



COMMUNITY INVESTMENT PLAN 2019-2021

SECTION 1: COMMUNITY TO BE SERVED BY THE ORGANIZATION

Dudley Neighbors Inc.'s (DNI) service area is the Dudley neighborhood of Roxbury and North Dorchester in Boston, Massachusetts. This neighborhood spans approximately 1.3 square miles between Dudley Square, Grove Hall, and Upham's Corner and is home to approximately 8,400 households and 24,000 individuals as of the 2010 Census. Dudley residents are approximately 34% African-American, 29% Latino, 25% Cape Verdean, and 12% White. Approximately 23% of Dudley residents are foreign-born, with 41% speaking a language other than English at home. Dudley is a young neighborhood; over 38% of the population is 19 years and younger.

The area served by DNI is one of the poorest neighborhoods of Boston. Median household income in Dudley is below \$29,000, compared to \$50,000 for the city as a whole. 35% of Dudley families are at or below the federal poverty line, compared to 16% for the City of Boston. Less than half of all persons in Dudley have full-time employment and the unemployment rate is above 10%, with youth unemployment more than twice that. 35% of Dudley residents aged 25 and over lack a high school credential. Only 11% of residents have a bachelor's or higher degree.

The Dudley Triangle, 62 acres located in the heart of the larger DNI service area, has been the primary geographic focus of DNI over the past 25 years. This area shares the demographic characteristics of the larger DNI service area and was home to more than 800 blighted vacant lots that have now been turned into affordable housing, open space, community farms and gardens, and other projects, all of which sit on the DNI community land trust. DNI has nearly completed the buildout of the City-owned land in the Dudley Triangle and is now working on developing projects on City-owned land in the larger DNI service area.

Added to this Triangle is a new parcel of land in Uphams Corner. The Citizens Bank Building, acquired by DNI in April 2017, presents new planning and development opportunities in a wider catchment area; this new parcel also is the first privately-acquired commercial space we will develop as part of the Community Land Trust (CLT).

SECTION 2: INVOLVEMENT OF COMMUNITY RESIDENTS AND STAKEHOLDERS

DNI is expert in engaging local residents to work together to undertake community development programs, projects, and activities which develop and improve our

neighborhood in sustainable ways that create and expand economic opportunities for low and moderate income residents. Specifically, for the past 30 years, DNI has worked hand-in-hand with Dudley Street Neighborhood Initiative (DSNI) and other community partners to engage thousands of low- and moderate-income residents in deliberate community planning and development activities to ensure that residents are able to shape and benefit from development projects in their neighborhood.

The original planning process in the late 80's led to the creation of an Urban Village Plan that guides DNI's work to this day, with regular revisions. DNI works to support community leaders, merchants, and young people to participate on area planning and improvement committees. Most recently, more than 100 neighbors participated in planning meetings to decide the development priorities for the remaining City-owned land in the Dudley Triangle. Residents and merchants have also played leadership roles in the Fairmount Indigo Planning Initiative, an effort sponsored to create economic development plans for the nine-mile Fairmount Indigo commuter rail line which passes directly through the Dudley neighborhood.

From its inception, DNI and DSNI have undertaken needs assessments and outreach efforts to create housing and economic development initiatives that respond to the needs of the community. The original master plan was developed out of a lengthy neighborhood planning process that led to the creation of the Dudley Urban Village plan, which replaced the City of Boston's proposed master plan for the area. Later planning efforts included a detailed build out plan for the Dudley Triangle, which has guided DNI's efforts to acquire and develop blighted vacant land into permanently affordable housing and other uses that benefit the community. In 2017, DNI updated an extensive survey of residents of homes on DNI-owned land. This survey and follow-up meetings led directly to the establishment of initiatives to build assets and income of local residents and seek out new partnerships around local workforce development.

The 2018 DNI Annual Meeting was held on May 10th, with participation of more than 100 resident leaders and land trust residents, and provided an opportunity for residents to articulate their development and organizing priorities for the neighborhood. These priorities are reflected in the Community Investment Plan. DNI also organized three membership meetings in the past year, with participation of approximately 50 community land trust residents.

The nine member DNI Board of Directors meets quarterly to provide guidance and oversight over the activities described in this plan. The Board will be the main vehicle for ongoing implementation of the Plan. Importantly, DNI's oversight is continuously informed by a large group of stakeholders regularly engaged by DNI in partnership with DSNI. We predict the following over the course of the plan:

- **DSNI Board of Directors:** The DSNI Board of Directors consists of 35 elected members who are responsible for the governance of DSNI and monitoring overall development coming into the catchment area. Meetings are held monthly. DNI staff are present and receive feedback on the needs of the neighborhood

which intersect with the CIP.

- Sustainable Development Committee: A committee comprised of Board Members of DNI, Board Members of DSNI, the Director of DNI, and 15-20 neighborhood residents monitors proposed developments in the area.
- Resident Development: DNI, in partnership with DSNI, is expert in providing resident leadership development and empowerment activities that build resident capacity while linking to the goals of this plan. Between five and ten staff and resident-led trainings and workshops will prepare residents for their leadership roles at DNI, DSNI, in the catchment area, and in Boston yearly. Youth are included in this process.
- Provide support to the Working Advisory Group, made up of neighborhood leaders, artists, merchants, and other stakeholders, to review RFP proposals and lead the community process to identify development partners who will best carry out the vision of the Arts and Innovation District plan in Upham's Corner.
- Engage 500 residents in the development of the DNI-owned Citizens Bank Building.
- Engage 500 residents in the planning of the physical development of the DNI catchment area including both privately-held and City-owned parcels (including 200 vacant plots). Residents are organized to give feedback at critical times during the planning process.
- Engage 250 residents, merchants, and artists in the Upham's Corner implementation process.
- Hold one annual leaseholder meetings (60-90 attendees) and one workshop (15-20 attendees) for homeowners on the Community Land Trust (CLT) yearly. These meetings are both an important feedback look and offer a pipeline to leadership for residents.

In addition, we hold periodic neighborhood meetings and engage 1-1 with residents on public development broadly defined to meet sustainable development principles. Meetings and conversations that are commonplace in our work include issues of energy and the environment (especially as it pertains to food justice), housing and economic development, transportation, public safety, the intersection of the arts (including the culinary arts) and the economy, and policy and equitable resource allocation from City and State resources to our catchment area.

These mechanisms ensure that the DNI constituency is actively involved in identifying priority issues and in the governance of the organization. The involvement of community residents and stakeholders is the foundation to our work and key to our long-held guiding value of *development without displacement*.

SECTION 3: PLAN GOALS

Goal 1: Lead the Upham's Corner Neighborhood Arts and Innovation District implementation effort, in partnership with the City of Boston and neighborhood partners

DNI, with DSNI, played leading roles in ensuring strong resident involvement in the City of Boston's Imagine Boston 2030 master planning effort. Hundreds of residents, merchants, and young people participated in community meetings and smaller workshops to express their priorities for development in Roxbury and North Dorchester, including the Upham's Corner neighborhood. As a result of this organizing process, the City decided to designate Upham's Corner as a pilot Neighborhood Arts and Innovation District and asked DSNI to co-lead a community process to develop Requests for Proposals (RFPs) for publicly-owned sites in the district. These sites include the Strand Theatre and the former Bank of America site, which will be the home of a new Boston Public Library. DNI was also able to acquire, with support from the City, the former Citizens Bank building across the street from the Strand. These properties, in addition to other properties owned by nonprofits, make up a unique opportunity to add hundreds of units of affordable housing, commercial and artistic spaces, a revitalized Strand Theater that serves the community, and a state of the art Upham's branch library.

This effort marks one of the first times the City and a community-based organization have partnered to co-sponsor a neighborhood planning process. DNI with DSNI has played a key role in conducting outreach to residents, artists, merchants, and youth, as well as creating interactive agendas for community meetings, educating residents about the development process, and holding the City accountable to produce RFP language that reflects the community's priorities including the implementation of strong workforce development standards (such as 51% local/51% POC/15% Women), community-driven benchmarks for affordable housing, fair wage requirements, and a list of desired and non-desireable businesses (non-desirable uses in the past included check-cashing businesses, liquor stores, etc.). We have, and will continue to do, the hard work of advocating at the City-level to replicate these types of processes making local regulatory and investment processes clear, predictable, coordinated, timely, and resident-centered.

DNI, with DSNI, is in an unprecedented position to apply what we have learned from out CLT to promote economic development (specifically small business development) without displacement. We are now regularly convening and meeting with partners to talk about affordable commercial space and the supports our local business needs (capital, technical assistance) to go to market through B2C, B2B (within the ecosystem of the neighborhood), and B2B (accessing larger markets) to create a healthier business climate in the catchment area.

Strategic public investment in the creation of affordable housing and affordable commercial space along the Fairmount Indigo corridor is intended to preempt gentrification typified by private speculation attracted by public investment in transportation. Over the next three years, DNI will continue to engage the neighborhood around development of the former Citizens Bank building and will also facilitate and monitor the larger community process around the City-owned parcels in the context of an Arts and Innovation District.

Benefits: Residents gain leadership skills during the planning process. Low- and

moderate- income residents benefit by being engaged in a community development process that prioritizes their need for affordable housing, resident-owned businesses that meet the community's needs, and (construction and construction-related) job creation during pre-construction and during construction.

Goal 2: Plan physical and economic development of the neighborhood

In addition to the major opportunity in Upham's Corner, there are a number of other development opportunities and planning efforts going on in the neighborhood that DNI will continue to play a major role in. This work benefits all residents of the Dudley neighborhood, particularly low-income residents, youth, merchants, and others who are not typically as engaged in neighborhood revitalization planning efforts. By providing tools and support to build resident capacity and leadership, DNI will ensure that neighborhood development projects will be shaped by local residents and will provide concrete improvements and benefits for the Dudley neighborhood.

Now that development of City-owned land in the Dudley Triangle is nearly complete, DNI will partner with the City of Boston Department of Neighborhood Development to engage the community around the approximately 200 City-owned vacant lots in the larger DNI service area. Many of these parcels will be developed into affordable to low- and moderate-income housing adding new families to the community land trust. Other parcels will be turned into playgrounds, community gardens, urban farms, and other projects to benefit the neighborhood.

Benefits: Residents gain leadership skills during the planning process. Low- and moderate- income residents benefit by being engaged in a community development process that prioritizes their need for affordable housing, resident-owned businesses that meet the community's needs, and (construction and construction-related) job creation during development. Everyone benefits from a stabilized neighborhood where development includes a neighborhood with a mixture of commercial, civic, cultural, educational, recreational, open spaces, and housing.

Goal 3: Sustain the operations and expand the scope of Dudley Neighbors, Inc. Community Land Trust to promote development without displacement and serve as a model for other communities

The Dudley neighborhood is highly vulnerable in terms of housing stability for its residents. The number and concentration of foreclosure petitions over a period of several years remains extraordinarily high compared to other parts of the City. This also suggests that the housing instability of children in the target area has increased, and is extensive. There has been a dramatic increase in rates of family homelessness in Massachusetts. Within Boston certain communities have a disproportionate number of homeless families, specifically Dorchester and Roxbury.

DNI's Community Land Trust is a proven example of a strategy to prevent both foreclosure and homelessness by insuring that housing is permanently affordable. DNI

provides leadership to the growing Greater Boston Community Land Trust Network to support emerging CLTs in Chinatown, Dorchester, Chelsea, and other communities. These efforts will result in policies and resources to prioritize disposition of public land to projects that maximize community control and create permanent affordable housing.

Benefits: Increasing protection of current housing stock affordability and advocating for new affordable housing in the neighborhood will benefit low and moderate-income families and help to stabilize the entire community. Supporting others in this model will expand housing opportunities while improving community processes beyond our catchment area and city-wide policies.

SECTION 4: ACTIVITIES TO BE UNDERTAKEN

For each goal, activities are summarized below. The expected impacts under each goal are detailed in Section 5.

Goal 1: Lead the Upham's Corner Neighborhood Arts and Innovation District implementation effort, in partnership with the City of Boston and neighborhood partners

Activities:

- Partner with City of Boston and other neighborhood groups to hold community planning workshops that will engage several hundred residents, merchants, young people, and artists to develop language for Requests for Proposals. (Note: planned to be completed by 2019)
- Provide support to the Working Advisory Group, made up of neighborhood leaders, artists, merchants, and other stakeholders, to review RFP proposals and lead community process to identify development partners who will best carry out the vision of the Arts and Innovation District plan.
- Lead efforts to ensure that potential developers in Upham's Corner are exceeding community standards for construction employment, affordable housing and commercial space, and other areas that benefit the neighborhood.
- Oversee the planning and developer selection process for the former Citizens Bank site, now owned by DNI, and ensure that the project reflects community priorities and DSNI development standards. DSNI and DNI will vote to approve the final developer.
- Organize community members to monitor the Upham's Corner implementation plan over the next several years to ensure that specific development projects remain aligned with the neighborhood plan.
- Work with community arts groups and artists to ensure that the Strand Theatre is transformed into a vibrant community asset that serves as an economic and cultural anchor for the neighborhood. This includes engaging an operating partner who is aligned with the vision of the neighborhood.

These activities will ensure that housing, commercial, and cultural space are developed in a deliberate, resident-driven process with the desired outcome being affordable spaces in the neighborhoods that can be occupied by existing neighborhood residents.

Goal 2: Plan physical and economic development of the neighborhood

- Finalize development of all remaining city-owned land in Dudley Triangle and undertake planning process to prioritize uses for the more than 200 parcels of vacant land in the larger Dudley neighborhood.
- Engage residents in development planning processes for DNI-sponsored projects at Dudley Miller Park (commercial), Magnolia Street (new affordable homeownership), and various community garden and farm sites around the neighborhood.
- Provide oversight and direction of private development in the Dudley neighborhood through the work of the Sustainable Development Committee, which reviews proposed projects and advocates for community benefits.
- Engage 500 residents, youth, merchants, artists and other stakeholders in the physical planning of the neighborhood.
- Expand partnerships with Tufts University Urban Environmental Policy department to build resident and staff planning capacity.

These activities will ensure that a mixture of commercial, civic, cultural, educational, recreational, open spaces, and housing are developed in a resident-driven process with the desired outcome being deliberate development that does not displace current residents.

Goal 3: Sustain the operations and expand the scope of Dudley Neighbors, Inc. Community Land Trust to promote development without displacement and serve as a model for other communities

- Complete the physical build-out of the Dudley Triangle with completion of new affordable housing and commercial projects, including Woodville Ave., and Dudley/Miller Park.
- Strengthen communications and management of the community land trust through quarterly DNI Board meetings, regular leaseholder meetings and resource fairs, and improved management systems.
- Provide post-purchase stewardship and foreclosure prevention services to land trust homeowners.
- Develop an organizational and business plan that ensures sustainability of DNI.
- Expand the successful Urban Farming Pilot Initiative to secure more vacant lots for commercial farming and increase access to locally-grown foods.
- Engage youth and residents to take leadership roles in *No Child Goes Homeless* initiative to ensure that school-age children in neighborhood have stable housing throughout their school experience.
- Provide technical assistance and support around the community land trust model and community control of development to other neighborhoods, strengthening the Greater Boston Community Land Trust Network.

- Host two community convenings with the Greater Boston Community Land Trust Network to engage residents and partner in learning more about the model and advocacy efforts they can join.

The impact of these activities will be to 1) continue to strengthen and show the efficacy of our CLT model; 2) use the CLT as a vehicle to reach residents; and 3) support others in this model to expand housing opportunities while improving community processes beyond our the DNI triangle and Uphams Corner.

SECTION 5: HOW WILL SUCCESS BE MEASURED/EVALUATED

For each goal in this CIP, we identify below our desired outcomes and impacts for 2019-2017. The tools and processes outlined after each set of outcomes will help us measure our progress with respect to those desired outcomes and impacts.

Goal 1 Outcomes/Impacts 2019-2021

- 250 residents, merchants, and artists participate actively in the Upham's Corner implementation process.
- Requests for Proposals are designed and approved with significant community input to ensure that they meet the priorities of neighborhood. That RFPs contain language that include pre-, during-, and post-outcomes.
- Significant community voice in selection of developers in Upham's.
- A new library, a revitalized Strand Theatre, new affordable housing, and commercial and cultural spaces combine to make Upham's Corner a model for promoting development without displacement.
- Negotiated agreements each year with developers to provide economically sustaining employment opportunities to 150 local residents, people of color, and women on local development projects. During this program period, jobs will be in the pre-construction, and construction phases.
- Small businesses in the area are thriving, with no vacant storefronts.

Evaluation: Resident engagement is tracked through sign-in sheets and leadership is tracked in terms of how many residents are taking roles in setting agendas and facilitating meetings. The development plans discussed above will be written documents that will outline priorities for each site. Tufts University UEP program is partnering with DSNI to document the Upham's Corner implementation process and measure how well community priorities are being met. In addition, the *Dudley Workforce Collaborative* evaluation system includes signed agreements with developers, weekly workforce meetings to track progress, and regular reporting requirements. Workforce development outcomes for adults and youth will be measured in conjunction with community partners.

Goal 2 Outcomes/Impacts 2019-2021

- Increased level of engagement and participation of neighborhood residents in neighborhood revitalization planning processes. 500 residents, youth, merchants, artists and other stakeholders participate each year.

- Regular meetings of Sustainable Development Committee to oversee disposition of city-owned land in Dudley Triangle.
- Series of well-attended community meetings in different parts of the neighborhood to develop Requests for Proposals for 200 city-owned parcels in the Dudley neighborhood. Disposition plan developed for all remaining parcels.
- Residents are successful in achieving concrete neighborhood improvements, including development of 80 units of affordable housing at St. Kevin's and inclusion of Dudley and Upham's Corner streetscape improvements in City's capital plans and budget.
- MOUs with Tufts University to undertake concrete research projects on behalf of DNI community development projects.
- Increased capacity of DSNI resident and youth leaders to play leadership roles in advocating and engaging other residents in neighborhood revitalization efforts.

Evaluation: Evaluation and monitoring of the impact of the neighborhood planning work will fall to the Sustainable Development Committee, which includes board members of DNI and DSNI and 15-20 neighborhood residents, and the director of DNI. The committee meets regularly to review development projects and track progress towards the priorities expressed in the Plan. Resident engagement is tracked through sign-in sheets and leadership is tracked in terms of how many residents are taking roles in setting agendas and facilitating meetings. The development plans discussed above will be written documents that will outline priorities for each site.

Goal 3 Outcomes/Impacts 2019-2021

- Complete the physical build-out of the Dudley Triangle with completion of new affordable housing and commercial projects
- 4-6 additional parcels added to the Urban Agriculture Pilot initiative with Urban Farming Institute and Trust for Public Land to transform vacant lots into urban commercial farms. Increased access to locally-grown food for area residents;
- Completion and sale of new affordable homes at 31-33 Woodville, developed in partnership with YouthBuild Boston and Madison Park Vocational Tech High School;
- Strengthen communications and management of the community land trust through quarterly DNI Board meetings, regular leaseholder meetings and resource fairs, and improved management systems;
- Development of revised business plan that ensures sustainability of DNI;
- 50 families in local schools each year are able to stabilize their housing situation through support from *No Child Goes Homeless* initiative. Students in those families experience improved attendance at local schools;
- Maintenance of low foreclosure rates of DNI homeowners through 1-1 advocacy and group trainings;
- Greater Boston Community Land Trust Network is expanded with participation of 8-10 neighborhood groups and emerging CLTs. City of Boston adopts pilot initiative to support communities interested in CLT model;

Evaluation

Progress in the *No Child Goes Homeless* initiative will be tracked by Project HOPE using their Efforts to Outcomes tool. Participation of DNI homeowners in stewardship and foreclosure prevention activities will be tracked with sign-in sheets. Residents in DNI projects are also tracked using *WeaverPRM* asset management software and maintained by DNI's Director of Operations and Stewardship. This software will also help DNI manage the urban farmland and new housing that is planned to come into our portfolio over the next three years.

SECTION 6: COLLABORATIVE EFFORTS TO SUPPORT IMPLEMENTATION

The 25,000 residents of the Dudley neighborhood continue to be our primary partners for all of our housing and economic development initiatives; this number will expand during the project period as we accelerate our work in Uphams Corner. Residents play a leadership role in all aspects of the work, beginning with their service on the Board of Directors and committees. Through 1-1 engagement and neighborhood meetings, DNI holds itself accountable to resident voice and is able to build on the knowledge and experience of residents, youth and merchants.

To implement the Plan, DNI will sustain and expand partnerships with a number of partners. These include neighborhood associations, nonprofit groups, CDCs, philanthropic organizations, and municipal agencies.

Specific partners include:

The City of Boston Department of Neighborhood Development (DND) will co-sponsor a neighborhood planning process to prioritize uses of more than 200 vacant City-owned parcels in the DNI target area. DND will also work with DNI to successfully designate a development partner for the former Citizens Bank building in Upham's Corner.

The City of Boston Boston Planning and Development Agency (BPDA) will co-sponsor a neighborhood planning process to develop the RFPs for the parcels in Upham's Corner as well as work closely with DNI to prepare agendas and facilitate the Working Advisory Group meetings. BPDA will work with the WAG to successfully designate a development partner for the Strand Theatre and Upham's Corner Library parcels.

Project Hope will continue to collaborate through their Workforce Development & Employer Partnership initiative to support residents with job readiness training, access to career ladder job opportunities, and ongoing case management support for a full year after job placement. They will also continue to be the lead partner on the *No Child Goes Homeless* initiative to provide supports and advocacy to families in local schools facing eviction and homelessness.

Upham's Corner Main Streets plays a key role in promoting local businesses and the vitality of the commercial district. They will continue to provide technical assistance to

local businesses and connect them with public and private resources.

The Food Project operates the Community Greenhouse and the Brook Ave./West Cottage Farm, through a long-term lease with DNI. The Food Project collaborates with DNI and other partners to provide access to healthy, local food to area residents, with food from the farm and greenhouse sold at a weekly farmers market on the Dudley Town Common.

SECTION 7: INTEGRATION OF ACTIVITIES/CONSISTENCY WITH COMMUNITY STRATEGY AND VISION

The Community Investment Plan described in this application is an outgrowth of thirty years of resident-led planning in the Roxbury/North Dorchester neighborhood, through a variety of processes that have involved thousands of residents.

DSNI's comprehensive plan for community revitalization was crafted in 1987 and involved hundreds of residents. That plan outlined the blueprint for a locally-based economic development strategy based on the concept of an *Urban Village*. The Dudley Neighbors Inc. community land trust was formed directly out of the community planning process to serve as a vehicle for carrying out the neighborhood's development priorities.

In 1996, DSNI hosted a series of *Urban Village Visioning* sessions to revisit and update the original vision. Those sessions were designed to take the original plan through an iterative process that would help residents discover the points of leverage that are capable of transforming their vision of a vibrant multicultural urban village into strategic plan and ultimately into reality.

The original vision has been reviewed and updated several times since 1996 and is overseen and monitored by DSNI's Sustainable Development Committee, which has developed design standards and a community impact assessment tool to analyze public and private development projects in the neighborhood. This Committee meets regularly to review proposed developments.

The strategies contained in this application are also fully aligned with larger revitalization plans developed in Roxbury and Dorchester. Chief among these planning initiatives are *The Roxbury Strategic Master Plan* and *The Fairmount Indigo Planning Initiative*.

The Roxbury Strategic Master Plan was the product of a three-year partnership with community members, resident groups and city and elected officials to create a comprehensive blueprint to promote economic, social and educational opportunities for the people of Roxbury. The Plan highlighted a set of goals and objectives that is serving as a guide to shape future policy and development activities over the next ten to twenty years. The Plan lays out a framework of strategies that capitalize on the neighborhood's many resources and assets, with the goal of creating a more socially and economically healthy Roxbury community. The Roxbury Strategic Master Plan Oversight Committee meets regularly to advance and oversee the Plan's objectives such as the development of

important land parcels, the creation of economic development initiatives and the provision of new job opportunities.

Leaders of DSNI and DNI were very active in the planning initiative and brought priorities and lessons learned from the Dudley experience to include in the larger Master Plan document. The goals of the Master Plan and the goals of the CIP are inextricably linked, including development without displacement, mixed-income and mixed-use development, community benefit agreements, and creation of small business and employment opportunities for local residents.

The Fairmount Indigo Planning Initiative is a multiyear effort begun in 2012 to develop short and long-term strategies for improving capital investment and job access along the 9.2 mile Fairmount Indigo commuter rail line, which links South Station to Readville, crossing through Roxbury, Dorchester, Mattapan and Hyde Park. Leaders from DSNI and DNI have been engaged in this planning effort from the beginning and have helped engage hundreds of residents and merchants in the initiative. The Upham's Corner station lies in the heart of DNI's target area and has been the focus of intensive planning over the past year, culminating in the release of the Upham's Corner Station Area Plan in early 2014. This Plan establishes a framework for future improvements and investment to enhance both the commercial center of Upham's Corner and the surrounding neighborhoods. The Station Area Plan establishes strategies for new transit-oriented development near the Upham's Corner MBTA rail station, new mixed-use development in the Main Streets district, new infill residential development in the surrounding neighborhoods, streetscape improvements to critical connections and an expanded open space network.

Most recently, the City of Boston's "Imagine Boston 2030" master planning process identified Upham's Corner as a pilot Neighborhood Arts Innovation District in their final report and has undertaken an implementation process to guide development in the district in line with the community's vision.

SECTION 8: FINANCING STRATEGY

The 25-year track record of DNI in bringing residents together to develop a common vision and partnering with nonprofit and for-profit developers to implement that vision demonstrates the value of long-term planning and connecting planning work with specific financing plans for implementation. In this way, DNI has been able to create momentum from one development project to the next and has been able to systematically build out the community vision over a period of many years. As part of the development of the Community Investment Plan, DNI has continued to focus on opportunities to finance the implementation of the Plan and strategies for sustaining our organizing and development work over the long-term.

In addition to the Community Investment Tax Credit Program, DNI has identified a number of financing strategies to implement the Plan. These include:

- Continue our approach of seeking support from a diverse pool, including foundations, corporations, and individuals;

- Identify new foundation sources to support specific elements of the Plan;
- Strengthen earned revenue through establishment of DNI as a “central server” Community Land Trust (CLT) that provides TA and administrative support to newly emerging CLTs;
- Maintain and expand partnerships with legal and development entities that provide pro bono support for our work (eg; Goulston & Storrs provides more than \$60,000/year in pro bono legal services)
- Leverage the CITC Program to undertake an aggressive individual donor campaign to support the goals and activities listed in the Plan.

Anticipated funding sources for 2019 (not including CITC allocation) include:

	<i>Committed</i>	<i>Likely</i>
Private Foundations	\$212,438	\$225,000
Administrative income from existing projects	\$115,000	\$55,000 ¹
Real estate project income and development fees	\$80,000	\$135,000
Individuals and Events		\$50,000
Pro Bono services		\$65,000 ²

To maximize our ability to leverage a CITC allocation, we are working to prioritize fundraising from major donors. DNI, a community land trust in one of the poorest urban neighborhoods, has not previously pursued this line of fundraising in the necessary ways. However, recent Board-led and staff-led efforts, the hiring of a consultant with 20+ years of fundraising experience, and the acquisition of our first commercial space has brought us new attention and a connection to Resource Generation, a multiracial membership community of young people (18-35) with wealth and/or class privilege committed to the equitable distribution of wealth, land, and power. We are already seeing considerable returns from this new connection and \$150,000 in CITC funds would allow us to tell a compelling story and offer financial incentives to these new donors.

SECTION 9: HISTORY, TRACK RECORD AND SUSTAINABLE DEVELOPMENT

Our work over the past 30 years has resulted in reclaiming physically devastated areas; rebuilding housing in the context of an urban village; developing permanent housing affordability, and protections against foreclosure (also referred to as “development

¹ Only about 50% of our landowners contribute their ground lease fees annually.

² In the last FY18, our attorneys contributed \$75,000 in pro-bono assistance. We anticipate similar in the coming year.

without displacement”). Today, those devastated lots are cleaned up and home to more than 226 families living in *permanently* affordable housing as well as parks and a greenhouse. Most of the 1,300 abandoned parcels identified by residents in the 1980’s have been permanently transformed into over 226 new high quality affordable housing units, a community greenhouse and farm, parks, playgrounds, gardens, an orchard and other public spaces.

Specific examples of successful development projects sponsored by DNI include:

- Winthrop Estates: 36 units of affordable homeownership housing completed in 1994.
- Stafford Heights Cooperative: 41 units of limited-equity cooperative units, developed by Nuestra Comunidad Development Corporation.
- Dudley Village: 50 units of mixed-income rental housing developed by Dorchester Bay EDC.
- Woodward Park Homes: Woodville/Julian Homes, Brookford/Dalin/Dean Homes- 52 units of affordable homeownership housing developed in partnership with New Boston Housing Enterprises.
- Community Greenhouse: 10,000sf greenhouse developed on the site of a former Brownfields site with funding from Mass Highway Department to settle EPA lawsuit over environmental violations at MHD facilities. The Greenhouse is operated by The Food Project.

DNI’s Community Investment Plan is fully aligned with the Commonwealth’s Sustainable Development Principles and touches on a number of the specific principles articulated in Exhibit 5. For example, the original Dudley Urban Village plan focused on concentrating development in a compact geographic area in order to maximize impact. The 62-acre Dudley Triangle was selected for intensive planning due to the large number of blighted vacant lots. 30 years later, DNI owns 32 of the 62 acres and has implemented a mixed-use development strategy that includes 226 affordable homes, 1.5 acre community farm, 10,000sf greenhouse, Trina Persad Playground, nonprofit office space, and commercial spaces. Rather than just focusing on housing, the Triangle has been developed in a way that provides many of the amenities of a vibrant urban village.

Another example is the commitment of DNI to advancing equitable development that benefits all residents in the neighborhood. Our work is based on the theory that place matters, and that the ability for residents to live in a better Boston is very much determined by the quality of opportunities and the resources of our neighborhood. Our commitment to transforming neighborhoods and to ensuring success for all of our families is propelled by our understanding that *closing the equity gap is central*. We are committed to resident leadership and maximum resident participation, across racial groups within the community.

A final example is the commitment of DNI to expand housing opportunities to meet the needs of people of all income levels and household types. Of the 226 homes on the land trust, 96 are homeownership units, 77 are cooperative and 53 are rental, with residents’ incomes ranging from 30% to 100% of Area Median Income. In this way, DNI is living

up to the original vision of creating opportunities for all families to remain and thrive in the neighborhood.



Community Investment Tax Credit Application November 2018
Community Investment Plan: Statement of Progress (Years 2015 - 2017)

Goal 1: Engage families and businesses to increase income and assets and promote economic stability in the neighborhood

The Fair Chance initiative engages Land Trust and Dudley residents in an innovative partnership with Family Independence Initiative to increase assets and household income for families. Fair Chance is part of a strategy to ensure that as housing costs increase, residents are prepared and able to reach their own financial and housing goals. As of 2017, there were 120 families enrolled in Fair Chance Families meet monthly in cohorts of 10-12 and supported each other in reaching personal, professional, and social goals. On average, we have seen an increase in total assets from \$452 to \$5,899 and an increase in monthly savings account balance from \$3.43 to \$1,555.

Through regular office hours, DNI staff works closely with CLT homeowners to ensure that they have knowledge of and access to resources available. DNI also hosts regular events for homeowners, where families can learn more about these resources and meet with the providers themselves, such as the DNI Annual Event hosted in May. We have built key relationships with United South End Settlements and Kit Clark House to enhance supports available to elderly homeowners including home improvement loans. In addition, we continue to support homeowners through the application for the City of Boston HomeWorks program.

Members of the Greater Boston Community Land Trust Network, including DNI, have hosted “Community Land Trust Banker’s Forum,” which featured panelists including Boston Private Bank, the City of Boston, Community Banking Council, with the goal of education Banks about the CLT model and increasing the number of banks who are willing to issues loans to homeowners and invest in Land Trust projects.

Through the Local Manufacturing Initiative a partnership between DSNI, Local Enterprise Assistance Fund (LEAF), Commonwealth Kitchen and Project Hope, these past 18 months we have supported businesses, entrepreneurs and other residents who are interested in entering the food industry. This unique partnership, leveraged the experience of each of the organizations, including DSNI’s deep engagement with residents and CLT homeowners, to develop opportunities for residents to receive business planning support, workforce development training and food manufacturing experience.

[2018 Note: After the project period of 2015-2017, FII continued with cohorts having a 100% participation rate. Families that completed their two-year partnership with FII increase their employment income by an average of 71%, decreased their use of subsidies by 51% and increased their assets six-fold. Homeownership rose from 16 to 23 families. 12 FII members ran for the DSNI Board of Directors and 8 were elected.]

Goal 2: Plan physical and economic development of the neighborhood

In 2016, DNI added its 226th home onto the CLT at 16 North Ave in Roxbury. This home was possible through partnerships with Youth Build Boston, Madison Park High School, the Boston Carpenters Union, and Boston Private Bank. Through DSNI's Sustainable Development Committee and with members of DNI's board of directors, residents determined what the house should look like and what amenities should be included based on resident standards of quality housing. Youth Build Boston, was hired and they, in turn, hired students from Madison Park Vocational High School, to build the home.

DNI has once again partnered with Youth Build Boston, who is building the 227th CLT home on Woodville Street in Roxbury. [Note: We anticipate closing on this property in December 2018 or January 2019.]

In 2016, DNI also acquired public land on Dudley Street and engaged residents and other stakeholders in determining the usage of the space. We held a bidder's conference and announced Dorchester Bay EDC as the developer for the site. The site is expected to be completed in late 2018- early 2019. [2018 Note: anchor tenants are being identified to move towards a groundbreaking in the near future.]

We are currently engaging with potential tenants including local business owners that are looking for bigger and more affordable locations. On the site currently is a public art installation designed by local artists Nancy Guerera and Kalamu Kieta which says "Our Tierra Livri" or "Our Liberated Land" in the three main languages of the community- English, Spanish and Cape Verdean Creole. Kalamu Kieta, who is now the Community Engagement Organizer for DSNI and Ramona Alexander, Arts & Culture Manager, are continuing to lead efforts around creative placemaking that uses the arts and creative expression to engage residents in land use planning that is happening in the neighborhood.

One of our greatest and recent accomplishments is that following extensive community organizing and planning efforts led by DNI and DSNI, for the first time the City of Boston prioritized CLTs in projects outside of the Dudley Triangle, which can set the precedent for prioritizing CLTs in future RFPs across the City. For vacant parcels on Magnolia Street in Dorchester, the City's Neighborhood Homes Initiative RFP read: "the City has reviewed the potential ownership mechanism for these parcels and determined that the use of a community land trust would best accomplish its goal of long term affordability.... To achieve this public benefit, the City seeks responses which include as a principal either an existing Community Land Trust (CLT) or provide for the creation of

a new land trust. As a result, the City expects that all of the affordable parcels offered here shall be held in a community land trust.”

DNI recently won the bid and in the next year, 12 of the 15 vacant lots on Magnolia street will be transferred to the land trust and reserved for the development of permanently affordable homes. These will mark not only the first homes to be built outside of the Triangle but also the biggest development project for the land trust in 8 years. [2018 Note: KNG has been chosen as the developer; 12 units of affordable housing will be permanently transferred into the CLT.]

Goal 3: Sustain the operations and expand the scope of the Dudley Neighbors Inc., Community Land Trust, to promote development without displacement and serve as a model for other communities

DNI made a historic step forward by acquiring the Citizens Bank building in Boston’s neighborhood of Upham’s Corner, at 572 Columbia Road. With support from the City of Boston’s Acquisition Opportunity Fund, DNI was able to compete in the private market and purchase a large privately-owned property and transfer it onto the CLT; this is the first time DNI has been able to compete in the private market.

With the designation of Upham's Corner as a Neighborhood Arts Innovation District and City-sponsored planning around the Strand Theatre, DNI has the opportunity to create a mixed-use project at the Citizens Bank site that will support and complement efforts to strengthen Upham's role as an affordable, vibrant center for arts, culture, and creative economic development. DNI continues to work with the City of Boston, Upham's Corner Main Streets, and numerous neighborhood associations and community organizations to engage the residents, artists, and merchants in planning the future of this site, as part of a larger effort to implement priorities that have emerged from previous planning processes such as the Fairmount Indigo Planning Initiative. Ideas so far include new affordable housing, including possibly artist live/work space, studio and rehearsal space, locally-owned businesses, accessible parking, and community space for local organizing. DNI staff and Dudley residents sit on the Working Advisory Group (WAG) for the implementation of the innovation district and hold the key responsibility of ensuring that the implementation plan is accountable to the community and represents the vision and voice of residents.

We expanded our CLT strategy through a new initiative called the Greater Boston Community Land Trust Network (GBCLTN). Community organizations throughout the Boston area regularly come to DSNI seeking resources to leverage DNI’s CLT model to prevent gentrification, secure land for affordable housing and build economic power in their own communities. But those requests have accelerated along with the devastating rates of rent increases, and displacement, which disproportionately affect working class people of color across the city. We realized it was time to expand the scope of our own CLT and work with allies to make a citywide push for the kind of community control over land dispossession that has been won in the Dudley neighborhood. In Spring of 2016, we partnered with ten other community organizations to launch the GBCLTN,

which will foster the creation of new CLTs in Boston and advocate for policies that promote long-term affordability. GBCLTN aims to create long-term systematic change that will redistribute land and property, and therefore economic power, to those who traditionally have not had access to it. Through the GBCLTN, DNI leverages its accomplishments and the relationships we have built over the past three decades in order to expand the Land Trust model and influence changes that ultimately benefit communities and residents most at risk of being displaced.

DNI has leveraged the CITC program to push us to develop a organization-wide fundraising strategy that focuses on long term sustainability of the organization. This includes pursuing additional private funding opportunities and building relationships with local and national foundations. The CITC program allowed DNI to hire additional capacity to support DNI's operations. In 2016, DNI hired Ben Baldwin, a Tufts University Urban & Environmental Planning & Policy graduate as the organization's Project & Operations Manager.

Utilization of Previous Credits Awarded

During the 2015-2017 we used 94% of our allocation.