY 2019-2020</b>		
<b>Income</b>		
	<b>Churches</b>	18,000
	<b>Individual Donations</b>	105,000
	<b>Organizations &amp; Businesses</b>	50,000
	<b>Government Grants (CDBG)</b>	30,000
	<b>Foundations</b>	75,000
	<b>Bank Sponsorships FTHB</b>	24,000
	<b>FTHB Fees</b>	7,500
	<b>ESOL Program Fees</b>	9,000
<b>Projected Income</b>		<b>\$318,500</b>
<b>Projected Expenses</b>		<b>\$300,000</b>

We anticipate that WATCH can continue to increase the number of individual donors, and the size of their donations, by participation in the CITC Program. Now that the program is in its third year, more donors are hearing about the program—from us, from media, and from their friends, associates, and tax accountants. More importantly, participants have learned to trust the program.

We also expect to increase individual donations as a result of implementation of our CIP itself. Our work with immigrants in the areas of English skills, leadership skills, integration into the community, and resource assistance are appealing to residents of Waltham and the surrounding communities. Our work with the Tenant Action Group in the area of affordable housing has also attracted the attention and support of individuals and churches.

Support from organizations and businesses is strengthened by our institution of a WATCH Advisory Board, which includes business leaders in the local community. Members are supportive through their own financial contributions, and their connections with others in the business community. WATCH will continue to reach out to businesses as sponsors of our Annual Meeting. In 2018 WATCH will celebrate our 30<sup>th</sup> Anniversary Gala, which will be an opportunity to strengthen our corporate involvement in WATCH. WATCH is also exploring the possibility of becoming a member of United Way.

WATCH’s First Time Home Buyer (FTHB) Program is strong and popular as a sponsorship opportunity for local banks. We project holding ten courses per year. Bank sponsorships are \$3,000 per course.

Local churches are particularly involved in and supportive of WATCH’s mission and programs. A number of volunteer teachers in the ESOL program are church members. They encourage strong financial support from their congregations.

Private and government foundations are an important source of funding for WATCH’s work. We will continue to research foundations whose objectives are consistent with WATCH’s work. WATCH has

recently been recognized as a Community Building Development Organization by the City of Waltham. This designation may allow WATCH to receive more funding from the city for our ESOL classes and activities.

WATCH does not know the plans of the United Way in the future, in regard to allocations of tax credits. Consequently, we have omitted United Way CITC funding from our CIP funding projections.

The funding sources on which WATCH relies are the ones with whom we have built relationships over the years. We take donor stewardship seriously and our donors are loyal to us. WATCH has also worked hard to develop strong programs and relationships with the people who come to us for assistance. We have built trust among our supporters. Our work is highly valued among many in Waltham and the surrounding communities.

**Section 9: History, Track Record and Sustainable Development**

**A. History and Track Record of Financing**

WATCH has a 29-year history of community development and has relied on a multi-faceted funding strategy that incorporates funding from local government, individual donors, corporate sponsorship, churches, and program fees. All of these areas have dramatically strengthened in the last three years with new staff leadership and with the assistance of the Community Investment Tax Credit program.

Income sources in the last five fiscal years

	Individual Donations	Corporate Sponsors	Churches	Foundations	Program fees	United Way CITC
FY12	33,904	23,510	14,595	24,761	4,859	
FY13	40,077	46,075	13,499	30,425	10,755	
FY14	63,200	47,093	10,627	27,500	10,112	
FY15	86,851	47,263	17,323	39,000	9,320	16,401
FY16	98,769	53,968	13,339	68,966	14,445	16.320

Foundations that have funded our work in the last five years and the total amounts given include:

People's United Community Foundation	5,000
MASS Vote	6,000
LISC - Local Initiatives Support Corp	7,770
Jones Partnership Fund	8,500
Unitarian Universalist Association (HQ)	8,500
Alice Willard Dorr Foundation	10,000
Energy Federated Inc.	10,000
Rockland Trust	10,000
TD Banknorth	10,000
Vincullo Charitable Foundation	13,000
Clipper Ship Foundation	20,000
Episcopal City Mission	27,000
Foundation for MetroWest	35,000

Bank sponsors for our First Time Home Buyer course over the last five years include:

Brookline Bank	3,000
TD Banknorth	3,000
Citizens Bank	4,000
Fairway Independent Mortgage	6,000
Needham Bank	6,000
Belmont Savings Bank	9,500
Watertown Savings Bank	12,000
Boston Private Bank & Trust Co	12,500
Cambridge Savings Bank	12,500
East Cambridge Savings Bank	16,000

Church sponsors and donations over the last five years include:

Eliot Church of Newton	2,000
Weston United Methodist Church	2,000
Weston United Methodist Church	3,500
First Parish in Lexington UU	3,500
Weston United Methodist Church	6,500
Congregational Church of Weston	14,000
First Parish in Weston	16,500
St. Peter's Episcopal Church	23,500

## B. History and Track Record of Implementation

WATCH has a long history of successfully carrying out activities similar or identical to those proposed in this Community Investment Plan. At many key points in the last 29 years, WATCH has overcome steep political barriers to make significant and positive changes such as the creation of the Housing Department in Waltham City Hall, the passage of Inclusionary Zoning and the Community Preservation Act, and an agreement with a national real estate investment trust to cap rents for over 100 low-income elderly tenants.

WATCH follows a community-building model. No matter what the program, WATCH seeks to connect people to each other and to new ideas, to develop leaders, and bring neighbors together to work collectively on a common goal. The primary approaches in this plan include: relationship building, community organizing, leadership development, political advocacy and organizing, policy analysis and development of policy solutions. Secondary approaches – those related to WATCH's other programs that help bring more people into our organization, and so into the primary housing development work—are: adult education, volunteerism, and workforce training. From day one, WATCH has been a deeply welcoming organization that seeks to be effective, not just exist. Many people have come to WATCH over the years with a wide range of problems that we do not directly address, because we are known in the community as the place to go if you need help of any kind. We continue that culture today, enabling us to engage more and more people each year.



## C. Sustainable Development

In addition to possessing the historical experience to achieve our goals, the goals of WATCH's Community Investment Plan are well aligned with the Commonwealth's Sustainable Development Principles. Just as the Commonwealth promotes "sustainable development through integrated energy and environment, housing and economic development, transportation and other policies, programs, investments and regulations", WATCH's interconnected programs—energy efficiency, adult education, leadership development and affordable housing—work together to advance a subset of those goals. Specifically, WATCH's plan supports the Commonwealth's goals to:

### Concentrate Development and Mix Uses

WATCH focuses efforts on Waltham's dense south Side. This is the priority location for the development of more affordable housing for Waltham's thousands of low-income families. The Southside features a dense, walk-able commercial center, bus and commuter rail stations, City Hall, the public library and other features that support this goal of the Commonwealth. Adding housing to the Southside would support the local small independent businesses on Moody Street, and help to further mix residential uses with the other downtown Waltham amenities. Furthermore, locating housing in the Southside would enable infill development and/or the renovation of existing degraded structures, including many from the Industrial Revolution era.

### Advance Equity

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

### Use Natural Resources Wisely

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

### Expand Housing Opportunities

Our plan's primary focus will result in expanding housing opportunities for low-income families in Waltham and the surrounding area. Our primary goal is the development of multi-family apartments. Because we will focus on advancing housing developments in Waltham's South Side, the housing will be located near jobs, transportation, schools, and public amenities such as City Hall, the public library, and parks.

### Increase Job and Business Opportunities

WATCH may expand our limited job training work with immigrants who are now learning English to provide deeper job training, and to partner with local companies in order to provide job placement services. This program may build focus on the green economy, building on our existing energy efficiency work.