



**CODMAN SQUARE**  
NEIGHBORHOOD DEVELOPMENT CORP

# STRATEGIC PLAN

**2022-2025**

*587 Washington  
Street, Dorchester  
MA 02124*

# Strategic Plan 2022- 2025

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## I. Executive Summary

In 2021, Codman Square Neighborhood Development Corporation (CSNDC) celebrated its 40th anniversary. Throughout this time, CSNDC has been working with local residents, businesses, and organizations to foster a healthy, thriving, and equitable community by:

- developing housing and commercial spaces that are affordable and safe;
- creating economic opportunity for low- and moderate-income residents of all ages;
- fostering community engagement to build the capacity and leadership of local residents and;
- promoting environmental and energy sustainability of the local environment for future generations.

CSNDC's history is characterized by a concentrated focus on physical development of its service area, which continues. With growing concerns about gentrification and displacement – and the current unrest caused by long standing racial disparities and injustices which are presenting in disproportionate COVID-19 health impacts, economic insecurities, and police brutality, CSNDC has become increasingly focused on social, economic, political, and racial inequities within the community it serves.

### Strategic Planning Process

A Strategic Planning Team composed of board members and senior staff, worked closely with Consultant, Judy Freiwirth, Psy.D., Principal of Nonprofit Solutions Associates and Gail Latimore, Executive Director throughout the process to help design and coordinate the planning. The planning included two comprehensive assessments; the first was a strategic assessment, focused on collecting data to answer the identified key strategic questions for CSNDC's direction. As part of this process, the consultants conducted 33 interviews with key external stakeholders and focus groups. Subsequently, a feasibility assessment was conducted with another 38 stakeholders to test a set of proposed "north star priorities" (key priorities against which an organization can align its culture, people, and structure for the future) for CSNDC and its implications for residents and CSNDC's funding and capacity. With the use of "strategy screens," priority strategic directions were chosen by the Board and staff, resulting in the creation of a dynamic and flexible strategic plan.

### Future Strategic Directions

Informed by two comprehensive community assessments and extensive feedback from key stakeholders, CSNDC will be shifting its primary focus from individual resident change through individual services to a model which centers on larger, systemic change within CSNDC's community. The new theory of change places co-empowerment, collective action, and systemic transformation at its core while also addressing resident displacement and gentrification by significantly increasing the amount of affordable housing development in Dorchester and other underserved communities.

## North Star Priorities

Over the next three years, CSNDC will be expanding and scaling up two areas of work as its “North Star Priorities”, to increase CSNDC’s ability to address the root causes of racial and economic inequity and impact system change within the Dorchester community. The two-prong foci include: (1) scaling affordable housing/real estate development work and (2) increasing and expanding constituent engagement in advocacy and organizing work related to root causes and will link these priorities in a cohesive way. For example, all CSNDC staff will be trained in community organizing and will be considered “organizers,” encouraging constituents who receive services or housing from CSNDC to become active in CSNDC’s organizing campaigns by first participating in the Resident Leadership Institute or the newly developed, Anti-Racism/Equity Army Academy.

Over the next three years CSNDC will scale up its affordable housing development to address increasing gentrification and resident displacement. According to a new research report by the National Low Income Housing Coalition, there are only 47 rental homes for every 100 households earning \$32,000 or less in Massachusetts. According to this new research, Massachusetts ranks number three as the most expensive state in which to live, with hourly workers needing to make at least \$36.24 an hour in order to afford an average two-bedroom apartment<sup>1</sup>. CSNDC is seeking to impact this situation by significantly increasing the number of affordable housing units in Dorchester and other underserved communities through joint ventures and partnerships, expiring use properties, traditional and non-traditional capital access models, existing portfolio capital tapping, and major donor real estate capital cultivation. CSNDC aspires to at least double, and ideally triple the number of units developed per year over the next two to four years.

At the same time, through its other “North Star “priority- community organizing and base building, CSNDC will significantly expand its base of active and engaged residents to effectively influence, develop, and advocate for systems change and policies focused on more affordable housing, tenant rights, economic and racial justice, environmental/climate justice for the Codman Square/South Dorchester community. There will be special emphasis on BIPOC (Black and Indigenous People of Color). CSNDC will build a base of at least 100 activists and trained resident leaders and community organizers or “Equity Army” to lead CSNDC community organizing campaigns which are designed by residents, mobilizing the community on these issues.

These North Star priorities represents a significant transformation for CSNDC. Since much of its current funding is tied to the direct services it provides to individual residents, the organization will maintain most of its economic mobility services during this period through an integrated, “one-stop model” – a Financial Opportunity Center model. At the same time, over the next three years, CSNDC will pilot the transition of individual programs within the CSNDC Economic

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<sup>1</sup> *The Gap: A Shortage of Affordable Homes*, Research report, April 2022. National Low Income Housing Coalition.

Development Department to align with the North Start priorities and assess the impact on Dorchester residents, service delivery, CSNDC's reputation, and the organization's finances.

## Updated Mission Statement

To reflect the new Theory of Change for CSNDC, the Board of Directors revised its mission statement to highlight its priority focus on scaling up affordable housing development and community organizing/base building, resident mobilization, and advocacy towards effective systems change in the community. The following is the updated Mission Statement for CSNDC:

*Codman Square Neighborhood Development Corporation is a grassroots community organization committed to developing affordable housing and fighting for racial and economic justice by building community power, especially of low- and moderate-income communities of color in Dorchester. Through developing resident leadership, organizing in the community, promoting economic mobility services, and advocating for local environmental justice, we build collective resident power to effect systemic change and transform society.*

## Key Highlights of CSNDC's Three-Year Program Directions

### Affordable Housing Development

To address increasing gentrification and resident displacement, CSNDC seeks to significantly increase the number of affordable housing units in development from the current 40 units per year average to 80-100 units per year. CSNDC will explore expanding its affordable housing development work beyond the Codman Square service area of Dorchester into other underserved neighborhoods or localities that have limited organizational capacity to develop housing. The purpose is to assist underserved individuals/families and neighborhoods, increase affordable housing development opportunities, and offset increasing gentrification and low-moderate income resident displacement. To achieve the scaling of affordable housing development, CSNDC will explore joint ventures and partners, investigate the acquisition of expiring use properties, engage in capital innovation and major donor real estate capital cultivation, and tap into existing portfolio capital.

### Community Organizing and Base Building

CSNDC will significantly expand its base of active and engaged residents and other constituents to effectively influence, develop, and advocate for systems change and policies focused on social and racial justice, and the socio-economic rights and well-being of the Codman Square/South Dorchester community, particularly for BIPOC (Black and Indigenous People of Color). Through the strategies of organizing/base building and advocacy, CSNDC will build and mobilize community power to change policy, legislation, and systems change resulting in the

following: (a) increased housing affordability and access, anti-displacement/housing retention, rent stabilization; (b) increased and reparative racial justice/equity issues especially related to community development policy and resource allocation; (c) economic justice; and (d) climate and environmental justice in the Codman Square and South Dorchester communities.

CSNDC will have an integrated “scaled up” strategy which includes building a large base of trained, resident leaders and organizers – an “Equity Army,” who will be trained using political education and skill building (e.g., using popular education<sup>2</sup> models) for learning community organizing and how to design and implement organizing campaigns and advocacy. The base of organizers and resident leaders will lead multiple CSNDC community organizing campaigns to affect system change through increasing public awareness, mobilizing the community with direct action, developing policy, using advocacy strategies, developing new and emerging community organizers to continue to address systems change.

### Eco-Innovation

In the next three years, in alignment with CSNDC’s North Star priorities, CSNDC’s Eco-Innovation District (EID) work will transform itself to use a community organizing/base building model. The organization will scale up its climate and environmental justice work and connect more closely with the Community Organizing and Resident Engagement Department to identify and train constituents on campaign and strategy development related to policy and systems change, with a specific focus on energy and environmental justice issues. EID clients will be encouraged to participate in the Resident Leadership Academy and/or the Anti-Racism/Equity Army Academy, as a first step towards engagement in collective action.

At the same time, the Department will continue to provide a unique set of economic mobility services directly, as well as through a “Hub and Spoke Model” and will align the service provision goals closely with the resident leadership development and community organizing campaigns and goals. To move to a base building and community organizing model for the Eco-Innovation District work, some of the current direct service EID programming may, via a ‘Hub and Spoke’ approach, transition to partnerships and other arrangements. As the inner circle, or ‘hub,’ CSNDC will serve as a central support for fundraising, program modeling and acquiring funds to support the service program in question. CSNDC also will serve as the “hub” or manager of funder relationships and centralized reporting, while CSNDC contracts out the service delivery programs to partnering organizations (the spokes). During the next three years, exploration with potential partners will take place, while continuing to evaluate the viability of the transition.

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<sup>2</sup> Freire, P. (1970). [\*Pedagogy of the Oppressed\*](#). New York, Continuum

## Economic Development

The Economic Development program will evolve into a ‘one stop model’ shop for all CSNDC constituents’ (residents and businesses) using a Financial Opportunity Center model to address their economic mobility needs in an integrated and co-located approach. The current services include employment and computer skills, housing counseling, financial capabilities, home rehab and small business development, products to help build and protect credit, savings and assets, and case management services to facilitate connections to basic need supports such as emergency rental assistance, utility assistance, nutritional assistance, and childcare.

The program will be a ‘connector,’ helping residents not only connect to the services they need, but also support resident understanding of the systemic issues underlying their problem or situation. With this understanding, residents will be encouraged to join together with other residents in collective action to address those root causes and mobilize for systems change. The residents will be actively encouraged to participate in the Leadership Development Institute/Anti-Racism Academy and then in resident-led community organizing campaigns supported and organized with CSNDC.

The staff will design and implement a pilot program to transition identified services to partnering organizations. The pilot will be evaluated based on the impact on constituents, residents, funding, and CSNDC’s reputation within the community. Based upon the results of the evaluation, additional services may be identified for transition to partner organizations in order for CSNDC to focus on its two North Star priorities.

## Case Management

Case Management will use a hybrid model that serves as a clearinghouse for all referrals from other CSNDC departments and will also coordinate between external services and residents -- connecting residents to both internal and external services through established partnerships with social service agencies. Once the resident’s immediate needs are met either internally or externally, the CSNDC case manager will encourage the resident to become actively engaged in CSNDC’s Resident Leadership Institute and community organizing campaigns. By helping residents understand the solution to their problem or situation can best be achieved by addressing systemic root causes, the goal will be to engage residents to join with others, working together through collective action to impact deeper change. Case Management will no longer be a stand-alone department; instead, it will be shifted under and supported by the Economic Development Department.

## II. Summary of Strategic Planning Process

The strategic planning process resulted in a significant shift in direction for CSNDC with a new theory of change, which emphasized prioritizing two North Star focal areas: (1) scaling affordable housing development, and (2) scaling organizing, base-building, and advocacy work. As a result of the planning process, the theory of change for CSNDC now includes and prioritizes a focus on systems change and collective action led by local residents and constituents about issues faced by themselves and other community residents such as racial equity, displacement, right to affordable housing, and climate/environmental justice.

The CSNDC theory of change also significantly increases the planned efforts to develop new affordable housing for residents in Dorchester and other underserved neighborhoods. While direct services currently offered will continue to be provided, over the next two years (by 2024), many of these services will be evaluated for transition out of the organization and into partnerships with other nonprofits, or civic associations. This will ensure CSNDC can focus on its two North Star priorities --scaling affordable housing and community organizing/base building and advocacy.

The Strategic Planning Team was composed of board members and senior staff, including the Board Co-Chair, three other board members, and all nine members of the senior staff. The Team worked closely with Consultant, Judy Freiwirth, Psy.D., Principal of Nonprofit Solutions Associates and Gail Latimore, Executive Director throughout the process to help design and coordinate the planning. The phases included the following:

- The Strategic Planning Team in collaboration with the Board, identified Key Strategic Questions (see Appendix) to help guide the planning process, and to inform the design of the comprehensive strategic assessment.
- At the beginning of the planning process, Executive Director Gail Latimore introduced the strategy of focusing CSNDC's work on "North Star" priorities to the Board and staff, that is, CSNDC would focus, as a strategic priority, on two to three priority programs or focus areas rather than providing over 40 different programs and services that address a multitude of issues as is done currently. This focus would allow CSNDC to scale up and expand those programs and dramatically increase the impact for the community it serves. Based on the urgent and dire gentrification and displacement crisis the community is facing, as well as the deep-seated inequities stemming from racism, the Executive Director recommended a focus on two areas for significant expansion to impact systems change most effectively: (1) affordable housing development and (2) community organizing and base building, while, gradually reducing CSNDC's other programmatic services. With agreement from the Board of Directors, the organization agreed to seek feedback not only about the strategic questions but also for testing key stakeholder and community support for these potential North Star priorities.



- Guided by the Key Strategic Questions, the Consultant and Strategic Planning Team designed and implemented a comprehensive, highly participatory strategic assessment which included 33 interviews, four focus groups, research, and an extensive document review. The Strategic Planning Team members and Consultant conducted the interviews with a diverse range of key community stakeholders. These included city and state elected officials, foundation program officers, leaders of state agencies, community organizers, for profit developers, community development (CDC) leaders, CDC and other nonprofit real estate development staff, and other community leaders. Additionally, residents were interviewed and there were several staff and board focus groups, and individual interviews. Additional input from the full staff occurred intermittently throughout the planning process.
  
- After an in-depth analysis of the data and feedback by internal and external stakeholders, CSNDC began to consider focusing on “North Star” priorities- that is, scaling its affordable housing development and expanding its community organizing/base building and advocacy work. Both external and internal stakeholders supported the North Star priorities and provided valuable feedback regarding the other Key Strategic Questions.
  
- There are multiple implications for constituents, partnering organizing, and funding with such a significant transformation. Therefore, CSNDC decided to first conduct a second assessment - or “Feasibility Assessment” to evaluate the feasibility of such a significant transformation from being primarily a service provider organization, to one that now focuses on systems change and advocacy. The second assessment’s goals were as follows:
  - Assess the feasibility of focusing CSNDC programmatic directions on North Star priorities - scaling organizing/advocacy campaigns/base building and scaling real estate affordable housing development.
  - Evaluate the options for transferring current CSNDC’s services to a variety of partnerships, while preventing loss of direct services to CSNDC constituents.
  - Research future funding opportunities for community organizing/ base building and advocacy, and affordable housing development.
  - Consider potential impacts on CSNDC’s reputation as perceived by various stakeholders, should CSNDC shift from direct service delivery to the North Star priorities.
  
- The Feasibility Assessment consisted of conducting 38 additional interviews with a diverse group of stakeholders, including current and potential funders/foundations, community organizers, nonprofit and corporate/for-profit developers, community development organizations, potential partnering nonprofits for services transition, current residents using CSNDC’s services, and Boston City officials.

- The senior staff, with assistance from the Consultant, developed a series of strategy screens with a set of criteria for selecting priorities and incorporated relevant research findings from the Consultants research.
- The Feasibility Assessment findings demonstrated that there was significant support from internal and external stakeholders for the two North Priorities --affordable housing development and community organizing-- as well as other critical programs aligned with CSNDC’s new theory of change. The Team also decided that given the funding base for CSNDC’s current services, the organization would continue to provide direct services through 2024. Based on the Feasibility Assessment, they selected priorities using the strategy screens, and other research findings provided by the Consultant,
- In 2024, the services and funding opportunities for the North Star priorities will be evaluated. Based on this evaluation, the CSNDC’s direct services may be transitioned to other organizations, or other partnering arrangements, such as subcontracting, will be assessed.
- Informed by the two assessments, senior managers developed comprehensive, three-year strategic directions and benchmarks of success for their area of focus, which were incorporated into the strategic plan.

### III. Key Strategic Questions

The strategic planning process was organized around a set of key strategic questions to help shape CSNDC’s Future. See appendix for list of questions.

### IV. Strategic and Feasibility Assessment Summary

Highlights from both the Strategic Assessment and the subsequent Feasibility Assessment are described in the Appendix.

### V. New Theory of Change and New Strategic Directions Based on North Star Priorities

Based on the strategic assessment findings and other feedback from stakeholders, as a critical element of the strategic planning process, CSNDC decided to shift its work from providing over 40 different services through a “multi-service center model” focused on individual change, to a co-empowerment for community power model through its “North Star” priorities. The purpose of the North Star priorities is to increase CSNDC’s ability to address root causes of racial and economic inequity and impact system change with the community CSNDC serves.

The two transformational priorities are as follow:

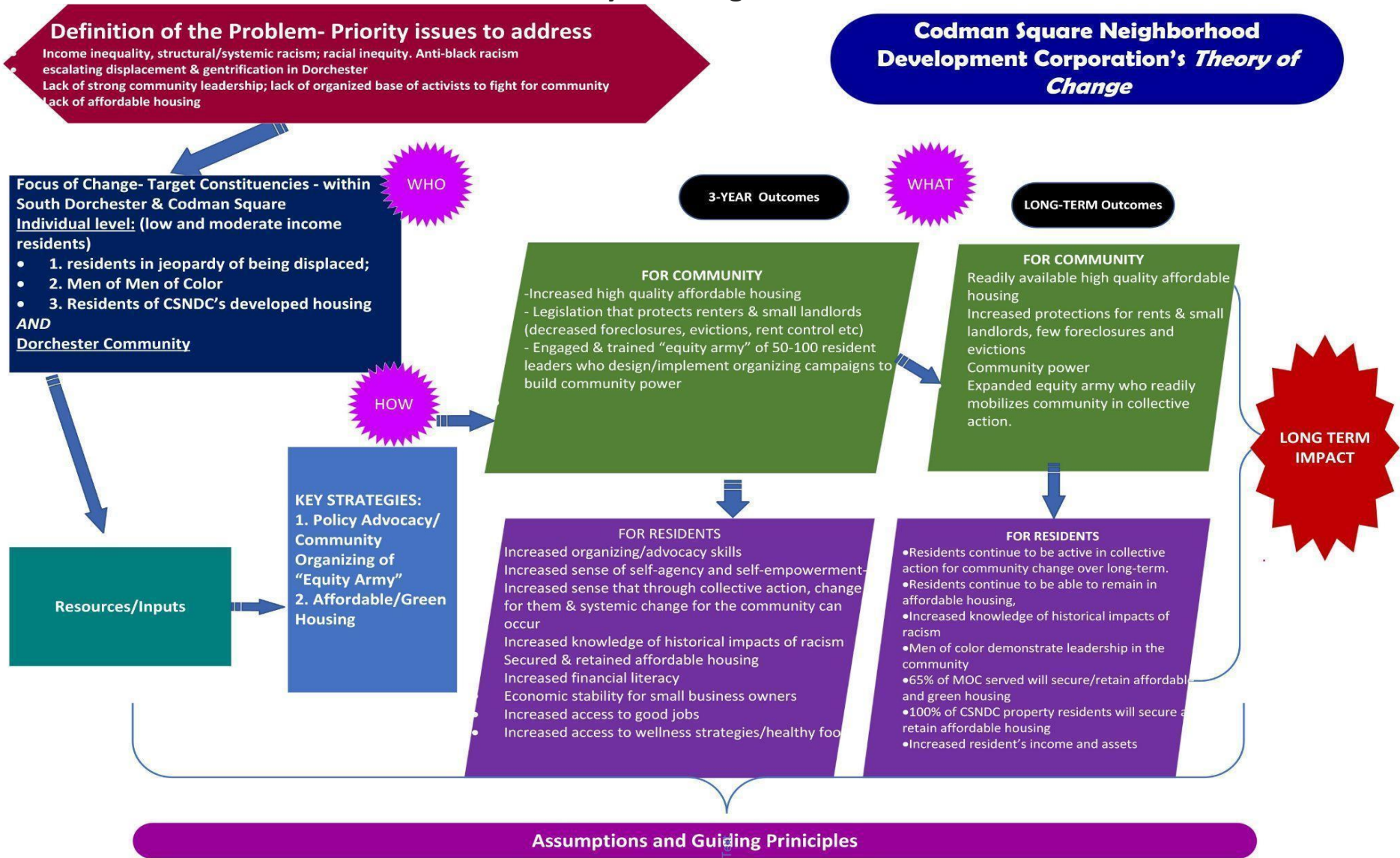
- 1) Scaling affordable housing development in Dorchester and surrounding communities.
- 2) Scaling and expanding community organizing/base building and mobilizing community residents to drive system change more effectively. CSNDC's theory of change will be transformed from an individual model of service operating from a "charity mode" to an organization focused on empowering residents as leaders in collective action and transformational change. CSNDC will focus on developing new resident leaders, who in turn will lead comprehensive CSNDC organizing campaigns as part of a powerful, "Equity Army" collective. All staff will be considered "organizers," encouraging constituents who receive services to participate in the Resident Leadership Institute or the new Anti-Racism/Equity Army Academy (AREA).

These priorities represent a significant transformation for CSNDC. As much of its current funding is tied to the services it provides to individual residents, the organization will maintain most of its economic mobility services during this period, but will transition the mode of service delivery to a Financial Opportunity Center model. At the same time, CSNDC will expand and scale its affordable housing and community organizing/base building campaigns work, with a goal of raising significant funding to support these newly expanded priorities.

The following represents the CSNDC's new Theory of Change for the next three years and beyond. (See next page).

# Theory of Change

## Codman Square Neighborhood Development Corporation's Theory of Change



## VI. Revised Mission and Values

### A. New Mission Statement

To reflect the new Theory of Change for CSNDC, the Board of Directors revised its mission statement to highlight its priority focus on scaling up affordable housing development and community organizing/base building, resident mobilization, and advocacy towards effective systems change in the community. While these are the priority areas, the new mission also addresses CSNDC's promotion of economic mobility services, as it will continue to offer a range of services for the next three-year period, while the organization considers transitioning many services to other nonprofits.

*Codman Square Neighborhood Development Corporation is a grassroots community organization committed to developing affordable housing and fighting for racial and economic justice by building community power, especially of low- and moderate-income communities of color in Dorchester. Through developing resident leadership, organizing in the community, promoting economic mobility services, and advocating for local environmental justice, we build collective resident power to effect systemic change and transform society.*

### B. Revised CSNDC Organizational Values

**Right to Access to Affordable Housing:** Safe, affordable neighborhoods are a foundation to individual, family, and community stability. CSNDC believes housing is a right, not a privilege and every person has a fundamental right to a decent, safe, healthy, and stable home.

**Commitment to Racial Equity and Justice, Inclusion and Diversity:** We integrate a racial equity/justice lens in all of our organizational culture and in all of our work with our diverse community. We believe in fair access to livelihood, education, and resources. We strive to reflect our values of racial justice, equity, inclusion, and diversity by engaging residents in co-powering roles in our organization, including becoming active in CSNDC's organizing campaigns and serving on CSNDC board, committees, and staff. Acknowledging, respecting, and reflecting the diversity of our community within our organization and our work enhances our ability to produce more effective outcomes. CSNDC respects the rights, dignity, and inherent value of all individuals.

**Right to Equitable Distribution of Wealth:** We support the right of all people to work, be employed, and earn a living wage. CSNDC believes in the equitable distribution of wealth and a robust and accessible strong local economy which supports traditional and alternative economic models of businesses and entrepreneurship.

**Co-Powering and Collective Action:** We recognize that our power and success go hand in hand with the power and success of collective action and resident co-empowerment in our community, acknowledging all as leaders and key stakeholders.

**Organizing and Advocacy:** We engage active residents and develop potential leaders within our portfolio of housing and surrounding neighborhoods to identify community priorities, lead collective initiatives and actions focused on systems change, successfully advocate for community needs with elected officials and policy makers, and are empowered to hold CSNDC accountable to our stated mission, strategic directions, vision, and values.

**Community Collaboration and Partnership:** Community engagement through individual residents and stakeholder groups ensures the fullest response to community needs and concerns. CSNDC recognizes the strength of our collective voice, vision, and skills, relying on a collaborative approach to successfully address our greatest and most important challenges. Partnerships are an effective means of leveraging power and resources to best address community priorities and concerns.

**Innovation and Excellence:** We strive to reflect a practice of innovation and effectiveness to help steward our work in traditional and new areas to maximize positive impact. Through promoting efficiency, developing local resources, and promoting the role of residents in an agenda for their individual and family success, CSNDC will increase community self-reliance.

**Commitment to Sustainability and Environmental Justice:** Sustainability is the recognition that everything that we need for our survival and well-being depends, either directly or indirectly, on our natural environment. Sustainability includes transit-oriented development, renewable energy, walkability, green/energy efficient design and construction practices, and resource conservation which increases affordability and reduces costs. We strive for sustainability with a focus on environmental justice for Black and Brown communities, balancing environmental, social, and economic needs of present and future generations.

## Programmatic Directions for the Next Three Years

The following describes the primary programmatic directions for CSNDC for the next three-year period.

### A. Affordable Housing Development

#### a. Three Year Primary Goal

##### Scaling Unit Production Goal:

To address increasing gentrification and resident displacement, CSNDC seeks to significantly increase the number of affordable housing units in development well above the current 40 units per year average to 75-120 units per year.

#### b. Metrics for Goal

Two hundred units of affordable housing will be in the financed, pre-development, in construction or completed stage between 2022-2025. Thereafter, at least 75-120 new affordable housing units will be in process (financed, in pre-development, in construction or completed), each year beyond 2025.

#### c. Models and Approach for Achieving Goal

##### *Model/Approach: Geographic Expansion*

CSNDC will explore expanding its affordable housing development work beyond the Codman Square service area of Dorchester into other underserved neighborhoods or localities with limited organizational capacity to develop housing. Its purpose is to assist underserved individuals and families, increase affordable housing development opportunities, and offset increasing gentrification and resident displacement. These neighborhoods may include Mattapan, Hyde Park, and other neighborhoods outside of Boston which have affordable housing needs.

##### **Strategies:**

- **Strategy 1:** Research and identify affordable development history and potential projects in key surrounding neighborhoods and localities.
- **Strategy 2:** Identify and build mutually beneficial relationships with key organizations and community leaders in the targeted communities prior to developing housing in new communities.

- **Strategy 3:** Explore potential partnerships with existing nonprofit and for-profit developers in the targeted neighborhoods.

### *Model/Approach: Joint Ventures and Partnerships*

CSNDC has a fledgling but growing successful track record of joint venture partnerships that it seeks to expand as part of the scaling affordable housing unit production goal. Since CSNDC's inception, the organization has developed approximately 186 units via joint ventures and 10,000 sq ft of commercial space. CSNDC will build on its past experiences with joint ventures and learn novel approaches to joint ventures and partnerships to achieve its scaling unit production goals.

### **Strategies:**

- **Strategy 1: Explore partnerships and/or joint ventures** with nonprofits and/or for-profit developers which may lack the community/neighborhood relationships and/or affordable housing experience that CSNDC can provide. These partnerships can include:
  - large developers who require on- and/or off-site affordable housing units within their market rate developments.
  - local churches and other faith-based organizations in Dorchester, Roxbury, Mattapan, and in distressed neighborhoods outside of Boston.
  - smaller community development organizations which have development prospects but may lack affordable housing expertise, capacity, and/or the political/advocacy exposures.
- CSNDC will use the NeighborWorks Peer learning model with other NeighborWorks CDC affiliates to increase CSNDC's knowledge about success factors and challenges in developing joint ventures.
- **Strategy 2. Aging Owners of Multi-Family Properties:** Identify vacant lots and real estate assets in targeted geographies, owned by local private or nonprofit owners with multifamily portfolios who may be ready to retire or to off-load some if not all their assets. Utilize the federally funded four percent Low Income Housing Credits (LIHTC) to acquire these assets either outright, or via joint venture with these owners. Massachusetts typically funds one project per developer per year (at best), and limits two project submissions per each funding round. Therefore, aligning or partnering with a nonprofit or for-profit developer will increase the number of developments that can be submitted in public funding rounds.
- **Strategy 3. Large Developer Community Support Partnerships:** Identify large nonprofit or for-profit developers that have development acquisitions but may lack the communities/neighborhoods relationships and support or political connections. By



partnering with other for-profit developers that have market-rate development prospects in Dorchester, Roxbury and Mattapan, these developments will need to include affordable housing units to comply with the City and State requirement.

- **Strategy 4. Faith-Based Partnerships:** Identify and research properties owned by local churches, some of which include single story commercial properties that these churches operate from, and which have the potential to be developed as mixed-use housing comprised of commercial space on the ground floor and housing above. Contact and set up meetings to assess potential partnerships with local churches in Dorchester, Roxbury, Mattapan, and other faith-based organizations in Boston neighborhoods that may have land or real estate assets but lack affordable housing experiences and capacity.
- **Strategy 5. Nonprofit Capacity Building Partnerships:** Identify smaller/fledgling CDCs or other such groups that seek to do affordable housing such as Southwest Boston CDC, VietAID, or the Mattapan Neighborhood Council, which may have development prospects but may lack affordable housing experience, staff capacity, and/or political connections.

#### *Model/Approach: Acquisition of Properties Owned by Aging Owners/Expiring Use*

CSNDC will identify expiring use properties (privately owned but publicly subsidized housing developments that can be converted to market rents when the mortgage is paid off or the subsidy contract expires) and owners of significant portfolios of multifamily housing in its service area. CSNDC will work with these owners, some of whom may be ‘aging out’ and ready to dispose of their assets, to acquire these properties either directly, or via joint ventures with tenant groups.

#### **Strategies:**

- **Strategy 1:** Identify and potentially develop expiring use properties owned by people looking to retire or sell for market-rate value and not interested in another long-term Section Eight contract with the U.S. Department of Housing and Urban Development (HUD).
- **Strategy 2:** Identify and potentially develop properties owned by “aging out” residents for a possible acquisition.
- **Strategy 3:** Consider using the federally funded four percent Low Income Housing Credit (LIHTC) to acquire and rehab these existing properties to preserve affordability.

#### *Model/Approach: Capital Innovation*

CSNDC will explore traditional and non-traditional capital access models which will include:

- a. tapping the equity within CSNDC’s wholly owned, existing portfolio for capital to stabilize the properties financially and physically, while also establishing an internal

capital pool to pursue other real estate acquisitions, preservations, and new developments;

- b. developing a major donor real estate capital cultivation campaign;
- c. exploring a partnership with the [Boston Ujima Project](#), led by Black-led Community Development Corporations in the Boston area – a possible capital access/fundraising model for affordable housing development; and,
- d. using the four percent Federal Low Income Housing Tax Credit Program (LIHTC) (a source of Federal and State funds for use for existing units which can be used to lower investors tax credits) to acquire and package affordable housing developments.

### **Existing Portfolio Capital/Equity Tapping**

#### **Strategies:**

- **Strategy 1:** Assess the potential to tap equity from CSNDC’s wholly owned existing portfolio which currently includes Erie Ellington Homes, Talbot Bernard Homes, Washington Columbia I and Washington Columbia II, by restructuring/re-syndication and to draw out cash from properties to establish an internal capital pool which would be used to pursue new acquisitions, preservations, and developments. All of the existing properties mentioned are scheduled to be refinanced/restructured within the next two to three years, with an equity take out potential that exceeds \$10 million, to capitalize CSNDC’s new internal Expansion Development Fund.
- **Strategy 2:** Review the other properties in the portfolio to assess investor exits, restructuring/re-syndication and equity take out potential.

### **Major Donor Real Estate Capital Cultivation**

#### **Strategies:**

- **Strategy 1:** CSNDC will explore developing a major donor real estate capital cultivation campaign for raising affordable housing capital, focused on to social/racial justice investors, including increasing the donations to such a capital pool by converting/supplementing investments of current Massachusetts Community Investment Tax Credit major donors.

### **Four percent Low Income Housing Tool Credits (LIHTC)**

#### **Strategies:**

- **Strategy 1:** Learn about success strategies from other nonprofits who have been successful in raising exceptionally large donations (in multi-million-dollar ranges) within the last two years.

- **Strategy 2:** Investigate the potential of CSNDC’s larger CITC donors shifting their funding priorities to support affordable housing.

**Potential partnership with Boston Ujima Project**

**Strategies:**

- **Strategy 1:** Explore emerging models with other Black-led CDCs in the Boston area (Madison Park, JPND, Urban Edge) for new streams of funding for affordable housing development. Model includes significant community input into the model of affordable housing development and intentionally connects racial justice/equity issues.

**A. Community Organizing and Base Building**

**a. Three Year Primary Goals:**

As a key component of CSNDC’s North Star priorities, CSNDC will significantly expand its base of active and engaged residents to effectively influence, develop, and advocate for systems change and policies focused on social and racial justice, and the socio-economic rights and well-being of the Codman Square/South Dorchester community, particularly for BIPOC (Black and Indigenous People of Color). Through the strategies of organizing/base building and advocacy, CSNDC will build and mobilize community power to change policy, legislation, and systems change with the goals of: (a) increasing housing affordability and access, anti-displacement and housing retention, rent stabilization, (b) improving racial justice/equity outcomes especially related to community development policy and resource allocation, (c) improving economic justice outcomes, and (d) increasing climate and environmental justice programs in the Codman Square and South Dorchester communities.

To reflect this new direction and its emphasis on community organizing and base building, the *Community Organizing and Resident Resources* department will adopt a new name: *Community Organizing and Resident Engagement* department.

**b. Goal Metrics:**

- By 2024, a base of at least 100 trained residents will be actively engaged in at least two CSNDC organizing campaigns focused on one of the following: a) affordable housing rights/rent stabilization, and anti-displacement, b) racial and economic justice, and d) climate/environmental justice.
- At least one of those campaigns will have successful “wins” resulting in either: (a) increased resource allocation for the issue of concern or (b) change in programmatic,

policy or legislative approach to an issue, on a community (Dorchester), Boston, and/or state-wide level.

### **c. Models and Approaches for Achieving Goals**

#### ***Scaling up Organizing/Base Building with Integrated Strategy—Resident Organizing Training and Resident Leadership of CSNDC’s Organizing Campaign; Transferring ‘Services’ to other Departments***

CSNDC will have an integrated “scaled up” community organizing strategy which includes building a large base of trained, resident leaders and organizers—an “*Equity Army*,” whose members will be trained using political education and skill building models (e.g., popular education models) in community organizing -- the design and implementation of organizing campaigns and advocacy. The base of organizers and resident leaders will lead multiple CSNDC community organizing campaigns focused on increasing public awareness, mobilizing the community with direct action, developing policy, using advocacy strategies, and developing new and emerging community organizers to continue to implement systems change.

To achieve the increased scale in organizing and base building, all CSNDC’s clients will be provided political education about the connection between solving their individual issues and system change, and how to achieve system change via engagement in, and through collective action. CSNDC staff will connect clients with CSNDC’s current, community organizing campaigns and policy initiatives. Additionally, in order for the department to scale up organizing and base building, current resident services, including those focused on health and wellness previously provided by this department, will transfer out of the Community Organizing departments into other departments.

#### ***Community Organizing/Resident Leadership Institute***

- Formal leadership development/community organizing training will serve as a cornerstone to advancing CSNDC’s organizing priorities and will significantly expand its formal leadership development/community training to a more formal 35-hour program. This will significantly increase the skill base of resident leaders and prepare them to develop and lead CSNDC’s organizing campaigns. As a further incentive, CSNDC will partnership with Cambridge College, so that graduates of the Institute will receive college credit.
- The Resident Leadership/Community Organizing Institute will be closely aligned with CSNDC’s organizing campaigns and participants will be actively encouraged to participate in and lead CSNDC’s organizing campaigns.

### ***Anti-Racism/Equity Army Academy***

- CSNDC will develop its innovative Anti-Racism/Equity Academy and actively integrate and align this Academy with its Resident Leadership/Community Organizing Institute. Both the Resident Leadership Institute training and Equity Army Academy will use the Popular Education model<sup>3</sup>, developed by Pablo Freire, (which centers participants' life experiences, and recognizes that everyone is both a teacher and a learner) and more traditional training approaches. This is an effort to build a significant base of engaged, grassroots resident constituents (an Equity Army) through political education about the root causes of current conditions in our community, based on the facts and history of racism and income inequity. The students will learn skills to navigate and engage in change on these issues, to change hearts, minds, and policy.
- CSNDC's goal is to dismantle racism and promote racial equity and economic justice, , and create lasting and positive change for the community. The Anti-Racism/Equity Army Academy graduates will be activists in CSNDC's organizing campaigns for systems change in the community and beyond, dismantling racist and oppressive systems, policies, and programs. Non-residents also may participate, although the priority will be Dorchester residents. Cambridge College will provide college credits for matriculating from the Anti-Racism/Equity Army Academy.

### ***Popular Education Model for Academy and Institute***

Both entities will use a popular education model, an active learning process in which participants share their experience and knowledge, learning from each other, and leading to mobilizing together as a group in collective action. This model was developed by Paulo Freire in Brazil, where it focuses on marginalized populations who co-learning and have gone on to effect positive social change.

### ***Community Organizing Model***

The Department will use a model of organizing which has proved to be successful in many community organizing campaigns. The model will include several different organizing campaigns occurring simultaneously. The model emphasizes that residents, after trained in organizing, serve as the leaders of the campaigns, with staff serving in support roles. The components include the following:

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<sup>3</sup> Freire, P. (1970). *Pedagogy of the Oppressed*. New York, Continuum.

1. Engaging resident leaders who have been through the leadership development training/racial equity academy in leading the campaign organizing design and strategy, with staff supporting leaders.
2. Defining an issue/problem to address through collective action.
3. Determining who has the power to make decisions regarding the issue.
4. Conducting a power analysis and determining potential targets (individuals, groups, or structures that have the power) conducting learning from residents about the issue, etc.
5. Researching potential targets and allies (key stakeholders for relationship building,) and other related information necessary for a successful organizing campaign.
6. Defining the organizing campaign desired outcomes, goals, strategies (direct actions, community education, agitation, and other advocacy); identifying resources, etc.
7. Mobilizing the base for collective action, including one to one relationship building meetings for recruiting new residents for the campaigns.
8. Intentionally engaging graduates of CSNDC's Resident Leadership Institute and Racial Equity Academy with CSNDC's organizing campaigns.
9. Reflecting and Assessing (e.g., periodic reviews to assess what is working, timeline, goals achieved, and any ongoing changes that may impact strategy actions/targets, etc.).

All organizing goals will be separated into internal or external goals. Internal goals will focus on numbers of leaders trained in leadership and community organizing, specific base-building metrics, staff development needs, grant/funding obligations, data collection/analysis/reporting, and work plan timelines. External goals will focus on systems change in the community (e.g., passing of legislation, community appointments to decision making positions, community resources procured, funding allocated, etc.).

### ***All Staff as Community Organizers***

As part of North Star Priorities, all staff will be trained in community organizing with a racial equity lens and shall actively encourage residents using CSNDC's services, to participate in leadership training and/or the Anti-Racism Academy, other external training followed by joining with CSNDC's community organizing and advocacy campaigns. Additionally, all staff will participate in anti-racism training.

A peer-to-peer education/learning model will be encouraged which integrates the learning from the anti-racism and community organizing training, with staff sharing experiences and skills learned with others. CSNDC may (a) facilitate additional peer-to-peer internal learning by hosting brown bag discussion lunches, (b) organize mentoring with more experienced organizers, and (c) provide real time, "on the job training" methodologies, etc.

## Strategies:

- **Strategy 1:** Expand and scale up the of Resident Leadership/Community Organizing Institute as part of expanding base-building and directly connect to CSNDC’s organizing campaigns.
  1. Increase formal resident leadership/community organizing training through the Resident Leadership Institute. This expansion will include Institute sessions, specifically geared toward the young adult community demographic, an opportunity for engagement with a population currently underrepresented in CSNDC’s organizing work.
  2. Expand the curriculum and hours needed to complete the Institute’s sessions to 35 hours. The expansion will include but not be limited to, a deeper exploration of the various models of community organizing and actual ‘practicums,’ meaning, opportunities to work and address, on an actual resident-identified implementation project of community concern. By expanding the hours, residents also might qualify for college credit from Cambridge College for completing the Resident Leadership Institute course. It will focus on three main approaches:
    - **Social Action:** “Social action approaches assume the existence of an aggrieved or disadvantaged segment of the population that needs to be organized to make demands on the larger community for increased resources or equal treatment (Rothman, 1995).”
    - **Locality Development/Community Organizing:**” Locality or community development is a neighborhood-based strategy used to engage a broad range of key stakeholders in developing goals and taking civic action (Rothman, 2001)”
    - **Community Building:** “Community building focuses on strengthening the social and economic fabric of communities by connecting them to outside resources (Smock, 2004). The goal is to build the internal capacity of communities by focusing on their assets/strengths and engaging a broad range of community stakeholders to develop high-quality and technically sound comprehensive plans (Smock, 2004).”
  3. Connect the Resident Leadership Institute program more closely to the organizing campaigns, and actively encourage graduates to engage in CSNDC’s current organizing campaigns.
  4. Develop a robust outreach plan which engages a larger proportion of community residents for base building and engaging in all components, including the Resident Leadership Institute and CDNDC’s organizing campaigns.

*\*Definitions from Mary Ohmer and Karen DeMasi's "Consensus Organizing: A Community Development Workbook. A Comprehensive Guide to Designing, Implementing, and Evaluating Community Change Initiatives"*

- **Strategy 2:** Develop CSNDC's Anti-Racism/Equity Army Academy (AREA) to inform, educate, and empower residents.
  1. In partnership with appropriate partner organizations/entities (Cambridge College and others), create a hybrid model for community/political education for residents which encompasses aspects of popular education and traditional student/teacher instruction. The Academy will focus on interpersonal, institutional, and structural racism, with an emphasis on institutional and structural racism.
  2. In addition to educating residents, develop a workshop model curriculum specifically focused to engage and educate CSNDC staff on issues of anti-racism. The purpose of this training is to impact individual department decision-making and overall organization priorities, organizational operating assumptions, strategic partnerships, and inform future investment of time and capital. These workshops will be integrated into Senior Management and all staff meetings.
  3. Develop a time bound plan and specific protocols to integrate the principles and practices taught at the Anti-Racism Academy into all organizing campaigns and high impact organizational decision-making practices at CSNDC
  4. Develop a robust outreach plan which engages community residents in the Academy.
  5. Integrate/align the Anti-Racism Academy with the Resident Leadership Institute/Community Organizing training, so that community residents are able to access each component.
- **Strategy 3:** With key residents in the leadership, design and implement CSNDC organizing campaigns focused on the key issues listed above and build a base of 100 resident leader organizers to mobilize the community in collective action by the end of 2024.
  1. Identify at least 100 residents who are poised for community organizing leadership. This will be accomplished using a variety of strategies:
    - Conduct one on one meetings with and provide mentorship for participants and graduates of the Community Organizing/Resident Leadership and Anti-Racism Academy to actively encourage them to join CSNDC's organizing campaigns.



- Conduct outreach to community residents interested in collective action to engage them in CSNDC’s campaigns. encourage them to engage with Community Organizing/Leadership Training Institute.
  - The CSNDC’s Economic Development and Case Management staff will refer CSNDC building-based resident association members to the Community Organizing and Base Building department for engagement in organizing.
- 2. With resident leaders, determine issues related to the system change issues listed above which residents are interested in addressing through collective action.
- 3. Conduct a power analysis and determine potential targets: conduct relevant research on targets and issues.
- 4. Define organizing campaigns with desired outcomes, measurable goals, strategies, etc.
- 5. Mobilize the base and engage in collective action - recruit additional residents.
- 6. Conduct regular assessment of campaign and make changes where indicated.
- **Strategy 4:** Design and implement a community organizer training series focused for all CSNDC staff, so that all staff are trained in community organizing strategies and anti-racism and will view themselves as community organizers.
  1. All staff will participate in tailored training in community organizing strategies and anti-racism, and how to engage residents seeking services in training and the resident led, CSNDC-sponsored, community organizing campaigns.
  2. All staff who have sustained contact with residents will work to engage residents in community organizing and anti-racism training to assist in their viewing themselves as community organizers.
- **Strategy 5:** Develop a transition plan for existing resident services
  1. Collaborate with the Economic Development Department which in the new organizational structure will support CSNDC’s case management function and will develop a resident referral model which transitions resident social service support to the economic development and case management staff. Depending on the specific individuals’ service needs, some referrals will be managed internally while others may be transitioned to external entities.

2. Assess staff capacity, develop a timeline for transition, and establish a communication and referral plan with staff and residents to inform and guide the shift.
  3. Design and use an intra-departmental strategy which introduces community residents currently receiving social services from the Community Organizing and Engagement department, helping them see the connection between their service needs and broader policy and program issues. In that way, CSNDC are engaging residents in identifying campaign priorities and facilitating their engagement in existing campaigns, and leadership development/education opportunities. Creation of formal protocols should be in place to ensure continued engagement with potential the emerging, growing new base of active residents.
  4. Complete the process of transitioning CSNDC's food justice/urban agriculture program to the Eco-Innovation District and transitioning CSNDC's technology education and workforce development work to the Economic Development Department.
- **Strategy 6:** Create a data collection model to measure success levels for base-building and development of campaigns.
    1. Develop a process of establishing and tracking organizing campaign benchmarks beyond what currently exists.
    2. Increase focus on data compliance within the staff performance evaluation process. Data compliance will be weighted higher in performance evaluations.
    3. Develop a formal training tool which all department staff must complete.
    4. Implement a community agreement/group contract regarding outreach protocols, data tracking, campaign creation and management, and leadership development.
    5. Provide all organizing staff with appropriate professional development and training.
    6. Establishment of formal quarterly review of all organizing campaigns, resident engagement, numbers of active residents as part of engaged base, and resident leadership development.

## A. Eco-Innovation District

### a. Three Year Goals

Launched in 2013, the Talbot Norfolk Triangle Eco-Innovation District is the first neighborhood in Boston striving for both Leadership in Energy and Environmental Design (LEED-ND) as well as Eco-District designation. The District is a 13-block span of 525 homes with about 1,500 residents and a range of businesses, including 'back street'/light industrial businesses. It serves as the locus of resources, and strategies, for energy and environmentally based stewardship,

climate justice, that help residents save money on energy bills, create a healthier environment, and remain in place in the face of Boston’s ongoing displacement crisis.

In the next three years, in alignment with CSNDC’s North Star priorities, the Eco-Innovation District Department will transform to using a community organizing/base building model. It will scale up its climate justice/environmental work and connect more closely with the Community Organizing and Resident Engagement Department to identify and train constituents on campaign and strategy development related to policy and systems change, with a specific focus on energy and environmental issues. Eco-Innovation District department clients will be encouraged to participate in the Resident Leadership Academy and/or the Anti-Racism/Equity Army Academy, as a first step towards engagement in collective action.

At the same time, the Department will continue to provide a unique set of services through a “Hub and Spoke Model” and will align the service provision goals closely with the resident leadership development and community organizing campaigns and goals.

CSNDC’s Oasis at Ballou Farm will continue to prioritize recruitment and training of men of color to cultivate, harvest and sell produce at Ballou. Additional training modules will be added that focus on the connection of the work at the site, to public and private resource allocation, planning and policy issues. In that way, the men of color constituents will begin to see connections between their labor and social justice issues and will be encouraged to participate in advocacy campaigns designed to affect meaningful change, through CSNDC’s organizing campaigns and/or the Fairmount Indigo CDC Collaborative’s Climate Justice Initiative. This same approach will be used with BIPOC students enrolling in CSNDC’s Green Infrastructure Training and Certification program.

Both the Oasis at Ballou Farm and the Green Infrastructure Training and Certification Program will be scaled up to serve significantly more residents. Over the next three years, the current services provided by this Department (Clean Energy Ambassador Program, Energy Retrofit and Solar Installation will transition to a “Hub and Spoke Model” (see below for description).

## **b. Goal Metrics**

### **Organizing/Base Building and Advocacy Metrics:**

By 2024:

- A base of at least 50 trained constituents will be actively engaged in the Fairmount Indigo CDC Collaborative’s Climate Justice Initiative’s campaigns focused on climate and environmental justice.
- At least two of the three Collaborative’s climate-related legislative priorities targeted will have been fully enacted into law or policy, resulting in either: (a) increased resource allocation to Fairmount neighborhoods to advance climate and/or housing priorities

with clear baseline measurables established related to increased resources), or (b) change in programmatic, policy or legislative approach to these same issues.

- At least one additional climate/environment-related legislative or policy campaign will be underway, with full constituent engagement and activism, with at least 15 constituents actively engaged in the campaign.

### **Service Provision Metrics:**

By 2024:

- The Ballou Urban Agriculture site will train at least 20 men of color.
- At least 25 percent of Ballou operating costs will have been recovered via increased harvest and sales.
- At least 100 trainees per year will graduate from the Green Infrastructure Training and Certification program, with at least 50 trainees, upon course completion, passing the National Green Infrastructure Training and Certification exam each year.
- At least 30 percent of Certificate program graduates will be placed into jobs in the green industry.

### **c. Models and Approach for Achieving Goal**

#### ***Community Organizing/Base Building Model for Climate/Environmental Justice***

The Department will use a more, systematic, intentional community organizing model, identifying residents/stakeholders who are interested in or concerned about environmental/climate justice issues and supporting them in co-empowerment and with popular education, resulting in their engaging in collective action, organizing campaigns.

The organizing campaigns will continue to focus on the three key legislative priorities that the Fairmount CDC Collaborative's Kresge Foundation-funded Climate Justice Initiative identified. The Initiative aims to develop leaders and strengthen a grassroots base, amplifying community voices to shape local and statewide policies that address climate change, resilience, health, and equity and intervene in historical patterns of neglect and disenfranchisement.

The three current legislative priorities are:

- a) State Housing and Environment Revenue Opportunities (HERO) legislation which would double the deed excise tax (a progressive tax), resulting in \$600 million a year in revenue that will be divided between affordable housing and climate resilience projects.
- b) PowerCorps BOS (formerly Boston Conservation Corp), which would provide paid training to young adults in green-infrastructure related jobs and place them in jobs.
- c) State Climate Roadmap Bill, enacted in 2021 which is sweeping environment/climate legislation that sets greenhouse gas emission targets, incentivizes electric vehicle use, and

provides at least \$12 million through the Mass Clean Energy Center for green job training. The Collaborative is targeting the \$12 million for equitable resource allocation to programs run by nonprofits, such as CSNDC's Green Infrastructure Training and Certification program.

### Strategies:

- **Strategy 1:** Continue to 'meet residents where they are' and support residents' efforts to plan and garner resources for such local environmental 'pet' projects, with a goal of helping residents see how their projects can be advanced by engaging in the larger Fairmount CDC Collaborative's legislative advocacy campaigns. Support of resident personal projects builds resident interest, understanding, and engagement in environment-based organizing and advocacy campaigns.
- **Strategy 2:** Add new climate/environmental legislative/policy priorities and/or focus on equitable resource allocation and policy implementation of the established legislation in the Collaborative's neighborhoods. Successfully passed legislation will help CSNDC's BIPOC constituents understand and experience the positive socio-economic impacts as a result of their advocacy work.

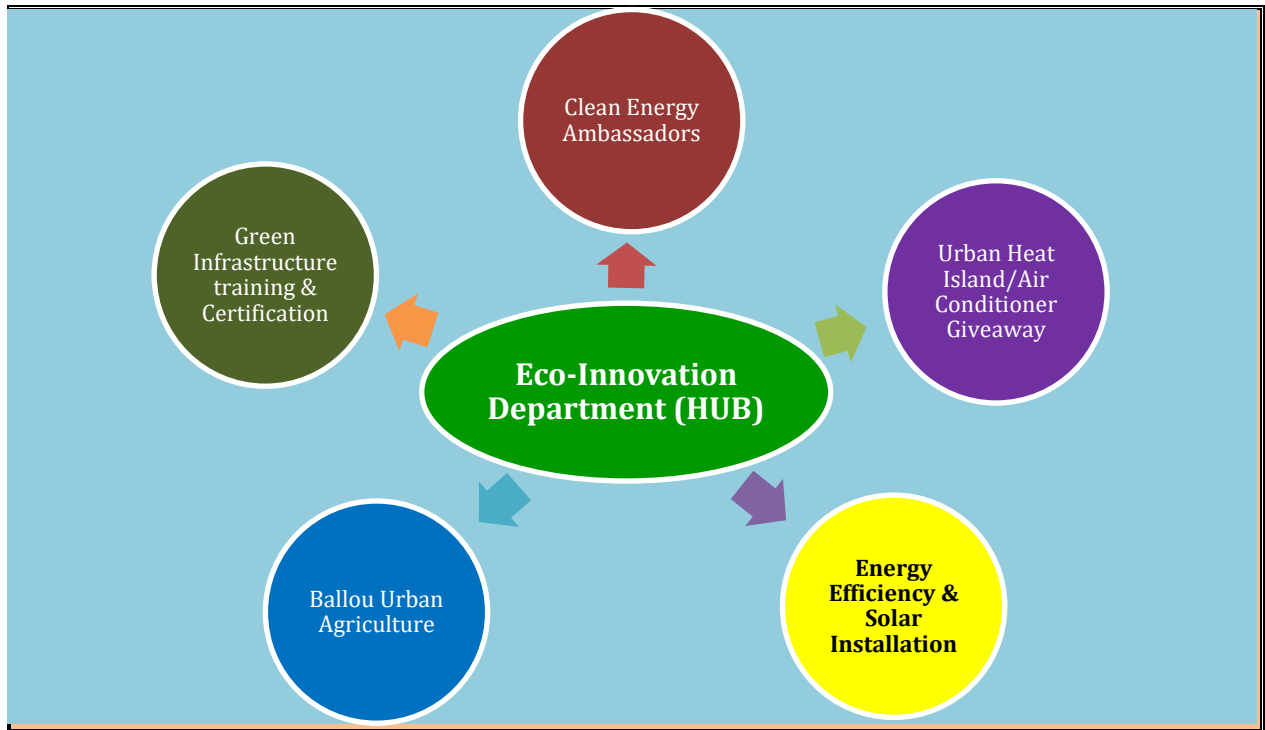
### *Transitioning Direct Services to a Hub and Spoke Model*

To move to a community organizing model for the Eco-Innovation District (EID) work, some of the current direct service EID programming may, via a 'Hub and Spoke' approach, transition to partnerships and other arrangements. Over the next three years, CSNDC will explore partnerships with potential partners, while continuing to evaluate the viability of the transition.

CSNDC will transform the following services using a "hub and spoke model" in which CSNDC is at the center and other service or civic entities radiate, as 'spokes,' out of the 'hub.' As the inner circle, or 'hub,' CSNDC will serve as a central support for fundraising, and program modeling to support the service program in question. Additionally, CSNDC will serve as the hub or manager of funder relationships and centralized reporting related to the direct service programs while CSNDC contracts out the actual service delivery work to partnering organizations.

Within the hub and spoke model, CSNDC will initially raise the funding for the service work, provide the service template/operating methodology, and train the 'spokes' to do the actual direct service delivery to constituents. 'Spoke' partners may be neighborhood/civic associations that have capacity to provide a modest amount of direct service work, and small to midsize community-based nonprofits.

## Hub and Spoke Model



The following describe the strategic directions for the training and service provision programs within this “Hub and Spoke” model.

### A. National Green Infrastructure Training and Certification (GITC)

#### Strategies:

- **Strategy 1:** Add at least two more CSNDC staff as course instructors who have been trained by the National Green Infrastructure Training and Certification Train the Trainers program.
- **Strategy 2:** Partner with the City of Boston’s administration to implement the City’s Green New Deal Plan; target additional funding and green employer linkages via this partnership.
- **Strategy 3:** Create a recruitment plan to increase the number of locally based BIPOC constituents participating and graduating from the program.

- **Strategy 4:** Identify and support educational remediation needs of program participants to improve the success rate completing the GITC course and passing the NGICP national certification exam.
- **Strategy 5:** Hire a Green Jobs Developer, or partner with the City of Boston, to add capacity to identifying green employers for job placement purposes.
- **Strategy 6:** Work with technical assistance consultants to create and implement a marketing and business expansion plan for the GITC program. Explore new fees for service markets (e.g., as architectural, construction and engineering firms, etc).
- **Strategy 7:** Continue to advocate for policy change at the City and State level, which would prioritize GITC graduates for publicly funded green jobs, while requiring State/City contractors to be green infrastructure certified to win public bids and provide extra credit to such contractors bidding on public jobs if they are credibly recruiting locally trained BIPOC residents.

## B. Ballou Urban Agriculture

Over the next years, shift Ballou’s model to incorporate a more intentional focus on integrating **community** organizing and base building. This may include using the Ballou as a site for organizing workshops and training, recruiting new residents and partners for engaging in organizing campaigns, particularly climate justice campaigns. After the two-year period, CSNDC will have assessed the viability and alignment of Ballou to its revised mission and will have decided whether to continue to directly manage Ballou, or to transition management of the site to another organization (by 2024).

- **Strategy 1:** Scale up use of OASIS at Ballou as a location for community service and engagement.
- **Strategy 2:** Engage in two to three partnerships with community-based organizations which have social, equity, and food related missions aligned with Ballou’s mission. Organizations will utilize the site three to five times/year at their expense, helping bring in new constituents, and allowing CSNDC to engage them in existing and ongoing opportunities such as advocacy, supporting the Men of Color program, engage in base building and other opportunities.
- **Strategy 3:** Explore possibility of these partners eventually and more formally recruiting allies for base building and advocacy.
- **Strategy 4:** Recruit all volunteers and men of color who have participated in Ballou for CSNDC’s organizing campaigns and advocacy initiatives.

- **Strategy 5:** Engage the Board EID committee to support these strategies.
- **Strategy 6:** Assess Ballou’s funding potential over the next two years to determine its ongoing viability as a stand-alone urban agricultural site, and whether to transfer the program to another nonprofit or partner.

### C. Residential and Commercial Energy Efficiency and Solar Installation Program

For the last eight years, CSNDC’s focus in these areas has been to reach out to and educate residents and businesses about the benefits of energy efficiency measure (e.g., low/no cost home energy assessment, retrofits, weatherization, installing solar panels), and support them in accessing suppliers and installers of these such energy efficiency services.

### D. Urban Heat Island/Air Conditioner Giveaway

The focus of this program is to combat the urban heat island effect in BIPOC communities, which makes inner city, dense urban neighborhoods such as Dorchester hotter than other locations in Boston and surrounding areas. This impacts air quality, which exacerbates health issues such as asthma, heart disease and mental health.

### E. Clean Energy Ambassador Program

A newly funded program in 2022, the Clean Energy Ambassador Program calls for converting CSNDC’s current small home rehab loan program into a new model focused on stabilizing existing low and moderate income BIPOC homeowners who are unable to obtain loans from a bank, against gentrification, displacement, and foreclosure, while furthering environmental and energy justice. These funds allow homeowners to preserve and improve their most valuable asset and prevent displacement. The new Civic Engagement Home Rehab Recoverable Grant Program will save people money on home repair, as well as on energy cost and consumption, and should lead to improved air quality within the community, as well. As Clean Energy Ambassadors, residents will engage in clean energy related training and learning opportunities and share this information with their neighbors

**The following are strategies for all Eco-Innovation District programs:**

#### Strategies:

- **Strategy 1:** Train and shift staff from direct service to a ‘hub and spoke’ partnership model.
- **Strategy 2:** Build relationships with potential partners and understand the landscape of workforce development, sustainability and energy efficiency, equity, and



engagement/advocacy opportunities available to CSNDC area residents and community based organizations.

- **Strategy 3:** Continue to develop systems for handoffs/transition of direct service work to relevant partner providers, tracking referrals, follow up, referral outcomes, and funder reporting protocols for both residential and commercial.
- **Strategy 4:** Work with partners, to engage clients in how the individual issues impacting them are systemic and that policy change at the city and state level, along with improved political access and representation, will improve their and community socioeconomic conditions, and improve overall health, quality of life and financial stability.
- **Strategy 5:** Plan fundraising strategies with partner organizations to raise funds for the program with CSNDC support, providing CSNDC a small amount of funding, and with partners managing most of the work. Eventually transition all work and fundraising to partners with CSNDC no longer engaged.
- **Strategy 6:** Starting in 2022 and no later than 2024, the Hub and Spoke model approach will be finalized. In the interim, CSNDC will, using the hub and spoke model, apply for additional grants, and partner with others such as neighborhood associations to run all aspects of the Urban Heat Island/Air Conditioner Giveaway program, the energy assessment and retrofit program, the Clean Energy Ambassador Program, as well as the Ballou Urban Agriculture program.

## B. Economic Development

### a. Three Year Goals

The Economic Development staff will evolve into a ‘one stop shop’ model for all CSNDC constituents’ (residents and businesses) using a Financial Opportunity Center model to address their economic mobility needs. As part of this transition, CSNDC’s case management function will be absorbed into and supported by this department. The department will emerge as a ‘connector,’ helping residents not only connect to the services they need, but also help residents understand the root causes of their problem or situation. With this understanding, residents will be encouraged to join together with other residents in collective action to address those root causes and mobilize for systems change. They will be actively encouraged to participate in the Leadership Development Institute/Anti-Racism Academy and then with CSNDC’s organizing campaigns.

The staff also will identify one or more services to transition to a partnering organization. These pilot transitions will be evaluated based upon the impact upon constituents, residents, funding and CSNDC's reputation within the community. Based upon a successful evaluation, additional services will be transitioned, so that CSNDC can increase its focus on scaling affordable housing and expanding its community organizing and advocacy work.

## **b. Goal Metrics**

### **By end of 2022:**

- All Economic Development staff participate in trainings in community organizing/base building, integrated job readiness and financial coaching.
- Launch first rehab project under Civic Impact for Home Improvement recoverable grant model.
- Finalize plan for the transformation to an integrated Financial Opportunity Center model.
- Test a transition of specific components of the Economic development program to determine impact on CSNDC's constituents.

### **By end of 2023**

- Complete the transition to an integrated Financial Opportunity Center model
- Launch revamped Estate Planning program.
- Use findings of analysis to make recommendations on maintaining services internally or transitioning services to a partner service provider.

### **By end 2024**

- Improve over 400 community members economic and financial wellbeing through integrated coaching, education, and case management that support career readiness, financial skills and knowledge, and housing stability.
- Increase housing stability and protect assets for 40 homeowners through financially supporting home rehab projects and estate plan execution for low/moderate income homeowners to help curb displacement, preserve community cohesion, and maintain intergenerational wealth.
- Engage at least ten business owners and community stakeholders with the City of Boston to formalize Codman Square Main Street as a sustainable, standalone organization, with CSNDC designated staff on the Board of Directors.
- Advocate for and empower over 200 community members through: 1) developing network of 15 or more formalized referral partnerships addressing basic needs, and 2) by drawing connection between services provided and systemic issues and encouraging them to participate in Resident Leadership Institute, Anti-Racism Academy, and CSNDC's community organizing and advocacy campaigns.

## **c. Model/Approaches**

### ***Financial Opportunity Center Model:***

The underlying principle of the Financial Opportunity Center model is providing these services in an integrated and co-located way, rather than as stand-alone services offered in multiple locations. Services also are provided with a long-term commitment to helping clients reach their goals. To facilitate an integrated service model, all current economic development services will be conceptualized, transitioned to, and delivered via a Financial Opportunity Center model.

In alignment with the Local Initiatives Support Corporation's (LISC) Financial Opportunity Center model, CSNDC will incorporate evidence-based practices to integrate coaching and education and all CSNDC's Economic Development services into a co-located physical space, with all staff being trained and able to facilitate service delivery across the spectrum of services. The services include employment support, digital skills, housing counseling, financial capabilities, home rehab, and small business development, credit building and protection. Additionally, case management will be provided to facilitate connections to basic need supports such as emergency rental assistance, utility assistance, nutrition assistance, and childcare. The Financial Opportunity Center based services will be co-located at the existing CSNDC Computer Learning Center.

As the Financial Opportunity Center is implemented, CSNDC will begin in-depth conversations with potential partner organizations and funders to assess the feasibility of transferring these services to them.

### ***Financial Opportunity Center Components:***

#### ***Main Street Model for Small Business Development***

Through CSNDC's partnership with the Boston College Corcoran Center, CSNDC has convened a committed group of community stakeholders to form a *Codman Square Business District Advisory Council*, with the intent of re-launching a *Codman Square Main Streets* program to support the business district's vitality and a hub of economic activity and community engagement. For this effort, CSNDC will engage, organize, and empower community stakeholders and small business owners/representatives to be leaders of and advocates for increasing vitality of the business district. This will support small businesses, nurture new entrepreneurs, and attract local residents and people from across Boston to make Codman Square a destination.

Through its partnership with the Corcoran Center, CSNDC, by mid-2023, CSNDC will have supported three initial convenings of the Advisory Council. The Advisory Council will become a separate organization with CSNDC serving as a key stakeholder member. The Council will advocate for racial equity in public investment in BIPOC-owned. The Advisory Council will

either evolve to become a Main Street organization, or another model which serves a similar role in advocating for equitable public investment.

By mid-2023, CSNDC will have had partnership conversations with Dorchester Bay Economic Development Corporation, Jamaica Plan Neighborhood Development Corporation, Commonwealth Kitchen, and other organizations to assess collaborations and/or referrals to support existing businesses and entrepreneurs, within the new Advisory Council model.

### *Estate Planning and Home Improvement Programs*

Estate planning and home improvement loan programs will be re-organized under the umbrella of Community Cohesion programs. Estate planning and home improvement loans will remain a part of CSNDC's direct services to stabilize the community by maintaining homeownership assets and facilitating intergenerational transfer of wealth. This will be complimented by CSNDC's efforts to organize community members in advocacy campaigns targeted to prevent displacement and increased affordable housing production.

In the absence of identifying new pro bono resources, CSNDC will shift estate planning to a "low bono" model, recruiting, and contract with an attorney(s) at a low-cost, reduced rate, who will provide estate planning services to CSNDC clients at reduced rates or no cost. The program model will remain similar to the current model, including informational workshops to educate community members on basic estate planning concepts, one-on-one development, and execution of estate plans with a qualified attorney, and linkages to other financial supports, through the FOC model.

The emerging Civic Engagement Home Rehab Forgivable Grant Program will be a force multiplier initiative: improving and preserving home assets, while stimulating civic engagement, and increasing clean energy uptake by low/mod income people, thereby saving them money, while improving the environment.

### **Strategies:**

- **Strategy 1:** Shift staff from direct service to a co-empowerment model. All department staff will operate as organizers, engaging clients in how the issues impacting them are grounded in a need to change policy and improve socioeconomic conditions through collective action and connecting them to the racial equity academy and organizing campaigns.
- Provide all Economic Empowerment Department staff with community organizing and racial equity training.
- Engage AmeriCorps VISTA staff to 1) fully assess landscape of financial empowerment, housing resources, workforce, and economic development programs available to CSNDC's constituents, 2) develop effective systems for client service

referrals/warm handoffs including tracking referrals from handoff through follow up, and eventual outcomes, and 3) conceptualize and implement a to track internal referrals from the Economic Empowerment team to the Community Organizing and Advocacy Team and clients' activation in resident leadership development and engagement in organizing campaigns.

- **Strategy 2:** Organize and empower small business owners as leaders of and advocates for improvement to the business district. Build capacity for the Codman Square Business District Advisory Council (the Advisory Council) to function as a sustainable, standalone organization.
  - Advocate for the City of Boston to support Codman Square as a Main Street district, financially and programmatically, in partnership with collaborating organizations.
  - Connect with Massachusetts Growth Capital Corporation to facilitate transition of contract for continued provision of small business technical assistance to constituents.
  - Identify and support acquisition of private resources to sustainably fund Codman Square Main Street.
  - Facilitate effective partnerships within the small business technical assistance and entrepreneurship ecosystem (Dorchester Bay Economic Development Corporation, Jamaica Plane Neighborhood Development Corporation, Coalition for a New Economy, and Commonwealth Kitchen).
- **Strategy 3:** Refine and scale asset development and protection programs for community cohesion/anti-displacement: revitalized estate planning program and Civic Impact for Home Improvement Loan Forgiveness model.
  - **Estate Planning program:** Develop budget, identify funding to support, develop and implement a “low bono” model, engage an attorney (or attorneys) at a low-cost, or reduced rate, to provide low-fee estate planning services.
  - **Civic Impact for Home Improvement Loan Forgiveness:** Develop budget, identify funding to support, and develop plan to implement Civic Impact for Home Improvement Loan Forgiveness program.
  - As described above for all programs, incorporate a one-to-one relational model where staff operate as organizers, identifying issues that constituents are passionate about and connecting them to CSNDC advocacy campaigns or other relevant civic engagement activities.
- **Strategy 4:** Co-locate and integrate department services (financial and housing counseling and education, down payment assistance, job readiness and digital skills training and coaching, small business development, estate planning, and home loans) to operate in the Computer Learning Center (CLC) space replicating evidence based Financial Opportunity Center model and following best practices. Thus, keeping and

expanding services onsite for residents of CSNDC properties, as well as other high need community members.

- Plan rearrangement of CLC space and physical relocation of staff offices
- Cross-train all Economic Mobility Coaches in integrated job readiness and financial coaching.
- As described above for all programs, train all staff as organizers, identifying issues that constituents are passionate about and connecting them to organizing campaigns and leadership development
- Engage AmeriCorps VISTA volunteers to 1) assess best practices with the Financial Opportunity Center model, 2) identify need for additional staff training, 3) develop practices and systems to assess community impact of new Financial Opportunity Center model, 4) make recommendations for integration of key financial products to incentivize participation in coaching and maximize benefits for community members.
- Explore partnerships with education/training providers.
- Begin physical transition of FOC into CLC space.
- Implement practices and systems to assess the Financial Opportunity Center's community impact: pre/post surveys via online forms, focus groups and/or interviews to capture more in-depth qualitative feedback.
- Explore transitioning services/staff for existing services in financial and housing counseling and education, job readiness, and computer training to be contracted by another service provider.

## C. Case Management

### a. Three Year Goal and Model/Approach

#### *Integration of Organizing/Advocacy with Service Provision*

Case management efforts will be intentionally integrated with community organizing/advocacy so that residents receiving services will be actively encouraged to become engaged in community organizing and advocacy and connect with the organizing staff and the Equity Army initiative.

#### *Hybrid/Clearinghouse Model*

The Case Management Department will use a hybrid model which serves as a clearinghouse for all relevant departments and as a coordinator between external services and residents. The case management staff will connect residents to both internal and external services through established partnerships with social service agencies. The staff will monitor and track cases to ensure residents are receiving services and will establish, cultivate, and foster relationships and

partnerships with local agencies which can support the needs of CSNDC’s residents and create a referral system to keep track of services received.

The Department will be integrated into the Economic Development Department in order to connect case management more closely to the residents using economic development services.

### Strategies:

- **Strategy 1:** In collaboration with community organizing staff, work with key service recipients to help them identify their issues within a broader social/political context, that is, how do they systematically solve the housing or other related issue they face, through collective action. Work closely with the organizing staff to develop individual relationships with service recipients and encourage them to engage with the Anti-Racism/Equity Army Academy and organizing campaigns.
- **Strategy 2:** Assess services residents need from external resources. Research and identify the organizations that can take on these services and develop a plan that would describe how residents are referred to these service organizations.
- **Strategy 3:** Cultivate partnerships with external service providers.
- **Strategy 4:** Develop a database system to coordinate, monitor, and track outcomes of each resident who is referred. Use the data-base system to identify and facilitate those interested in engaging with CSNDC’s organizing/advocacy campaigns.
- **Strategy 5:** Co-market services provide by our new partners, including those services being offered through different venues, such as emails, virtual or in-person meetings, general mailings, phone calls, website/social media.

## VII. Organization Development and Capacity Building Directions

### a. Organizational Structure Staffing Capacity Changes

With the new North Star directions and scaling of organizing/base building and affordable housing development the following changes will be made:

- Vice President of Base Building/Organizing Strategy and Fundraising- This new position will support two departments, Community Organizing and Resident Engagement and the Eco-Innovation Departments. The focus of each department for the future will be to build an “Equity Army,” a large group of active residents/constituents who will lead and

organize through collective action focused on systems change - e.g., affordable housing, racial equity, economic justice, and climate justice issues targeted at root causes affecting the community. The Vice President will assist senior managers in developing resident leaders, who in turn will design and implement grassroots organizing campaigns. This VP will also cultivate funding relationships and partnerships, and actively fundraise for the community organizing campaigns.

- Vice President of Operations -- Chief Operating Officer position title will shift to the Vice President of Operations, with a focus on supporting the Real Estate department in scaling real estate programs, while also continuing to support the Economic Development and the Systems/Database Management departments.
- Case management will move into the Economic Development Department and no longer report into the Chief Operating Officer.
- A new affordable housing acquisition consultant will continue, and additional real estate staff may be hired to support new real estate project scoping, acquisition, and planning
- Several AmeriCorps volunteers and RAY fellows will help support the expansion of base building and capacity building with the Eco-Innovation District Department, while another will support capacity building within the Economic Development Department.
- A new Special Administrative Assistant will support both of the Vice Presidents.
- An additional Community Organizer has been hired and will focus on engaging young adults (millennials) in CSNDC's organizing campaigns.

## **X. Appendix**

- A. Strategic Planning Team Members**
- B. Key Strategic Questions**
- C. Strategic Assessment Stakeholders**
- D. Highlights of Strategic Assessment Key Findings**
- E. Feasibility Assessment Stakeholders**
- F. Highlights of Feasibility Assessment Key Findings**



## Appendix A: Strategic Planning Team Members

1. Gail Latimore, Executive Director
2. Coleen Walker, Board Co-Chair
3. Leroy Gibson, Board Member
4. Tishia Muturi, Board member
5. Jason Boyd, Community Organizing Director
6. Vincent Lo, Director of Administration and Finance
7. Dominica Man, Real Estate Director
8. Liya Mindaye, Case Manager
9. David Queeley, Eco-Innovation District Director
10. Lynn Sanders, Director of Economic Development
11. Marcia Thornhill, Chief Operating Officer
12. Omar Rashed, Systems/Database Manager
13. Drew Vernalia, Asset Manager

## Appendix B: Key Strategic Questions

### Larger Context:

#### Implications of COVID-19 Virus on CSNDC's work

1. What might be the impact of the effects of the Virus on CSNDC's programs and services over the next year? Over the longer term?

#### National/state/local environmental trends impacting CSNDC's future directions

2. What are some of the significant trends in the CDC field and CDC funding that will impact CSNDC's decision making about future directions?
3. How can CSNDC better prepare for recessions and COVID restrictions?

### Programmatic Focus

4. What should be CSNDC's "North Star" two or three priority programmatic directions over the next 3-5 years?
  - a. What makes CSNDC unique is these directions?
  - b. What is the impact CSNDC wants to have?
  - c. How should CSNDC scale up and deepen these areas of work? What might this look like?
  - d. How do we determine if we are using current staff capacity well, to the highest advantage for meeting our 'North Star' priorities and increasing impact?
  - e. What changes would be needed to use our staff in the most effective ways for increased impact?
5. What CSNDC programmatic directions are most impactful?
6. How should CSNDC best integrate and increase its anti-displacement work to help the low- and moderate-income community in CSNDC's service area be able to remain there, particularly for residents of color?
7. What should CSNDC's organizing, and policy advocacy work look like for the future?
8. How should CSNDC use "best practice" models to help their tenants and other community residents further their economic mobility, particularly for residents of color?

### Integration of a Racial Equity Lens

9. How can CSNDC best use a racial equity lens to frame its work and also measure progress? What are effective ways do we effectively develop and integrate the NeighborWork's initiative, *Race, Equity, Diversity, Inclusion*.

## Staff Capacity and Organizational Structure

10. Does CSNDC need to think differently about its staff capacity and staff/organizational structure and operating procedures, regardless of direction?
11. Does CSNDC need to think different about its staff capacity and staff/organizational structure and operating procedures especially as relates to any changes in direction (North Star), strategy and scope? How should the staff's work be re-focused?
12. Should CSNDC continue to use its organizational pillars developed from last strategic plan and if yes, how might they be modified to be consistent with the new Strategic Plan?
13. How should CDNDC decrease silos and better cross-fertilize and integrate its work?

## Financial Resources

14. How should CSNDC increase its financial resources to be able to expand some of its work over the next few years?
15. What are the funding trends that are relevant to future directions?

## Appendix C: Strategic Assessment Key Stakeholders

1. Shirronda Almeida, Mel King Institute, MACDC
2. Jessica Andors, Lawrence Community Works
3. Ahmed Ashour, Small business owner- Jerusalem Discount Furniture
4. Alma Balonon-Rosen, Mass Housing Partnership
5. Kenan Bigby, Trinity Financial
6. Jessica Boatright, Neighborhood Housing Development, City of Boston
7. Kathy Brown, Boston Tenant Coalition
8. LaQuisa Burke, West of Washington Neighborhood Assoc, MassHousing Partnership
9. Thomas Callahan, Mass. Affordable Housing Alliance
10. Andrea Campbell, Boston City Councilor
11. Bruce Ehrlich, Urban Edge
12. Soni Gupta, The Boston Foundation
13. Rachael Heller, Citizen's Housing and Planning Assoc. (CHAPA)
14. Russell Holmes, State Representative
15. Darnell Johnson, Right to the City
16. Emily Jones, LISC, Boston
17. Karen Kelleher, LISC, Boston
18. Chrystal Kornegay, MassHousing
19. Joe Kriesberg, MACDC
20. John Kuppens, Winn Residential
21. Travis Lee, Tlee Development
22. Angie Liou, Asian CDC
23. Paul Malkemus, Talbot Norfolk Triangle Neighborhood Assoc.
24. Steve Meacham, City Life/Vida Urban
25. Chris Norris, MetroHousing Boston
26. Lynn Peterson, NeighborWorks
27. Mariella Puerto, Barr Foundation
28. Kate Racer, Dept. of MA Housing and Community Development
29. Leslie Reid, Madison Park Development Corp.
30. Maridena Rojas, Talbot Norfolk Triangle Neighborhood Assoc.
31. Richard Thall, Jamaica Plain NDC
32. Michael Williams, NeighborWorks
33. Michele White, Small business owner, Soul Food Café
34. Four Resident- Constituents

## Appendix: D: Highlights of Strategic Assessment Key Findings

Key findings for the Strategic Assessment included the following:

### Perceptions of CSNDC and its Accomplishments

- CSNDC is highly respected in the sector, particularly the work of its executive director, Gail Latimore. It is known for its development of affordable housing, innovation and thinking creatively. Outstanding programs and initiatives include the following: Men of Color, Eco-Innovation District, the Fairmont Line Initiative (in collaboration with two other organizations), its engagement of Black and Brown communities in Dorchester, and its responsiveness to helping the community during COVID-19.

### Unmet Needs in Dorchester

- Most significant needs included: Keeping rents stable and affordable; community organizing to build a more powerful community; economic inequality in communities of color; living wage jobs, especially for communities of color; resident leadership development; affordable transportation, resources for seniors, free Internet, financial support for businesses.

### Upcoming Challenges

- With competition in affordable housing development, CSNDC will need to be creative and innovate with future development.
- Rents in Boston are continuing to increase as well as costs for home ownership.
- Sustainability to fund work beyond housing
- Need for more affordable commercial space for small business owners

### Implications of COVID-19

- COVID-19 has presented many challenges, including the need for increased affordable housing, increased displacement, small business viability, increased family stress, increased need for community organizing
- COVID-19 has presented many opportunities, including (a) the increased awareness for the need for racial equity and justice, (b) the increased focus on addressing income inequity, (c) opportunity for CDCs to acquire formerly market rate properties and convert to affordable housing.
- CSNDC can prepare for long-term effects of COVID-19 on the economy and communities by (a) keeping eye on multi-unit properties with owners wanting to sell. (b) seeking opportunities to partner with other organizations, (c) seeking opportunities to be more visible in the community.

### Funding Trends

- Increased focus on funding racial equity- related programs, especially organizations led by leaders of color are well positioned for future funding

- Climate justice (national and local funding)
- Increased focus on community engagement and organizing, especially with a racial equity lens
- Increased focus on affordable housing needs, rental, and homeownership
- Potential increase in funding for Health and housing, especially through partnerships with hospitals

### **State-wide and Boston Trends**

- Increased support for rent control/housing stabilization, eviction prevention
- Increased need for more focus on policy advocacy and organizing for affordable housing and issues listed above
- Increased economic inequality and racial disparities, especially in Black and Brown communities
- Small business closings (result of COVID)
- Increased homelessness

### **Recommended strategies to increase affordable housing development**

- Partnerships with other developers, acquisitions of multi-unit housing and commercial space, expand to other geographic areas in partnerships, seniors, free Internet, financial support for businesses,

### **Recommended Advocacy and Organizing**

- CSNDC needs to expand its organizing and focus on CSNDC organizing campaigns, including affordable housing issues, rent control, tenant rights, evictions, right to counsel bills, combating NIMBYism and affordable housing.
- Should look to successful organizing campaigns from other areas as models for CSNDC
- Connect its Resident Leadership Institute more closely with CSNDC's organizing campaigns, rather than sending them off to other organizations.

### **Recommended strategies for racial equity**

- CSNDC should take a more significant leadership role, especially focusing on racial inequities in housing issues, advocacy, evictions, rent stabilization
- Connect with current movements in Boston, such as Black Lives Matter
- Hold forums and community dialogues for residents to discuss systemic racism and implications for community
- Focus on leadership pipeline, especially resident leaders of color
- Partner with Mel King Institute's mentoring program for emerging leaders of color

### **North Star Priorities**

- There was widespread support for CSNDC to focus its work more, especially on increasing affordable housing development and expanding its community organizing work/building a much larger base of residents active in CSNDC's organizing campaigns, and positioning,

## Appendix E: Feasibility Study Stakeholders

### Real Estate Scaling:

1. Kenan Bigby, Managing Director, Trinity Financial
2. Roger Brown, Managing Director of Real Estate Development, Preservation of Affordable Housing (POAH)
3. Phil Giffie, Executive Director, Neighborhood of Affordable Housing (NOAH)
4. Bill Grogan, President, Planning Office of Urban Affairs, Archdiocese of Boston (POUA)
5. Oliver Gross, Executive Director and Keith Franklin, Real Estate Director, New Urban Development, Miami, FL (affiliate of Urban League)
6. Sarah Harris, Executive Vice President, Strategy, Partnerships, and Production, Aeon
7. Claude Hicks, VP of Real Estate; and Ian Rawhauser, Director of Real Estate Strategy, HDC Mid Atlantic,
8. Angie Liou, Executive Director, Asian CDC
9. Linda Mandolini, Executive Director, Eden Housing, Hayward, CA (NeighborWorks affiliate)
10. Leslie Reid, Executive Director, Madison Park CDC
11. Sue Reynolds, Executive Director, Community Housing Works, San Diego, CA (NeighborWorks affiliate)
12. Adam Stein, Executive Vice President, Winn Development

### Organizing and Advocacy

13. Pam Bender, Senior Organizer, MACDC
14. Andres de Castillo, Co-Director Right to the City Boston,
15. Karen Chen, Executive Director, Chinese Progressive Association
16. Steve Meacham, Organizing Coordinator, City Life/Vida Urbana (from strategic assessment)
17. Francisco Ramos, Director of Community Organizing, NewVue Communities
18. Melinda Vega, Community Building and Environment Coordinator, Neighborhood of Affordable Housing (NOAH)

### Funding and Finance

19. Jennifer Aronson, Boston Foundation
20. Kalila Barnett, Barr Foundation
21. Maria Mulkeen, Hyams Foundation
22. Gail Sokoloff, United Way
23. Michael Williams, NeighborWorks
24. Prentiss Zinn, Miller Foundation

### Services Transition

25. Tom Callahan, Mass. Affordable Housing Alliance (MAHA)

26. Gregg Cothias, Housing Supports Co-location Manager, MetroHousing Boston
27. Teronda Ellis, CEO, Jamaica Plain NDC
28. Katie Marcial, Assistant Deputy Director for Boston Home Center, City of Boston  
DND
29. Constance Martin, Deputy Director of Financial Empowerment, City of Boston,  
Mayor's Office of Financial Empowerment
30. Perry Newman, CEO. and Kimberly Lyle, Director of Strategy, Dorchester Bay  
Economic Development Corporation
31. Emily Patrick, Senior Neighborhood Business Manager, City of Boston, Small  
Business
32. Leslie Reid, CEO, Madison Park CDC
33. Maritza Rosario, Greater Boston Regional Director, The Food Project
34. Stephanie Samtizo, Case Manager, Action for Boston Community Development,  
Mattapan
35. Tammy Simmons Dixon, Director of Victory Housing; and Caitlin Axelrod-McLeod,  
Deputy Director of Housing, Victory Programs



## Appendix F: Highlights of Feasibility Assessment Key Findings

Key findings for the assessment included the following:

### Affordable Housing

- Support for CSNDC's expansion of developing affordable housing as a North Star priority
- CSNDC is in an advantageous position to geographically expand, especially in neighboring, underserved communities, such as Mattapan and in gateway cities, given its focus on racial equity and its BIPOC leadership within the staff and Board. It will be important, however, to build relationships with partnering organizations based in those communities prior to considering expansion opportunities.
- Complementary, strategic partnerships will be important for expansion and scaling, such as private developers, tenant associations
- Consider expiring use opportunities and larger project sizes
- Tapping the equity in existing properties to amass significant capital pools that can be used for scaling real estate is a key strategy

### Community Organizing/Base Building and Advocacy

- Significant support to scaling up the organizing and increasing the numbers of activist residents and resident leaders to lead systems and resource allocation change organizing campaigns
- Importance of bringing people together who are experiencing similar housing problems (evictions, rising rents, tenant rights issues, lack of affordable housing; racial justice issues, and/or climate environmental justice issues), and move them to work through collective action/systems change to affect their personal issues.
- Train all staff in community organizing so they are able to help residents and clients become engaged in CSNDC's campaign organizing
- Develop resident leaders to lead CSNDC's organizing campaigns, with staff in supporting roles.
- Connect the resident leadership training more closely with CSNDC's organizing campaigns
- Connect with coalitions that are successfully engaged in organizing campaigns focused on displacement, evictions, tenant rights/affordable housing and environmental justice.

### Funding Opportunities and Implications

- Many funders have been focusing on funding racial equity and grassroots organizations led by BIPOC, prioritizing systems change and intersectionality of issues. (e.g., link between affordable housing, racial equity, and climate justice)

- Funders' feedback included that CSNDC is well-positioned as a BIPOC organization who is a leader in climate and environmental justice in Boston, combining green job creation and organizing/advocacy.
- Potential for increased funding for racial equity, climate, and environmental justice issues

### **Service Transition**

- Nonprofit service organizations were queried about their alignment with CSNDC's programs constituency, values and program principles and interest. Some expressed significant interest in exploring a possible partnership or some other arrangement with CSNDC for the assumption/take over or provision of specific direct services, especially for financial capabilities, first time homebuyer education, small business technical assistance, urban farming, and computer training.