

Dorchester Bay  
Economic Development Corporation  
Strategic Plan  
January 2018 – December 2020

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**APPROVED BY THE BOARD OF DIRECTORS: DECEMBER 5, 2017**

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## **Executive Summary**

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Dorchester Bay Economic Development Corporation (DBEDC) is a community development corporation founded in 1979. Over our 38 year history, we have worked in partnership with local leaders and stakeholders to build and preserve 1,100 units of affordable housing and over 200,000 square feet of commercial space, to engage residents in community life, and to support a robust economy through small business support and economic development.

In early 2017, we launched a comprehensive strategic planning process to chart our course for the next three years. A joint board and staff strategic planning committee led the process, which featured an assessment of our work and strategizing about our future. All of our staff and board participated in the creation of this plan which will be implemented for a three year period: 2018 – 2020.

### **Vision**

Our vision for the future is one in which Dorchester will be known as a vibrant community where residents of all ages, incomes, and abilities live, work, shop, and play. The fear of gentrification and displacement will have been addressed by holistic improvements in opportunity for all – including affordable housing, commercial and small business development, and greater economic self-sufficiency for residents. This diverse community will be recognized as a welcoming place with greater access to recreation, healthy food, and equitable transportation, and where culture and art are catalysts for community building and economic growth. Residents have pride in Dorchester. From one generation to the next, residents are leaders of the community and give back to strengthen civic life.

Dorchester Bay EDC will be known as a place-based community-builder, and will be seen as a catalyst for community and personal transformation. Through innovation, best-practice based programs, and strong partnerships, Dorchester Bay will have developed a national reputation for excellence and results. The organization will be led by a diverse board of directors with residents, community members, and business leaders, working effectively together with a well-respected and talented professional staff.

### **Mission**

Dorchester Bay EDC acts to build a strong, thriving, and diverse community in Boston's Dorchester neighborhoods. Working closely with neighborhoods, residents, businesses and partners, we access resources to:

- Develop and preserve home ownership and rental housing across income levels
- Create and sustain economic development opportunities for businesses and individuals
- Build community through organizing, civic engagement, and leadership development

### **Strategic Priorities and Goals**

#### **Priority #1: Deploy a holistic, equitable approach to community development**

##### ***Goals***

1. Increase the supply of housing affordable to a range of individuals and families that contributes to neighborhood stability, particularly to those with low-to-middle incomes.

Ensure that the DBEDC portfolio of properties continues to meet the highest standards of excellence, serving the needs of current residents for quality, safe, affordable, and stable housing.

2. Foster economic development in Dorchester by developing and managing commercial real estate properties that are assets to the community, increase the number of vibrant and growing small businesses that align with community needs, and grow local job opportunities.
3. Increase the health of our community by promoting healthy lifestyles and access to health and recreational services.
4. Increase engagement with art and culture as catalysts for community building and economic growth.

### **Priority #2: Increase resident leadership, civic engagement, and public policy advocacy**

#### ***Goals***

1. Build the leadership and level of political power among lower- and moderate-income residents in DBEDC housing and in the broader community.
2. Increase public policy advocacy and civic engagement capacity among residents in Dorchester Bay housing and the broader community that results in positive, localized neighborhood impact.

### **Priority #3: Enhance the prospects for social and economic mobility for residents**

#### ***Goals***

1. Increase economic self-sufficiency by building financial skills and assets.
2. Increase economic self-sufficiency through livable wage jobs and sustainable employment.

### **Priority #4: Ensure that DBEDC is a strong, nimble, and sustainable organization with the infrastructure and capacities to reach our vision.**

#### ***Goals***

1. Develop and retain a diverse staff with the necessary professional capacities, create an inclusive culture, and foster cross-departmental initiatives.
2. Ensure an engaged, informed, and active Board of Directors that offers strategic leadership and strives for excellence in governance.
3. Strengthen DBEDC financially, with diverse revenue streams sufficient to meet the goals of the organization, a risk management system, and a high quality asset management system.
4. Raise the visibility and profile of DBEDC in the community and with stakeholders through effective outreach and communication.
5. Strengthen systems for effective outcome measurement including technology, staff skills, and the capacity for data collection, analysis, and reflection to support program and organizational improvements.

## Section I: Introduction and Background

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### Introduction

Dorchester Bay Economic Development Corporation (DBEDC) is a community development corporation founded in 1979. Over our 38 year history, we have worked in partnership with local leaders and stakeholders to build and preserve 1,100 units of affordable housing and over 200,000 square feet of commercial space.

Dorchester Bay EDC was founded by local civic associations to address the problems of economic disinvestment, unemployment, crime, community tensions and the shortage of quality affordable housing undermining Boston's Dorchester neighborhoods. Dorchester Bay's work has been recognized locally and nationally for our accomplishments serving our community. The bricks and mortar we have built are physical manifestations of our work, but the core of our work is about strengthening our community, which is made up of the people who live in our service area. Our work has created nearly over 1200 new jobs and includes over \$7.5M in small business and home improvement loans, which in turn created 850 additional jobs. We helped to initiate the nationally-recognized Fairmount-Indigo CDC Collaborative, which, with the Fairmount Transit Coalition, helped catalyze investment of over \$200 million in public transit improvements and over 900 housing units. We have developed an award-winning re-entry program to support ex-offenders, placing more than 350 individuals in jobs while maintaining a recidivism rate of less than 7%. We have proudly supported more than 2841 local youth and adults in a variety of camp, after school, technology, community organizing, and leadership development programs.

### Setting a Vision for the Next Three Years and Beyond

In early 2017, we launched a comprehensive strategic planning process to chart our course for the next three years. A joint board and staff strategic planning committee led the process. Members included Elrette Marion, Daryl Wright, Mary Walker, Leighton Richardson, Christine Green, Max Shapiro, Perry Newman, Jessica Boatright, Mary Wambui, and Dan Gelbtuch. With the support of our consultant Diane Gordon, we set a vision for the future, identified key strategic priorities, and articulated goals, strategies, and measures of success. Throughout the process, there was extensive participation from both the board and the staff. 36 people attended a retreat in June, 31 people participated in workgroups that developed the details in the plan, and 41 attended a retreat in October.

The plan will be implemented beginning in January 2018, and continue until December 2020.

### Context

Prior to setting our strategic direction for the next three years, DBEDC conducted an assessment of our prior work and our current environment to help set the stage for future decision-making. Through surveys, focus groups, and interviews, internal and external stakeholders shared their perspectives on DBEDC's strengths, challenges, and opportunities for the future. In total, 110 people participated in the assessment, ranging from residents who live

in our properties, to community partners and stakeholders, funders, professional partners, and constituents of our programs. (See Appendix for a list of people who participated.) Findings from this assessment were combined with a review of outcomes data, community needs, and demographic information about the Dorchester neighborhoods DBEDC serves. At a retreat in June, the board and staff reviewed and analyzed the report and drew the following conclusions that would inform the work ahead:

- We want to be seen as community builders, not only developers;
- Partnerships are essential in order for DBEDC to carry out our work and to strengthen the community;
- The strategic plan should articulate a clear strategy with meaningful and measurable outcomes;
- Systems for evaluating the way growth opportunities align with the strategic planning goals and collecting accurate data to measure outcomes will make it a “living” document;
- We need ways to effectively communicate the results of our work internally and externally;
- Increasing our visibility is important in order to communicate most effectively DBEDC’s community impact;
- Organizational financial self-sufficiency and diversification of funding sources are important goals;
- Greater alignment between the board and the staff, and a greater understanding of the roles/ focus of each are needed;
- The board should continue to expand its presence and engagement in the community; and
- Staff training, cross-departmental work, breaking down silos, and on-going team building should continue.

### **Opportunity Statement**

While Dorchester Bay has had great success in serving the communities in its service area, the demand for greater economic opportunity, community services and affordable housing still far exceeds available resources. Dorchester Bay’s service area spans a wide range of neighborhoods, including Upham’s Corner, Dudley Street, Columbia/Savin Hill, Bowdoin Geneva and the Quincy Corridor. The neighborhoods are tremendously diverse, with 57% of the residents African American and Cape Verdean, 30% White, 19% Latino and 9% Asian. 33% of the residents in our service area are foreign born.

When we began our strategic planning efforts in early 2017, in some parts of our service area, nearly 74% of residents earned less than 80% of the area median income. While statistics vary by neighborhood, as a whole the communities in our service area have a 33% unemployment rate, compared to the unemployment rate for the Boston labor market area of only 2%.

Nearly 68% of households in our service area are rent-burdened, meaning they pay more than 30% of their income for housing. Our service area has a very high risk of foreclosure (18.4 out of 20 point measurement scale). An illustrative marker of rising unaffordability in our neighborhood is the 38% rise in condominium prices from 2008 – 2016. The pressures from rising rents and condominium prices increase the appeal for private owners of subsidized

housing to flip these units to market units. The American Community Survey estimates that 22% of the low-income population of Dorchester will be forced to relocate, and those vacancies will be filled by people with incomes over \$100,000.

The demand for positive change and increased opportunities for economic empowerment and housing stability are clear from the current environment in our neighborhoods. In this environment, Dorchester Bay remains fully committed to helping to stabilize and improve the communities we serve.

## Section II: Vision and Mission

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### Vision Statement

#### External Vision

By the year 2028, Dorchester will be known as a vibrant community in which residents of all ages, incomes, and abilities live, work, shop, and play. The fear of gentrification and displacement will have been addressed by holistic improvements in opportunity for all. The availability of quality and sustainable housing affordable to a wide-range of households has significantly increased over the last ten years. Dorchester neighborhoods are enriched by robust commercial districts and local small businesses that provide access to services and resources that local residents want and need. Local residents, including those returning to the community from prison, enjoy greater economic self-sufficiency and access to livable wage jobs. Together, these changes have ensured that a wide-range of residents can continue to call Dorchester Bay's service area home.

This diverse community will be recognized as a welcoming place. Residents have access to recreation, healthy food, and equitable transportation to support health and healthy living. Culture and art are catalysts for community building and economic growth. Residents take pride in Dorchester. From one generation to the next, residents are leaders of the community and give back to strengthen civic life.

#### Internal Vision

By the year 2028, Dorchester Bay Economic Development Corporation will be known as a place-based community builder that employs an equitable, holistic approach to community development. Dorchester Bay's work is seen as a catalyst for community and personal transformation. The organization's hopeful vision has been successfully translated into action and impact.

Through innovation, best-practice based programs, and strong partnerships, Dorchester Bay has developed a national reputation for excellence and getting results. It is a hub and a connector to resources to meet emerging community needs. Dorchester Bay takes pride in its commitment to grassroots leadership development and its effective approach to civic and community engagement.

The organization is led by a diverse board of directors with residents, community members, and business leaders, working effectively together with a well-respected and talented professional staff.

### Mission Statement

Dorchester Bay EDC acts to build a strong, thriving, and diverse community in Boston's Dorchester neighborhoods. Working closely with neighborhoods, residents, businesses and partners, we access resources to:

- Develop and preserve home ownership and rental housing across income levels
- Create and sustain economic development opportunities for businesses and individuals
- Build community through organizing, civic engagement, and leadership development



## Section III: Overview to the Strategic Priorities

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DBEDC has conceived and constructed this strategic plan so as to achieve impact both at the community level and as an organization operationally. The first three priorities focus on how we want to strengthen the communities we serve. These priorities are interdependent, and we believe working towards these goals collectively will further our ability to reach our vision for Dorchester. The fourth priority focuses on Dorchester Bay as an organization itself. By setting priorities for our work externally and internally, we will match our aspirations with the resources we need for the greatest likelihood of success.

### **Priority #1 – Deploy a Holistic, Equitable Approach to Community Development**

One of the key conclusions we drew from our assessment was the desire to be community builders, not only property developers. In order to achieve this vision, we understand that there is not a straightforward, linear approach to the complex challenges and conditions in the community. Rather we need to look at the community from a variety of perspectives. The strategies described in this section build from our expertise as housing and commercial real estate developers and an organization dedicated to economic development. These are combined with a range of goals intended to promote other place-based improvements that foster healthy living and a vibrant community. Our goals therefore include efforts to strengthen the economic base with both bricks and mortar and employment, foster healthy living through greater access to bike and walking paths and green space, improve access to equitable transit, and promote arts and culture.

### **Priority #2: Increase Resident Leadership, Civic Engagement, and Public Policy Advocacy**

Our history and our vision are rooted in the value of resident leadership. In this strategic plan, we intend to take this commitment even further by reinvesting in the intentional work of training and cultivating new resident leaders in our service area and directly connecting them to civic action. We understand that while we can make many important improvements in the community through our place-based initiatives as outlined in Priority # 1, there are many influential factors that we alone cannot solve. By engaging residents in public policy advocacy, and by working in coalition with local and statewide partners, we seek to address systemic barriers that if resolved, can further support our goals and vision for Dorchester.

### **Priority #3: Enhance Potential for Social and Economic Mobility for Residents**

Critical to our holistic vision for Dorchester is the desire to support residents to build their own future as they define it. Whether it is by enhancing their financial skills, building their assets or savings, paying for education, buying a home, or other goals, DBEDC is committed to working with residents in our community to access the resources they need. We also believe that economic resilience and mobility are integrally tied to sustainable employment. Building upon our record of achievement in helping to establish the successful Fairmount Job Referral Network and other programs, we intend to support residents in finding and keeping jobs that have meaning, pay a livable wage and can lead to future employment opportunities.

**Priority #4: Ensure that DBEDC is a strong, nimble, and sustainable organization with the infrastructure and capacities to reach our vision.**

Dorchester Bay approaches this strategic plan in a healthy financial and organizational position. We know, however, that we have to keep building our organization and our capacity in order to reach our ambitious vision for the community. In this plan, we set goals for staff and board of director's development, strengthening our financial resources, increasing visibility, and supporting an effective outcome measurement system to be used for program and organizational improvement.

## Section IV: Strategic Priorities, Goals, and Strategies

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### Priority #1: Deploy a holistic, equitable approach to community development

The foundation of our work is the belief that for our neighborhood, and the people in it, to thrive, we need affordable homes for people to live in, jobs filled by local residents that provide healthy wages, and business owned by community members that provide wealth. While each of these goals could be accomplished separately, our belief is that we will accomplish more if all of our work is animated by this holistic framework.

Our real estate work should not simply be about the brick and mortar work of building affordable homes in our neighborhood. It is also about creating economic opportunity for those building the homes through local, minority and female workforce participation as well as hiring minority and women owned subcontractors. The brick and mortar must also go beyond housing, to include commercial spaces for jobs and services in our neighborhood. Nor are commercial spaces themselves sufficient, as our goal is to ensure that the jobs in those commercial spaces are prioritized for people in our neighborhood, and that the jobs come with a living wage. And more than just providing space for local businesses, our goal is to ensure that local businesses have the skills and financing necessary to thrive.

Our community development goals are defined broadly, and we will best meet these goals by looking holistically at how all of our strategies can reinforce each other.

#### **Goals, Strategies and Measures of Success**

***Goal #1: Increase the supply of housing affordable to a range of individuals and families that contributes to neighborhood stability, and ensure that the DBEDC portfolio of properties continues to meet the highest standards of excellence, serving the needs of existing residents for quality, safe, affordable, and stable housing.***

Over the next 3 years, housing production will largely be focused on developing affordable rental housing. While funding resources for homeownership are limited, we also recognize the need to create homeownership opportunities to contribute to neighborhood stability, and will thus continue to work on projects and in partnerships where feasible to increase homeownership in our service area.

DBEDC prides itself on being a responsible owner in managing assets and in delivering services that support residents' quality of life. Working with professional property and asset managers, and with resident services professionals, we are dedicated to ensuring that the properties we build and manage offer the best opportunity for our residents. We also believe that families living in housing with resident services have higher rates of housing stability, are more likely to be involved or volunteer in their community, which contributes to residents taking better care of their housing and looking out for their neighbors. Family properties with resident services are also more likely to perform better on financial indicators related to residents' payment of rent and turnover.

## **Strategies and Measures**

### **1. Continue to serve Dorchester’s low-income residents while expanding rental housing opportunities to middle and moderate-income residents.**

- a. Use Dorchester Bay’s Housing Project Selection Criteria (see appendix) to seek and evaluate potential projects.

#### **Measures**

- Dedicate at least 80% of new rental units produced between 2018-2021 to residents earning up to 60% of area median income and up to 20% of units for residents earning between 60% -120% of area median income.

### **2. Identify new pipeline projects to continue Dorchester Bay’s production and preservation pace of one project per year.**

- a. Foster partnerships and utilize city programs to target vacant and underutilized land.
- b. Deploy universal design features to create housing for people of all ages.
- c. Use asset management indicators and tools to responsibly expand our portfolio
  - Monitor existing portfolio to preserve housing as affordable.
  - Identify risks and opportunities posed to existing portfolio by new or existing development opportunities
  - Collaboration between real estate and asset management functions to provide a thorough risk analysis of new opportunities, to be used as part of the selection criteria for new projects

#### **Measures**

- At least 3 pipeline projects in active predevelopment or further by 2021.

### **3. Contribute to the stability of the local Dorchester economy by providing homeownership opportunities for low- and moderate-income families.**

- a. Develop homeownership units as part of the Indigo Block project.
- b. Seek other opportunities for homeownership in partnership where feasible.

#### **Measures**

- By 2019, 9 homeownership units are in construction as part of the Indigo Block project affordable to homeowners earning up to 100% of area median income.

### **4. Provide high quality services to residents that support their needs and promote stable tenancies.**

- a. Provide eviction prevention services (payment plans, budget counseling, access to benefit programs) to anyone in danger or on a spectrum towards eviction
- b. Coordinate with property management
- c. Partner with other agencies to provide social services to meet needs to support stable tenancies

#### **Measures**

- Zero preventable (non-financial) evictions
- Minimal financially-related evictions

**5. Ensure third party property management firms meet the highest standards for excellence in managing DBEDC's properties.**

- a. Monitor performance through regular contact and annual evaluation of services.
- b. Meet all asset management performance metrics. [See organizational priorities]

Measures

- Third party property management firms deliver services according to performance goals.

**6. Collaborate with property management to identify properties with a significant amount of aging residents and to install features that support aging in community. Choose one property to focus efforts on as a pilot for future work across the portfolio.**

Measures

*Outputs*

- Comprehensive assessment of resident needs at pilot property
- Physical improvements in at least 50% of the pilot property to the extent that the property's operating budget and available 3<sup>rd</sup> party funds support

*Outcomes*

- At least 50% of residents who receive upgrades report an increase in quality of life and/or ability to remain in their apartments.

***Goal #2: Foster economic development in Dorchester by developing and managing commercial real estate properties that are assets to the community, and by increasing the number of vibrant and growing small businesses that align with community needs.***

Dorchester Bay's commercial real estate has a proven track record of being a catalyst for revitalization and economic development in our target area. Our properties contribute to neighborhood improvement and create permanent jobs. Dorchester Bay has a long history of supporting the development of small businesses which are an integral part of a healthy neighborhood. In this strategic plan, we have developed a renewed focus on this aspect of our work.

**Strategies and Measures**

**1. Develop commercial real estate as a vehicle for economic development and permanent job creation.**

- a. Use Dorchester Bay's Commercial Project Selection Criteria (see appendix) to seek and evaluate potential projects.

Measures

- Bring 2 -3 existing commercial developments to construction within 3 -year period (Indigo Block, Pierce, Dudley Miller).
- Identify 2 - 3 other commercial development opportunities.
- Strive to exceed minimum sustainability standards on every project, striving to push the limits on green design, construction, and operations wherever possible and as is appropriate for each project.

**2. Bolster neighborhood loan fund to provide more money to lend to area businesses, to invest in DBEDC projects, and to launch new initiatives.**

- a. Complete a capitalization and marketing plan for the fund
- b. Increase program related investments to the fund
- c. Raise further CRA funding
- d. Explore innovative financing tools including a partnership with the Boston Impact Initiative.

Measures

- Existing fund grows from \$200,000 in loans outstanding, to \$2.5 million by 2020.
- Total assets grow from \$600,000 to total assets of \$3 million by 2020.

**3. Increase number of borrowers to 75 by 2020.**

- a. Lend according to an articulated criteria for borrowers (see appendix)

Measures

- Increase number of loans to 75 by 2020
- Create a minimum of 75 total jobs both FTE and PTE by 2020

**4. Evaluate progress made in building loan fund to meet community needs, and reflect on implications for other economic development strategies for consideration in the future.**

- a. Consider the need for a community bank or credit union. Evaluate the impact of such a strategy on the growth of the loan fund and the best role for DBEDC to take as a partner in the effort.

Measures

- Internal evaluation and reflection to be conducted during 2019
- Report issued to the board of directors by end of 2019

***Goal #3: Increase the health of our community by promoting healthy lifestyles and access to health and recreational services.***

Research has shown that positive health outcomes are closely tied to zip code, with lower-income neighborhoods suffering from lack of access to healthy food, places for active recreation, or affordable public transportation. At Dorchester Bay we intend to counter this trend by intentionally promoting the tie between housing and health, and using our resources to promote greater health among our community's residents.

**Strategies and Measures**

**1. Promote health through access to quality preventative and other health care services.**

- a. Collaborate with Upham's Corner Health Center to provide health services on-site at our properties and by encouraging our residents to go the Health Center directly.
- b. Seek opportunities to expand health center partnerships either as a development partner, or other means to expand health services in our target area.

Measures

- At least 3 on-site health programs offered at DBEDC properties per year

- Include on-site health-related services in at least one pipeline project in predevelopment or further by 2020

**2. Promote greater health by increasing access to healthy food choices.**

- a. Partner to support Healthy Champions program or similar efforts (BPHC, BAC, UCHS, etc.).
- b. Distribute fresh fruits and vegetables to residents on a weekly basis.

Measures

- 250,000 lbs. fresh food delivered to 7,000 residents and community members

**3. Use DBEDC’s housing developments as a health care tool.**

- a. Create healthy housing through sustainability design features
- b. Explore supportive housing models for seniors or others
- c. Where feasible increase access to green space, exercise facilities, secure bike racks

Measures

- Strive to exceed minimum sustainability standards on every project, pushing the limits on green design, construction, and operations wherever possible and as is appropriate for each project.
- Strive to maximize healthy housing features and/or health related services delivered on site in all new projects.

**4. Increase access to active recreation and public transportation through partnerships.**

- a. Work in partnership with at least one initiative to increase green space and active recreation facilities in Dorchester (Emerald Necklace expansion, Greenway, Excer-trail) where we can add value
- b. Work with the Fairmount Transit Coalition to increase access to equitable transportation for Dorchester residents.

Measures

- Magnolia Street Community Garden completed.
- Partner to activate one Fairmount Greenway pilot segment between New Market and Dudley Square.
- 16 community residents leasing beds from the Magnolia Street Community Garden.
- 5 community residents part of Magnolia Street Community Garden stewardship group that maintains the garden.

***Goal #4: Increase engagement with art and culture as catalysts for community building and economic growth.***

Art and culture contribute to quality of life. They help to build bridges, tap into hidden parts of a person’s being, and bring joy. Patrons of art and culture also contribute to economic vitality of a neighborhood. In this strategic plan, Dorchester Bay is committing to foster greater access to and participation in art and culture.

## **Strategies and Measures**

### **1. Support the development of Upham's Corner as an arts and culture innovation district.**

- a. Use the renovation of the Pierce Building as a hub for community gatherings and art and culture in coordination with the City of Boston's efforts to establish an arts and culture district in Upham's Corner.

#### **Measures**

- Prioritize tenants for the Pierce building whose work aligns with the arts and culture and community convening goals of the redevelopment.

### **2. Celebrate creativity and cultural diversity that exists in the community.**

- a. Highlight the cultural assets that exist in the community such as the Strand Theater, and encourage greater participation in/ with those assets
  - Provide free tickets for residents to attend events
  - Hold DBEDC events at cultural venues to increase exposure
  - Utilize services of local artists in DBEDC material production
  - Display the work of artists in our offices and properties
- b. Help promote the work of cultural organizations by partnering with groups such as the Fairmount Innovation Lab

#### **Measures**

- DBEDC holds 3 arts-related activities/ events per year and brings resident groups to these events.
- 3 local artists contracted with by DBEDC for production of materials

### **3. Encourage residents and youth to engage directly in the artistic process.**

- a. Invite residents and youth to participate in a mural project or other creative process
- b. Bring in partners to run art classes
- c. Showcase residents and youth art work in properties and our offices

#### **Measures**

- 50 residents & youth grades 1-12 participate
- 12 pieces of resident or youth art displayed through DBEDC venues each year.



## **Priority #2: Increase resident leadership, civic engagement, & public policy advocacy**

At the core of our work is a commitment to resident empowerment both within our properties and in the broader community. We believe that if residents are engaged in civic life and working together with partners, we can advance policies that strengthen and improve the community for those who live here. We also recognize that people – both adults and youth – strengthen their leadership capacities by taking actions that are meaningful and achieve impact. Therefore, we will intentionally link our efforts to support leadership growth with advocacy campaigns and other strategies to promote policies that benefit our community.

### **Goals, Strategies and Measures of Success**

#### ***Goal #1: Build the leadership and level of political power among lower and moderate income residents in DBEDC housing and in the broader community.***

Dorchester Bay recognizes that while some people are ‘born leaders’ or come by it naturally, most people benefit from both formal and informal leadership training and coaching to reach their potential. Moreover, we understand that if we want to significantly increase the number of people from our community who serve in meaningful leadership roles, we have to be intentional about the steps we take such as recruiting residents, organizing comprehensive training programs, and tying training with direct action so that emerging leaders have meaningful opportunities to practice what they have learned. We believe that people become leaders by doing, and that coaching leaders as they grow and learn is critical to success. Our goal is focused on working with residents in the properties we own and also in the broader community.

### **Strategies and Measures**

- 1. Engage in direct conversations with Dorchester Bay residents, other Dorchester residents, and youth to identify issues, build relationships, and surface meaningful avenues for engagement.**
  - a. Conduct one-on-one discussions with residents
  - b. Follow-up with residents who indicate interest to further engage and build relationships
  - c. Support resident driven meetings to identify potential leaders
  - d. Engage non-English speakers in conversations around community issues

#### **Measures**

##### ***Outputs***

- 140 one-on-one conversations held quarterly
- 70 follow-up conversations held quarterly
- 20 resident identified as potential leaders and referred to training program yearly
- 175 non-English speakers resident engaged annually

##### ***Outcomes***

- 5 resident-driven meetings quarterly
- 3 residents on the Board of Directors at all times

## **2. Build community in DBEDC housing.**

- a. Tenant associations organized in all DB properties
- b. Community building events/ activities designed and led by residents
- c. Engage non-English speakers in community building activities
- d. Tenants have a voice in the development process to ensure that new properties have community building spaces built in them

### Measures

#### *Outputs*

- 110 tenants participate in tenant associations at 7 properties
- 15 different types of community building events organized and held annually
- 600 tenants participate from 9 properties in community building events
- Hold quarterly all-property meeting with at least 40 tenants at each meeting
- 175 non-English speakers participating

#### *Outcomes*

- Tenants and others lead design and organizing of 15 types/ 100 community building events annually

## **3. Establish a leadership training program paired with civic action.**

- a. Research existing programs that are aligned with DBEDC needs and identify training components and how DBEDC will roll-out program
- b. Develop strategies to recruit and engage residents for training; build-in incentives to encourage participation; target lower - moderate income adults
- c. Recruit residents from existing DBEDC programs to participate
- d. Connect residents attending trainings to DBEDC equity/ civic engagement agenda
- e. Find opportunities to build resident leadership for system changes advocacy outside of formal leadership training programs
- f. Organize a voter registration drive @ all DBEDC properties and in the broader service area
- g. Ensure that non-English speakers engage in leadership training and civic action

### Measures

#### *Outputs*

- Leadership training program established by March 2018
- 40 residents participating in training program by June 2018; 120 trained by Dec. 2020

#### *Outcomes*

- By December 2018, 45% of trained residents engaged in a civic effort at DBEDC or across community-wide efforts
- By December 2018, 25% of trained residents are working on a systems change effort (Gentrification/Right to the City); 70% trained residents are working on a systems change effort by December 2020
- By December 2018, 70% of DB service area/Upham's Corner residents are registered to vote; 70% of DB service area/ UC residents registered to vote by Dec. 2020
- 5 non-English speakers trained and engaged in civic action

**4. Support leadership growth and increasing meaningful leadership roles within DBEDC and in the broader community.**

- a. Clarify purpose and meaning of DBEDC membership, and set goals
- b. Create and support pipelines for leadership growth within the DBEDC governance structure
- c. Create and support pipelines for leadership growth in civic engagement and community/ campaign organizing including from DBEDC program participants
- d. Create and support pipelines for leadership growth in work/ career/ educational spheres
- e. ESL classes are organized and offered to service area residents so that non-English speakers have ways to meaningfully play a leadership role

Measures

*Outputs*

- 100 members annually
- 30 leadership opportunities at DBEDC annually

*Outcomes*

- 150 of volunteer leaders actively engaged annually
- 60 of leaders connected to other local community organizations; and on different issues 40 of leaders DBEDC trains/ engages with who pursue further training and/or are employed where they are using their community organizing skills

**5. Support leadership growth and increasing meaningful leadership roles for youth**

- a. Youth Leadership Institute
- b. YF leaders connect to DBEDC residents to share about their campaign work
- c. Run a summer camp as a feeder system for youth leadership development

Measures

*Outputs*

- 6 Quarterly meetings between DBEDC residents and YF leaders
- 40 young people enrolled in the summer camp

*Outcomes*

- 200 of youth leaders developed and engaged
- 7 youth who participate in the leadership roles in the summer camp

***Goal #2: Increase public policy advocacy and engagement in civic affairs among residents in Dorchester Bay housing and the broader community that results in positive, localized neighborhood impact.***

Our work at DBEDC must be seen as part of a larger context in which we operate. While we can make important progress at addressing the challenges our community faces through real estate development – both housing and commercial, through small business lending and other economic development programs, and through leadership development and community building, we also recognize that there are systemic barriers to change that we alone cannot solve. As such, we are committed to increasing our focus on public policy advocacy across the

organization and in working in coalition with partners both in Dorchester and statewide who can help us advance causes that will have a measurable, positive impact on our community.

Moreover, we believe that a community that is engaged in civic affairs builds power, and thus our renewed focus on civic engagement encompasses work with our residents, those living in the broader community, small business owners, constituents of our other programs, and others in Dorchester.

### **Strategies and Measures**

#### **1. Develop the framework and the resources for a comprehensive and well-integrated civic engagement initiative.**

- a. Clearly define the initiative's function, intended outcomes, and how it will be incorporated in and coordinated across all of DBEDC.
- b. Identify staffing resources and partnerships to reach desired outcomes.
- c. Create a database to track and measure outcomes

#### **Measures**

- Program structure, intended outcomes, organizational resources and structure in place by end of FY18 Q2
- Database in place by end FY18 Q3

#### **2. Center organizing initiatives on expressed needs of residents and core to DBEDC's mission.**

- a. Analyze resident 1-1 conversations and house meetings to surface themes that can inform advocacy campaigns and other actions.
- b. Identify potential campaigns and meet with residents to test themes and finalize agenda.
- c. Engage residents in campaign design, recruitment of other residents, and campaign execution.
- d. Blend existing resident services activities and outreach with an expanded capacity for community and campaign organizing.
- e. Tie leadership development training program with civic engagement activities to provide meaningful avenues for action for emerging leaders.
- f. Connect adults and youth to organize on common issues

#### **Measures**

##### *Outputs*

- Quarterly analysis of 1-1 meetings and other input mechanisms.

##### *Outcomes*

- 35 residents engaging in campaign issue work per year (leadership/grassroots)
- 7 residents who engage in campaigns attend leadership training per year
- 20 youth and adults working together on common issues per year (juvenile justice/economic justice)

**3. Engage in specific campaigns on an annual basis that are core to DBEDC’s mission and provide an opportunity for DB to be a leader and catalyst for change.**

- a. Issues selected should meet the following criteria:
- Likely to result in positive, localized neighborhood impact
  - Likely to support other DB priorities (advancing economic self-sufficiency, addressing ‘cliff effect’ or gentrification, increase local economic opportunities, increasing safety, etc.)
  - Identified by local residents, attract residents to be engaged on the issue
  - Likely to be a vehicle for building resident leadership

Measures

*Outputs*

- 2 campaigns/community organizing initiatives launched in 3 years
- 7 DB members, residents, or community leaders participate in advocacy campaigns per year

*Outcomes*

- Increasingly impactful results from campaigns/community organizing initiatives

**4. Partner with local and statewide coalitions, networks, and advocacy organizations to advance issues that will have a positive impact on the neighborhood.**

- a. Map current groups that Dorchester Bay is interacting with and that cut across issues identified by residents (annual basis)
- b. Map other community assets
- c. Identify how to engage homeowners, businesses, and others in the community to work in partnership
- d. Connect residents to issues campaigns advocated for by others that might resonate with the needs of residents.

Measures

- Engage with 5 coalitions or partnerships on issue campaigns

**5. Continue to strengthen youth leadership and civic engagement through the Youth Force and the Youth Leadership Institute**

- a. Advance the Juvenile Justice campaign
- b. Connect the justice campaign with youth employment strategy

Measures

- Expungement reform bill
  - 100 co-sponsors
  - 100 supporters signed-on
  - 2 Editorial board endorsements
  - 4 Coalitions/allies supporting
- Raise The Age bill
  - 100 co-sponsors
  - 100 supporters signed-on

- 3 Editorial board endorsements
- 4 Coalitions/allies supporting
- Both bills go through a full vote by the end of 2018.

**6. Utilize DotThought programming to increase civic participation in advocacy and advance issues.**

- a. Organize an Advisory Group that engages new community leaders for DotThought to plan programs, carry out advocacy efforts, and other actions to advance issues.

Measures

*Outputs*

- 4 programs offered per year
- 100 attendees and repeat attendees (residents, other community leaders) per year
- Social media analytics per program
- At least 15% of the Advisory Group members are local residents

## Priority #3: Enhance Potential for Social and Economic Mobility for Residents

Critical to our mission and our vision is the commitment to supporting residents in the pursuit of their own dreams. Our goal is to help residents in our service area build their own economic power and promote social mobility so that they have more choices. We will support residents' ability to stay in the community with or without a housing subsidy through financial education, better employment, and pathways to homeownership.

### ***Goal #1: Increase economic self-sufficiency by building financial skills and assets.***

For adults and youth alike, a path towards economic self-sufficient starts with a strong foundation of financial knowledge and skills, coupled with a practical plan for using those skills to build assets. Financial goal-setting may be different for each person, and thus our intent is to work with community residents to help them identify what is most important to them, build needed skills, and implement steps to help them reach those goals.

### **Strategies and Measures**

#### **1. Research best practice models to develop Dorchester Bay's program.**

- a. Engage graduate student team or hire a consultant to conduct research on best practice models looking specially at how other CDCs implement financial skill and asset building programs; look at both programs for adults and youth
- b. Identify meaningful and measurable impacts, and identify mechanisms for collecting and analyzing outcome measures
- c. Identify potential partners for service-delivery
- d. Identify internal staffing and financial resources required to implement the program
- e. Draft a proposal for the program

#### **Measures**

##### *Outputs*

- Graduate student team or consultant hired by first quarter 2018
- Proposal submitted to the Board of Directors by the end of Q2 (June 2018)

#### **2. Launch a financial skill and asset building program for adults and for youth.**

Program components may include:

- a. Case management for intake, coaching, helping participants set meaningful financial and asset building goals, tracking progress and supporting continued progress
- b. Individualized goal-setting (credit repair, savings account growth, homeownership)
- c. Financial skill building workshops coupled with 1-1 coaching
- d. Technology skill and capacity building to bridge the digital divide (through TGH)
- e. Partnerships with agencies that provide services such as homebuyer counseling, IDA management, advanced technology skill training, Financial Self-Sufficiency programs tied to subsidized housing such as MBHP

#### **Measures**

##### *Outputs*

- Program launched by January 2019. Program launched with thoughtful metrics to measure how many programs and participants occur or are engaged each year.

- 9 TGH sessions
- 90 TGH participants
- 25% increase in home access to computing and the internet
- A TGH alumni network to help track outcomes and build community

#### *Outcomes*

- Change in financial literacy levels from baseline to post-course measures
- Bank accounts or IDAs opened and maintained, \$s saved, credit repair
- Advancement in technology skills and comfort level with computers
- Increased employment from technology skills
- Homebuyer purchases

### ***Goal #2: Increase economic self-sufficiency through livable wage jobs and sustainable employment.***

Dorchester Bay recognizes that a key to greater social and economic mobility is employment that provides a livable wage, is sustainable, and provides opportunities for personal and professional growth. We intend to take a multi-faceted approach to reaching this goal by working with job seekers, employers, and other agencies that provide critical support services to job seekers and employees to ensure success. We also intend to use our own projects, programs, and organizational structure to contribute to this goal by offering internships and employment opportunities, and by leveraging our real estate projects and small business lending programs to support increased economic opportunities for local residents.

#### **Strategies and Measures**

##### **1. Leverage DBEDC's real estate projects and resources to increase local employment.**

1.a. Meet or exceed standards set by the Roxbury Master Plan for hiring local, minority, and women-owned firms during construction of housing and commercial projects.

#### Measures

- Construction jobs: 51% Boston, 51% minorities; 15% women-workers
- All construction jobs hired through DBEDC projects pay minimum wage of at least \$18-\$20/hr
- Construction firms: 40% minority-owned, 10% women-owned
- When union subcontractors are used, set a floor for using local, minority and women apprentices.
- Use construction projects as a pipeline for on-the-job training for local, minority, and women tradespeople.

1.b. Permanent jobs created by commercial projects

#### Measures

- Permanent jobs created through commercial projects employ 50% local residents from Roxbury, Dorchester, or Mattapan (written into leases)
- 50% of jobs created for under-represented populations in those fields (e.g. minority, women, re-entry, LBGTQ, disability, etc.) – Need to discuss how to enforce and measure



1.c. Professionals hired by DBEDC during construction of housing and commercial projects.

Measures

- 30% of professionals hired for housing and commercial project development are minority-owned businesses (MBE) and 10% are women-owned businesses (WBE.)

1.d. Property management jobs through sub-contracts with firms that provide management to DBEDC's real estate portfolio.

Measures

- Meet or exceed MassHousing's stated goals that 28% of the companies hired by the property management firms under contract with DBEDC will be MBE, and 12% WBE. Targets will adjust upward if MassHousing goals increase.

1.e. Coordinate small business lending program with goals to increase local employment.

Measures

- 20% of 75 jobs created by small business lending borrowers employ local residents. Assess local employment possibilities as program develops and increase this goal if feasible.

1.f. DBEDC employment, internships, and other opportunities used to increase access to local residents, minority, women, and youth.

Measures

- 2 internships per year for local youth
- 5 shadowing or mentoring opportunities for local youth per year
- 25 jobs through Youth Force
- 15 jobs through summer camp annually
- All DBEDC employment opportunities for 16 year old+ pay minimum wage of at least \$15/hr

**2. Research best practice models to further develop a comprehensive approach for increasing employment.**

- a. Engage a graduate school team or consultant to conduct best practice research on job referral networks, employment programs, and similar at CDCs and other CBOs
- b. Explore program model(s) to serve client focus:
  - Fairmount corridor adult job seekers
  - Youth age 16-24
  - Re-entry population
- c. Obtain feedback from FJRN participants (job seekers, employers, partner agencies)
- d. Identify meaningful and measurable impacts; identify mechanisms for collecting and analyzing outcome measures
- e. Identify potential partners for service-delivery
- f. Identify internal staffing and financial resources required to implement the program
- g. Recommend where program fits within DBEDC organizational structure and relationship to Fairmount Job Referral Network
- h. Draft a proposal for the program

## Measures

### Outputs

- Graduate student team or consultant hired by Jan. 2018
- Proposal submitted to the Board of Directors by the end of Q2 (June 2018)

### **3. Launch comprehensive, re-designed employment program.**

Program components may include:

- a. Unified organizational and program approach to employment
- b. Stronger, larger Fairmount Job Referral Network
- c. Increased funding for job training targeted to employers/ industries in the Fairmount Corridor aligned with interest of local job seekers
- d. Stronger partnerships with certified job training programs
- e. Stronger partnerships with agencies providing wrap-around services, including child care

## Measures

- Program launched by the second quarter of 2019. Metrics to be considered through program design include:
  - # adults who participate in the program (s)
  - # of youth who participate in the program (s)
  - # of adults employed in jobs with X level of wages
  - # of re-entry population in jobs with X level of wages
  - Recidivism rate below X%
  - # of youth employed in jobs with X level of wages (or apprenticeships, internships, job shadowing)
  - # of adults who career advancement in X years

## **Priority #4: Ensure that DBEDC is a strong, nimble, and sustainable organization with the infrastructure and capacities to reach our vision.**

Dorchester Bay approaches this strategic plan in a healthy financial and organizational position. We know, however, that we have to keep building our organization and our capacity in order to reach our ambitious vision for the community. In this plan, we set goals for staff and board of director's development, strengthening our financial resources, increasing visibility, and supporting an effective outcome measurement system to be used for program and organizational improvement.

### **Goals, Strategies and Measures of Success**

***Goal #1: Develop and retain a diverse staff with the necessary professional capacities, create an inclusive culture, and foster cross-departmental initiatives.***

### **Strategies and Measures**

#### **1. Organize professional development opportunities for all staff.**

- a. Departments set training goals during the budget process.
- b. Plan one all-staff training with broad applicability each year.
  - Responsibility for planning and executing training rotates between staff to

- develop leadership and accountability.
- c. Include a personal and professional development plan as a component of the staff review process.
- d. Promote personal empowerment & responsibility by developing an expectation and openness for staff to ask for what they need for their own growth.

#### Measures

- Each employee participates in at least one professional development training that supports their success at DBEDC each year
- Full staff participation in training
- Positive training evaluations
- New leaders arise through planning exercise
- Personal and professional development plan written into review forms and monitored through annual and mid-year reports
- Annual staff survey reflects that staff feel like they can ask for what they need (and get support for their growth)
- Positive training evaluations

### **2. Focus efforts to increase diversity and inclusion.**

- a. Ongoing volunteer inclusion committee to discuss and address ongoing issues and focus efforts through a one-year work plan.
- b. Develop criteria for hiring process & candidate selection.
  - Create a target interview pool and don't start interviews until you have that pool.
  - Be clear about when we would deviate from our criteria.
  - Initiate a practice to have multiple staff review job descriptions for potential bias.
  - Use job referral network for postings.
- c. Clarify who we are - create a clear statement of who we are.

#### Measures

- Enough volunteers for committee to "get the work done"
- At least one all-staff activity per year to address issues that arise
- Written criteria for hiring developed by Q3 of 2018
- Written criteria for hiring implemented by the end of 2018

### **3. Support efforts for internal coordination.**

- a. Rotating presentations at DBEDC staff meetings to share activities from each department.
- b. Create an onboarding program for new employees to be held once every 6 months. Components to include:
  - Windshield tour of DBEDC properties
  - In-person orientation about who we are and what we do
  - Attendance at one youth force meeting
  - Attendance at one tenant meeting

- Attendance at practice group meetings
- c. Build greater awareness about ongoing activities in each practice area for entire staff.
  - Rotating presentations about what is going on in each practice area at monthly staff meetings
  - At least one cross-departmental initiative each year involving at least two different practice areas to improve group-to-group exposure and collaboration

#### Measures

- Staff report greater awareness of cross-departmental activities
- At least one new cross-departmental collaboration each year
- 100% participation of all new employees in onboarding activities during first year
- Participation by at least one employee from each practice group at each onboarding session
- Positive feedback about understanding what DBEDC does as a whole and DBEDC culture in annual staff survey
- Each practice group presents on their work in at least one staff meeting each calendar year
- Execution of at least one cross-departmental initiative each year
- Positive feedback about group-to-group collaboration in annual staff survey

***Goal #2: Ensure an engaged, informed, and active Board of Directors that offers strategic leadership and strives for excellence in governance.***

#### Strategies and Measures

**1. Establish Board structures and processes that insure robust and effective committees, meaningful orientation for new members and leadership development opportunities for members who wish to move into committee or board leadership.**

- a. Standing committees develop clear statements of purpose.
- b. Existing committee structure is reviewed in light of strategic plan to determine if more standing or ad hoc committees are needed and if so, these develop statements of purpose.
- c. A formal orientation program is developed that may include such practices as a “Board buddy” system, one-on-one meetings with senior staff, and a process for “checking in” with new Board members to develop personalized approaches to strengthen their engagement.

#### Measures

- Standing committee statements of purpose completed by March 2018
- Analysis of committee structure and new or ad hoc committees develop statements of purpose by June 2018
- Formalized orientation program completed by September 2018

**2. Expand Board representation to reflect the diversity of the Dorchester community, including business owners and neighborhood residents.**

- a. The nominating committee is strengthened by adding members and by working with the full board and staff to create a recruitment pipeline.

- b. A board self-assessment is conducted that brings to light current skills and strengths, aligns these with the strategic plan, and identifies gaps and opportunities to develop a framework for recruiting new members to strengthen board's capacity.

Measures

- Nominating committee strengthened by March 2018
- Board self-assessment conducted by June 2018

**3. Strengthen communication between Board and staff to ensure staff alignment with the Board's strategic vision and strategic plan.**

- a. Committee chairs and senior staff develop and/or refine dashboards and progress measurement tools so that the Board is continuously informed of progress toward strategic goals.
- b. Board meetings are restructured to include sufficient and specific time for strategic review as well as for regular business.

Measures

- Dashboards refined to inform the board by June 2018
- Board meetings restructured by March 2018

**4. Develop Board's capacity to rigorously review policies programs, finances and executive performance in the context of the strategic plan.**

- a. The Executive Committee creates a board learning program the responds to the recently completed Board development survey and to needs that emerge from the strategic plan.
- b. Develop a communication strategy that informs the Board regarding training opportunities from such sources as MACDC/Mel King Institute, Third Sector, industry and functional webinars) and make these systematic known to the Board. A pilot program to determine interest and effectiveness.

Measures

- Board learning program: 24-month program completed by June 2018; first program launched 2018
- Pilot program to determine interest developed by September 2018

**5. Establish mechanisms that keep the board abreast of key civic, community and public policy issues that are relevant to DBEDC' community standing and its strategies as well as key opportunities that inform the plan's implementation, modification and course correction.**

- a. Create a virtual "clipping service" for the Board from local newspapers, civic organization announcements, press releases from government and local organization and from philanthropic organizations.
- b. Establish an agenda of presentations at Board meetings by key officials in city and state government, by industry leaders, by other nonprofits including CDC's to introduce the Board to these leaders and to provide an opportunity to enrich the Board's thinking.

### Measures

- Pilot program re: “clipping service” to evaluate cost benefit by September 2018
- Agenda of presentations: 24-month agenda developed by March 2018; first meeting held no later than June 2018

***Goal #3: Strengthen DBEDC financially, with diverse revenue streams sufficient to meet the goals of the organization, a risk management system, and high quality asset management systems.***

### **3.a. Strengthen DBEDC financially through effective systems.**

#### **Strategies and Measures**

##### **1. Meet asset management performance standards.**

- a. Assess asset management software and continue collaboration with Nuestra re creating software potentially relevant to our portfolio
- b. Continue to assess applicability of other market rate software like MRI (Integratec)
- c. Continue training of asset management staff

### Measures

- Evaluation of possible software solutions complete by 1/30/19.
- Each staff member participates in one dedicated asset management training annually.

##### **2. Institute an organizational (enterprise) risk management system.**

- a. Develop RFP for risk management consulting services
- b. Select consultant to perform organizational risk assessment
- c. Consultant’s report delivered
- d. Priority recommendations implemented

### Measures

- Complete and issue RFP by 12/31/17
- Consultant selected by 2/1/18
- Report delivered by 3/30/18
- Priority recommendations implemented by 6/30/18

##### **3. Assess adequacy of financial and accounting tools currently in use.**

- a. Meet with accounting staff and AAF to discuss adequacy of tools currently in use
- b. AAF completes review of tools used by peer CDCs
- c. Evaluation of competitive products/systems
- d. Recommendation re new systems or maintain current systems

### Measures

- Discussion complete 12/31/17
- Review completed by 2/1/18
- Evaluation complete by 3/31/18
- Recommendation complete by 4/15/18

**3.b. Ensure DBEDC can meet the revenue demands of the plan, diversifying revenue streams and funding sources.**

**Strategies and Measures**

**1. Establish a board and staff fundraising committee charged with creating an infrastructure and plan for sustainable resource development.**

Measure

- Board and Staff fundraising committee formed by December 2017

**2. Conduct baseline analysis of current external funding sources.**

- a. Differentiate grants and contracts, public, private and individual sources, and other measures helpful to gaining insight into current practice.

Measure

- Baseline analysis completed by December 2017

**3. Develop an informative dashboard tool to report fund development progress to board.**

Measure

- Dashboard designed, tested, and piloted by March 2018, dashboard populated for board review on a quarterly schedule

**4. Review strategic plan in context of resource implications.**

- a. Develop framing questions that will lead to board clarity around the balance between maintaining existing initiatives and approving new initiatives.

Measure

- Funding priorities clarified, reviewed and approved by Board March through June 2018, possibly on-going

**5. Based upon baseline analysis and strategic plan review, develop comprehensive fundraising plan that covers 2018 and, as appropriate extends through the course of the strategic plan with specific targets, tasks and benchmarks.**

- a. Plan will include strategies for raising both restricted and unrestricted funds from private sources – individuals, foundations, and corporations.
- b. Plan will incorporate public sources as possible, recognizing that these may provide time-limited and restricted resources.

Measure

- Plan completed March 2018, with timelines and benchmarks extending through 2020

**6. Create an annual fundraising calendar that identifies special events, cultivation/stewardship activities, and other milestones as identified in the fundraising plan.**

Measure

- Fundraising calendar is ongoing

**7. Put policies and practices in place to demonstrate the organization’s professionalism with respect to fund development.**

- a. Among these a formal gift acceptance policy, a privacy policy, a practice of the Board President signing gift acknowledgement letters, data management, and other best practices of the industry.

Measure

- New policies and practices in place beginning June 2018, and ongoing implementation of best practices

***Goal #4: Raise the visibility and profile of DBEDC in the community and with stakeholders through effective outreach and communication.***

**Strategies and Measures**

**1. Agree on a definition of “community builder” as that term is used in the strategic plan.**

- a. Draft possible definition(s) and test with board and staff; based on feedback, adjust definition and articulate final version.
- b. Assess whether DBEDC brand is aligned with the concept of “community builder”.

Measures

- Draft definition by end of February 2018
- Engage branding consultant by January 15, 2018; Consultant’s report by March 30, 2018

**2. Increase community outreach in Dorchester and within a broader group of stakeholders.**

- a. Develop outreach strategy, targeting specific stakeholder groups, that communicates new aspects of DBEDC’s emerging brand and organizational activities.
- b. Continue existing social media and programmatic platforms event; implement outreach strategy and adjust events and usage of social media and other communication vehicles to reflect new outreach strategy.

Measures

- Develop outreach strategy by May 1, 2018
- Continue social media and events ongoing; from May 1, 2018

***Goal #5: Strengthen systems for effective outcome measurement including technology, staff skills, and the capacity for data collection, analysis, and reflection to support program and organizational improvements.***

**Strategies and Measures**

**1. Translate the strategic plan into an actionable implementation plan tied to outcome measurements, and regularly analyze and reflect on data to improve our work.**

- a. Inventory data collection and tracking tools/systems currently in use within DBEDC
- b. Evaluation (by DBEDC users) of tools currently in use, i.e., are tools suitable for current assigned tasks and anticipated future tasks.
- c. Identify/recommend opportunities for consolidating or inter-operability of tools/systems



Measures

- Inventory completed by 12/31/17
- Evaluation completed by 2/28/18
- Recommendations completed 4/1/18

**2. Make recommendations re: system enhancements, including databases, to support effective outcome measurement, data collection, reporting, and analysis.**

- a. Recommend re system enhancements, including databases, to support effective outcome measurement, data collection, reporting and analysis [based on 1(a), supra]

Measure

- System recommendations by June 1, 2018

**3. Create and/or implement internal systems changes to improve data collection and tracking.**

Measure

- Systems implemented by December 31, 2018

## Section V: Implementation and Evaluation Plans

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### Implementation Plan

The Fiscal Year 2018 Implementation Plan will include the following components:

- A prioritized list of strategies to be deployed in the first year to reach the goals
- Major action steps to be carried out under each strategy
- Specific measures of success for the first year fleshed out in Q1 2018
- Responsibilities and roles of staff, board members, partners, or others who will be key players in implementing the strategies and action steps
- Resources required for implementation with links to the FY18 budget
- Target date and timeline for implementing the strategies and action steps

### Evaluation Process

DBEDC will develop a method and structure for evaluating the results of the plan. The evaluation system will have the following components:

- Agreed upon measures to be evaluated
- Infrastructure (software and staffing) needed to collect, report, and analyze measures
- Dashboard indicator report, narrative report, or other report formats
- Reporting timeframe and process including review and analysis by the staff and the board

For each of the subsequent fiscal years, DBEDC will have an implementation plan prepared and finalized in December.

## Appendix

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### Real Estate Project Selection Criteria: HOUSING

DBEDC's pipeline development strategy will follow project selection criteria focused on consistency with DBEDC's overall mission, service area and stakeholders. DBEDC's housing development is motivated by our core mission to increase housing supply for low-income members of our community. Pursuing projects that serve households at or below 60% of area median income (AMI), and especially those at 30% of AMI or below, who have the fewest options, is the foundation of our real estate practice. All projects should be planned to create construction jobs for local, minority and female construction workers.

When a new project is initiated, DBEDC real estate will prepare a project charter that outlines how the project measures up against the following criteria. The project charter will also address risks.

#### Mission Match

Any new housing project should help us further our goal of creating opportunities in our service area by meeting at least 3 of these mission-based criteria:

- a. Create or preserve affordable rental housing (60% AMI or below)
- b. Create or preserve affordable homeownership (60% AMI or below)
- c. Create mixed/middle income rental housing (include households over 60% AMI)
- d. Create mixed/middle income homeownership (include households over 60% AMI)
- e. Projects that would not be doable "but for DBEDC"
- f. Projects with a critical neighborhood impact, such as revitalization, addressing blight, or taking part in a larger mixed-use development
- g. Partnership opportunity to leverage greater impact in our service area
- h. Meets local need to house a special population

#### Location

Most new housing projects should be in DBEDC's service area. If a proposed project is in our service area, it should meet one additional location criteria below:

- a. Upham's Corner
- b. Quincy Corridor
- c. Transit-oriented (within ¼ mile of a rail stop or at least 3 bus lines)
- d. Located near existing DBEDC properties (for operational efficiencies)
- e. Part of a larger planning process
- f. Unique development location for a high mission impact

If the project is not in our service area, it should meet at least two, and ideally three, of the criteria listed as "c" through "f" above.

#### Stakeholder Priority

Any new housing project should align with at least one key stakeholder priority or area of

concern. Stakeholders include:

- a. City of Boston
- b. Commonwealth of Massachusetts
- c. Local neighborhood
- d. Community partner (UCMS, UCHS, DSNI, etc.)

### **Addressing Risk**

The following risks should be addressed in the project charter:

- a. Cash flow potential
- b. Impact on our opportunity to pursue other worthy goals
  - i. Staff capacity within real estate
  - ii. Staff capacity across the organization
- c. Project timeline
- d. Ratio of project fee to demands on staff and infrastructure
- e. Carrying costs
- f. Resources that may need to be redirected from other opportunities
- g. Project financing
  - i. Predevelopment sources
  - ii. Public and Private funding availability
  - iii. Projects ability to finance itself and not rely on other sources
  - iv. Competition for funding with other DBEDC projects

## Real Estate Project Selection Criteria: COMMERCIAL

Follow project selection criteria focused on strategic locations and tenant selection that meet community needs expressed in planning processes. All projects should be planned to create construction jobs for local, minority and female construction workers. When a new project is initiated, DBEDC real estate will prepare a project charter that outlines how the project measures up against the following criteria. The project charter will also address risks.

### Location

Most new commercial projects should be in DBEDC's service area. If a proposed project is in our service area, it should meet at least one of criteria listed below:

- a. Upham's Corner
- b. Quincy Corridor
- c. Transit-oriented (within ¼ mile of a rail stop or at least 3 bus lines)
- d. Main street
- e. Part of a larger planning process
- f. Unique development opportunity for a high mission impact

Recognizing DBEDC's unique role as a community-based commercial developer, some projects will not be in our service area. If the project is not in our service area, it should meet at least two, and ideally three of criteria "c" through "f" above.

### Tenants

Any new commercial tenant should meet at least 3 tenant criteria:

- a. Local jobs (Commitment to make best faith effort of 50% local hiring)
- b. Meets community or neighborhood need identified in planning process
- c. Offers complementary services or tenants to boost local economic development
- d. Quality jobs (\$15/hr or more)
- e. Minority/ women enterprises
- f. Incubator

All new projects and tenants should be economically sustainable.

### Addressing Risk

The following risks should be evaluated and planned for when evaluating a new potential commercial project:

- a. Cash flow potential
- b. Impact on our opportunity to pursue other worthy goals
  - i. Staff capacity within real estate
  - ii. Staff capacity across the organization
- c. Project timeline
- d. Ratio of project fee to demands on staff and infrastructure
- e. Carrying costs
- f. Resources that may need to be redirected from other opportunities
- g. Pre-leasing ability

- h. Project financing
  - i. Predevelopment sources
  - ii. Public and Private funding availability
  - iii. Projects ability to finance itself and not rely on other sources
  - iv. Competition for funding with other DBEDC projects

## Small Business Borrower Selection Criteria

- Mission-aligned
- Business cannot get bank financing
- Serves one of 6 communities
- Credit score eligible
- Other criteria

## Strategic Planning Participants and Stakeholders

### Strategic Planning Committee

#### Board Members:

- Christine Green
- Elrette Marion
- Leighton Richardson
- Max Shapiro
- Daryl Wright
- Mary Walker

#### Staff Members:

- Jessica Boatright
- Dan Gelbtuch
- Perry Newman
- Mary Wambui

#### Consultant:

- Diane Gordon

### Stakeholder Interviewees

- Liora Beer, Fairmount Innovation Lab
- Kevin Bynoe, Senior Portfolio Manager, United Housing Management
- Hector Cruz, Regional Vice President, Winn Management
- Sheila Dillon, Chief of Housing and Director of Neighborhood Development, City of Boston
- Joe Flatley, President and CEO, MHIC
- Phil Hillman
- Joe Kriesberg, President and CEO, MACDC
- Juan Leyton, Executive Director, Dudley Street Neighborhood Initiative
- Bob Nelson, State Director, Small Business Administration
- Kate Racer, Associate Director, Dept. Housing and Community Development, Commonwealth of MA
- Jim Regis, VP Regional Manager, Maloney Properties
- Mat Thall, Development Consultant
- Joan Tighe, Fairmount CDC Collaborative
- Bob Van Meter, Executive Director, Boston LISC
- Prentice Zinn, Miller Foundation

### Resident Focus Group Attendees

- Nixa Aponte
- Juan Cabrera
- Jacqueline Corua
- Rosalyn Dennis
- Adela Esparza



- Adela Esparza Rojas
- Margarita Figueroa
- Herminia Halmonte
- Damaris Hernandez
- Maria Juaguina Carasco
- Eileen Kenner
- Lesbia Lacen
- Adriana Lopes
- Carmen Marcial
- Cardita Martinez
- Ester Martinez
- Irene Mongo
- Lillian Montes
- Jonathan Rios
- Maria Rios
- Alida Taveras
- Francia Taveras
- Iris Zayas

### **June 17<sup>th</sup> Retreat Attendees**

#### **Board Members:**

- Maria Andrade
- Paul Black
- Evelyn Darling
- Ayoka Drake
- Christine Green
- Eileen Kenner
- Elrette Marion
- Beth O'Donnell
- Leighton Richardson
- Max Shapiro
- Mary Walker
- Brian Welch
- Daryl Wright

#### **Staff Members:**

- Jessica Boatright
- Johnny Charles
- Breyana Ellis
- Meg Flanigan
- Mona Fuller
- Dan Gelbtuch
- Ricky Guerra

- Kim Lyle
- John Mahony
- Jim McSherry
- Linda Mello
- Elias Monteiro
- Perry Newman
- Helena Pimental
- Vin Pina
- Dychell Reeves
- Bill Riordan
- Denise Roman
- Beto Rosa
- Cookie Sheers
- Mary Wambui
- Andy Waxman
- Leah Whiteside
- Angela Yarde

### **Workgroup Participants**

#### Board Members:

- Christine Green
- Elrette Marion
- Beth O'Donnell
- Leighton Richardson
- Max Shapiro
- Mary Walker
- Daryl Wright

#### Staff Members:

- Jessica Boatright
- Keturah Brewster
- Johnny Charles
- Breyana Ellis
- Jaissa Feliz
- Meg Flanigan
- Dara Frederick
- Dan Gelbtuch
- Ricky Guerra
- Auston Harris
- Kim Lyle
- John Mahony
- Jim McSherry
- Elias Monteiro

- Perry Newman
- Helena Pimental
- Dychell Reeves
- Dalida Rocha
- Denise Roman
- Beto Rosa
- Cookie Sheers
- Mary Wambui
- Andy Waxman
- Leah Whiteside

### **October 28<sup>th</sup> Retreat Attendees**

#### **Board Members**

- Maria Andrade
- Evelyn Darling
- Ayoka Drake
- Christine Green
- Phil Hillman
- Rosalyn Johnson
- Eileen Kenner
- Elrette Marion
- Beth O'Donnell
- Leighton Richardson
- Max Shapiro
- Mary Walker
- Brian Welch
- Daryl Wright

#### **Staff Members**

- Andy Waxman
- Angela Yarde
- Bill Riordan
- Brenda Guerra
- Chuck McVea
- Clovis Turner
- Cookie Sheers
- Dalida Rocha
- Dan Gelbtuch
- Dara Frederick
- Dychell Reeves
- Elias Monteiro
- Ricky Guerra

- Helena Pimentel
- Jaissa Feliz
- Jessica Boatright
- Jim McSherry
- John Mahony
- Johnny Charles
- Kim Lyle
- Leah Whiteside
- Linda Mello
- Meg Flanigan
- Mona Fuller
- Perry Newman
- Scott Morrison
- Vin Pina