Commonwealth Housing Task Force  
Summary of Progress as of December 31, 2014

Note: in order to reduce the size of these reports, we have condensed the description of regular ongoing activities, have moved much of the Chapter 40R update to Appendix I of this report and have simplified the presentation. For background, please visit www.commonwealthhousingtaskforce.org and click on “Quarterly Updates”. A key to the Appendices and the Appendices themselves follow at the end of this Quarter’s report.

During the fourth Quarter of 2014, the Commonwealth Housing Task Force and its committees focused their efforts on a wide range of issues relating to housing production, assistance and policy as detailed in the remainder of this report.

Barry Bluestone, Eleanor White, and Ted Carman, working through the Dukakis Center for Urban and Regional Policy at Northeastern University, have carried out the staff work in coordination with active committees and Boston Foundation staff.

The Political Season

As we close out the fourth quarter of 2014, we also look forward to the inauguration of a new Governor and Lt. Governor (Charlie Baker and Karyn Polito), a new Attorney General (Maura Healey), a new Treasurer (Deb Goldberg), and new faces in the Massachusetts House of Representatives and Senate. We anticipate working closely with all of them.

As this report goes to press, we are excited to learn of Governor-elect Baker’s selections of Jay Ash, City Manager of Chelsea, MA as the new Secretary of Housing and Economic Development; of Steve Kadish, most recently COO of Northeastern University, as his Chief of Staff; and of Mary Lou Sudders, former Commissioner of the Department of Mental Health and recently President of the MA Society for the Prevention of Cruelty to Children. All have had distinguished careers in the public sector and will be important to the implementation of programs and issues championed by the Commonwealth Housing Task Force. We have also learned that Aaron Gornstein, UnderSecretary of the Department of Housing and Community Development will be stepping down, and have just learned that Chrystal Kornegay, Executive Director of Urban Edge CDC and current President of the CHAPA Board has been selected by the Governor-elect to fill this position. The UnderSecretary is the administration official who works most closely with CHTF. We’re thrilled that Chrystal has accepted this position; she also has had a distinguished and successful career working with programs of affordable housing, and will be a major asset to the new administration. We thank Aaron for his extraordinary tenure in this position.

Many more State administration personnel decisions will be announced shortly, some of which may be in effect by the time this Report is distributed to CHTF membership.
Special Housing Report Card to be Issued

Barry Bluestone has spent a great deal of effort during the past two Quarters in the development of the Special Edition Greater Boston Housing Report Card. This special edition was prepared in order to provide a set of housing issues that can be highlighted during the arrival of the new Baker administration and into the second year of the Walsh administration at the City of Boston. The Report could form the basis for CHTF advocacy through the transition to a new governor’s administration and with the City of Boston during the upcoming year. We anticipate that the report will be released in February, 2015.

Watch your email inboxes for information about this report and for information about its release in the coming weeks.

Housing Market Updates

Press coverage during this period about news in the housing market has continued the drumbeat of good news/bad news that we noted last Quarter, with many stories about the surge in home prices and rents, and the increasing lack of affordability in both sectors. Sellers and landlords are celebrating at the good news for their financial bottom lines, while homebuyers and renters are struggling to find suitable housing that they can afford.

Banker and Tradesman highlighted this issue in a thoughtful piece about the housing market in Cambridge on October 12, 2014. And The Boston Globe ran a long story on November 28, 2014 about the extreme level of competition for housing subsidies in the Boston metropolitan area. See full articles in Appendix II of this report.

The overall situation of a recovering housing market with increasing demand and resulting increasing prices in both the single-family and multifamily sectors, combined with new administrations at the city and state level, makes the work of the Commonwealth Housing Task Force even more important for 2015.

For those particularly interested in statistics about housing, check out the initial results from the American Housing Survey of 2013. A brief report about it (and links to detailed information) presented by the National Low Income Housing Coalition in October, 2014 can be found in Appendix II of this report.

Graduate Students and Young Professionals: Housing for the Millennials

Barry Bluestone continues to pursue efforts to deal with the issues in the housing market presented by Boston’s being such a renowned center of higher education, with students living in housing in the region’s neighborhoods putting intense pressure on the housing market for working families and the elderly. Please refer to previous editions of CHTF Quarterly Reports for a detailed discussion of our efforts to encourage the production of “Millennial Housing”. Work on this concept is proceeding, and it will be discussed in the Special Housing Report Card mentioned above.
An article in *The Boston Globe* of December 1, 2014 puts this issue in perspective: Boston has the largest percentage of young people of any American city. Millennials bring vitality to the metropolitan area, but are often struggling economically to be able to live here. Making it possible for this generation to remain in Boston and thrive will be an ongoing challenge for the foreseeable future. The full article can be found in Appendix III of this report.

Mayor *Marty Walsh* of the City of Boston seems to be very serious about making student and Millennial housing one of the priorities of his housing efforts, as covered by *The Boston Globe* on October 9, 2014. Paul McMorrow has interesting commentary on this plan in the *Globe* of October 21, 2014. To the extent that college students can be housed on-campus, pressure will be relieved in middle-income neighborhoods in Boston, preserving housing opportunities both for Millennials and for working families. Both articles can be found in Appendix III of this report. We look forward to progress on this issue in the coming months.

**Other Programmatic Developments**

We have also written in past reports that Boston Mayor *Marty Walsh* has been clear in his statements about wanting to facilitate the development of more housing, especially for working families, in the City of Boston. He has now announced an ambitious goal of facilitating the provision of 53,000 more housing units in Boston by 2030. A comprehensive presentation of Mayor Walsh’s plan can be found in a *Boston Globe* article of October 9, 2014, as well as an analysis of the plan by *Banker and Tradesman* (Scott Voorhis) on October 19, 2014, and cautionary pieces by Larry Harmon in *The Boston Globe* on October 11, 2014 and Colleen Sullivan in *Banker and Tradesman* on October 21, 2014, all found in Appendix III of this report. We very much appreciate the Mayor’s attention to this issue, which is critical to the continued vitality and economic growth of Boston. It will be interesting to see the steps that Mayor Walsh takes to assure that this ambitious housing goal can in fact be achieved in the face of serious challenges, both technical and political, to new production in the city, and CHTF looks forward to working with his administration.

A working group convened by the Metropolitan Area Planning Council (MAPC) is focusing on ways to reduce the cost of producing middle-income housing. *Eleanor White* is representing CHTF in these discussions.

As mentioned in the last CHTF Report, *Eleanor White* has had a number of discussions and meetings with practitioners in the health care and housing worlds about the connections between housing quality and health. *ShelterForce* magazine published a thoughtful piece on the challenges and potential benefits of housing and health care practitioners establishing a dialogue. This topic is receiving increased attention by advocacy groups such as CHAPA and NeighborWorks, and CHTF is happy to play a role. This piece can be found in Appendix III of this report.
And after many years of struggle to enact comprehensive statewide zoning reform, the issue may indeed be coming back up in the legislature. Pieces in *Banker and Tradesman* by Scott Voorhis (on October 26, 2014) and Steve Adams (on November 17, 2014) go a long way toward demystifying this incredibly complicated set of issues and should be mandatory reading for anyone hoping to understand the legislative debate that will ensue in the coming months. Both pieces can be found in Appendix III of this report.

An exciting new programmatic initiative was announced by MassDevelopment in December, 2014. The **Transformative Development Initiative** will provide technical assistance and financial resources to 10 Gateway Cities in Massachusetts to facilitate planning and development activities. An article about this in *Banker and Tradesman* of December 15, 2014 can be found in Appendix III of this Report.

Implementing Smart Growth Zoning: Continuing Interest from Municipalities and Local Groups

Chapters 40R and 40S have now both been on the books since 2005 and implemented since 2006. The programs have resulted in the passage of 35 Chapter 40R smart growth zoning districts in 32 municipalities, totaling approximately 12,744 zoned units supported by their communities, with continuing interest in many more. Three communities, Ludlow, Norwood, and Swampscott, with zoning allowing for over 400 as-of-right housing units, have recently passed 40R Districts. Two of the three, Ludlow and Norwood, have received DHCD’s Final Approval. Swampscott must go back to Town Meeting this fall to make several amendments, but the District is expected to receive Final Approval by the end of this year or in early 2015. Please refer to Appendix I to this report for the regular detailed update on progress under the Chapter 40R program.

Thanks to the Economic Development and Jobs bill that was passed by the Legislature and signed into law by the Governor in July, 2012, the Smart Growth Housing Trust Fund was replenished with a deposit of $4,000,000; with projects moving forward in a number of existing Districts and corresponding requests for Density Bonus Payments, just under $2 million of this money is uncommitted.

It will be important to obtain additional resources for the Smart Growth Housing Trust Fund in the next budget cycle in 2015. DHCD currently estimates that the Trust Fund will likely have sufficient resources to cover required payments through FY15. The funding needed to make payments under Chapter 40S for school costs has been coming from the Education Budget, and therefore does not represent draws from the Trust Fund. Communities are now moving forward with proposals for Chapter 40R with reasonable assurance that the funds will be available to make payments as promised by the legislation. In addition, replenishing the Trust Fund has made it easier for DHCD and others to actively promote the program in their outreach and education efforts.
CHTF has implemented efforts to make developers more aware of the significant benefits represented by this substantial amount of land zoned as-of-right for mixed-income housing and related mixed-use development, and additional ideas about how best to achieve this goal of heightened awareness within the development community would be much-appreciated. Please forward your comments and ideas to Eleanor White at ewhite@housingpartnersinc.com.

With regard to the State Historic Tax Credit program, the Economic Development bill signed in August, 2014, included a mechanism that allows State Historic Tax Credits that have been allocated to a building to be transferred to a new owner of that building prior to the commencement of construction. This has been a nagging problem in certain situations, and the legislative correction will be very helpful.

Unfortunately, however, the Economic Development bill did not address the following areas that remain important objectives for future action:

- Increasing the annual amount of authorization for the Credit above the current $50,000,000;
- Requiring that when the Secretary of State makes an allocation to a project, the allocation must be for the full amount authorized by the legislation (that is, an allocation equal to 20% times the eligible renovation costs);
- Providing a mechanism to allow additional flexibility for the Secretary of State to apply the historic renovation standards to specific circumstances.

The requirement to fully fund developments that are approved would eliminate the difficulty that developers face when they are allocated small amounts of credit in successive funding rounds, of which there are three per year. This often means that the full funding is not available for some period of years, making it extremely difficult to retain site control over the properties and to pull together the full complement of needed financing sources. A previous hearing on House 311 was held at which strong support for the provisions in the Bill was expressed by a wide variety of groups.

As stated many times before, CHTF feels strongly that the Legislature should repeal the “clawback” provision in Chapter 40R, which states that communities have three years after the issuance of a Zoning Incentive Payment for a Chapter 40R Smart Growth Zoning District to issue building permits and have construction commence, regardless of market circumstances. Refer to previous issues of these reports for a full discussion of this issue. To resolve this, we are working with Senator Chandler to assist her in refiling her bill from the last session (Senate 591) which would repeal the “clawback” provision. We are very grateful to Senator Chandler for her past support on this bill and for her unwavering support of Chapter 40R.

A continuing issue is the scarcity of local resources to plan smart growth districts, and this scarcity up until now has been one of the reasons for fewer new proposed districts than we would like to see. So again we thank the Patrick Administration for its announcement in early 2014 of an infusion of planning grant funding for projects—
like Chapter 40R districts—that would advance the Governor’s goal for construction of 10,000 multifamily housing units across the Commonwealth. Since the first of the year, approximately $130,000 has been committed for planning for housing, including consideration of 40R Districts, under the Priority Development Fund (PDF) program. Of this amount all but $17,000 has been allocated.

DHCD is now shifting activities formerly funded under the PDF program to a new program called PATH (Planning Assistance Toward Housing). The program is active, with applications available on the DHCD website. It is similar to PDF. The initial amount available was a total of $600,000 for eligible applicants and projects. To date, awards have been made to Quincy ($10,000), Northampton ($25,000), and Dunstable ($10,000). Dracut has submitted an application for $25,000 which is under review. The maximum size of individual awards is $25,000.

Officials from DHCD are also doing outreach to communities for both 40R and PATH, with a meeting scheduled on January 23, 2015 in Carlisle with 12 or so active members from the communities of Dunstable, Westford, Acton, Carlisle, Boxborough, Groton, Stow, Sudbury, Littleton, Medway, Mendon, Easton, and others. DHCD will also participate in a housing panel at the Mass. Municipal Association conference on January 24, 2015, and at a to-be-determined time will meet with a subcommittee of the Massachusetts Association of Civil Engineers. CHTF applauds these efforts.

The Compact Neighborhoods program provides incentives to communities that have or create districts that allow as-of-right developments of at least 4 units per acre for single family homes, and 8 units per acre for multifamily development (structures with two or more units). The incentives include priority for certain State discretionary funding as well as potential relief from the requirements of Chapter 40B. We believe that the Compact Neighborhood program offers another welcome alternative for communities that wish to encourage the development of new housing.

Implementation of Chapter 40R and 40S (the School Cost “Insurance Policy”),
Funding for both Chapters 40R and 40S, and a Technical Amendment to 40R

Specific details about the Chapter 40S program and its rules can be accessed in previous CHTF Quarterly Reports. The final state budget for FY14 made available $500,000 to cover Chapter 40S reimbursements as required by the Chapter 40S statute. Any of that funding not required for 40S payments in FY15 will revert to the Commonwealth’s General Fund.

For FY14, to be received in FY15, at least one community is expected to receive funds under Chapter 40S: Lakeville ($253,000). The fact that this project is eligible for the payments is evidence that in some limited situations communities need the financial assistance Chapter 40S was designed to provide. Chapter 40S payments are made when the cost of educating the children in new developments in Chapter 40R districts exceeds the sum of (approximately) one half of the property and excise taxes paid by new development in the 40R District, plus the incremental new Chapter 70 money that is
allocated to the community because of the increase in the school population. Conversely, the fact that only one community needs 40S assistance is evidence that additional multifamily housing construction has little adverse impact on local school costs, thus making Chapter 40S an effective “insurance policy” with little cost to the Commonwealth.

The map below, provided by the MA Department of Housing and Community Development (DHCD), indicates the communities that have already implemented Chapter 40R and those in the process of doing so. The table following the map outlines the current funding sources and obligations for Chapter 40R.

Note: Current through December 17, 2014. Source: DHCD

Communities thought to be currently considering new Chapter 40R districts include, Bridgewater, Barnstable, Marshfield, South Hadley, Tyngsborough, Southampton, Easthampton, Dennis, Malden, Newburyport, Scituate, South Hadley, and a second project in Haverhill, in the Bradford section. In addition, two towns in Berkshire County –Adams and Great Barrington– are considering 40R Districts under the leadership of the Berkshire County Regional Planning Commission. Permitting for specific developments and construction activity is underway in Amesbury, Brockton, Fitchburg, Holyoke, Lowell, Easthampton, Easton, Natick, Sharon, and Norwood. And Pittsfield, Reading, Brockton, Lawrence and Lakeville have recently completed projects.
The following chart shows the current status of the Smart Growth Housing Trust Fund. It reflects the additional $4,000,000 that was passed in the Economic Development and Jobs Bill in 2012. The $4,000,000 consists of amounts in excess of $10,000,000 that are actually received from State settlements or judgments.

<table>
<thead>
<tr>
<th>Source Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Funds from sale of Surplus State Land</td>
<td>$3,349,370</td>
</tr>
<tr>
<td>Appropriations – Transfers, October, 2007</td>
<td>$10,000,000</td>
</tr>
<tr>
<td>Sales of Surplus State Property, 2007</td>
<td>$78,000</td>
</tr>
<tr>
<td>Sales of Surplus State Property, 2008</td>
<td>$7,772,440</td>
</tr>
<tr>
<td>Sales of Surplus State Property, 2009</td>
<td>$12,000,000</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>$165,440</td>
</tr>
<tr>
<td>Deposit pursuant to 2012 Jobs Bill</td>
<td>$4,000,000</td>
</tr>
<tr>
<td>Total Sources of Funds</td>
<td>$37,365,250</td>
</tr>
<tr>
<td>Less Transfer to General Fund, 2009</td>
<td>($18,004,810)</td>
</tr>
<tr>
<td>Other Sources</td>
<td>$51,000</td>
</tr>
<tr>
<td>Net Sources</td>
<td>$19,411,440</td>
</tr>
<tr>
<td>Less Payments and Obligations to Communities to date:</td>
<td>($17,468,000)</td>
</tr>
<tr>
<td>Balance in Fund as of December, 2013</td>
<td>$1,943,440</td>
</tr>
</tbody>
</table>

As described earlier in this Report and shown in the table above, the Smart Growth Housing Trust Fund is now expected to have sufficient resources to make the payments that will become due to communities through the remainder of Fiscal year 2015. (The Trust Fund provides the funding for the Zoning Incentive Payments and the Density Bonus Payments for Chapter 40R.) These additional funds will be required as more districts are passed and as more specific properties begin construction.

To date, 19 communities have permitted/started or completed construction on housing within 20 of the 35 approved 40R Districts, comprising 2449 Units. We are extremely pleased that over half of the approved Chapter 40R districts have reached this important milestone. This has resulted in Density Bonus Payments to communities of $6,147,000. However, as mentioned above, CHTF will be working to increase awareness of the benefits of 40R within the development community.

We are working with Senator Harriette Chandler and Representative Kevin Honan to have them refile previous legislation to provide for a continuing and reliable source of funding of the Smart Growth Housing Trust Fund, as discussed in detail in previous Quarterly Reports. The former Senate bill was Senate 67. The House bill was House 170. We are very grateful to Rep. Honan and Sen. Chandler for their strong and continuing leadership on this legislative effort and to both for their support from the beginning for Chapter 40R. Despite the success in obtaining funds for the current fiscal year for the Smart Growth Housing Trust Fund, there remains ongoing uncertainty because of the lack of a consistent, predictable revenue source. It is therefore important that we not lose sight of this bill, and that efforts continue to have it passed in the next session of the Legislature. Refer also to the previous section for a detailed discussion of...
the bill filed by Senator Harriette Chandler to repeal the “clawback” provision of Chapter 40R.

Spreading the Word about Chapter 40R, Smart Growth, and Millennial Housing

Barry Bluestone, Eleanor White, Ted Carman, Mary Jo Meisner, DHCD staff, and other members of CHTF continue to respond to requests for meetings, discussions, and presentation of material about Chapter 40R from planning officials, local elected officials, journalists, affordable housing advocates, realtors and others to assure widespread education about the benefits of Chapter 40R.

Please visit the Boston Foundation/CHTF websites, www.tbf.org/chtf or www.commonwealthhousingtaskforce.org and consult previous Quarterly Reports for a detailed description of this ongoing activity.

We encourage you to regularly visit the CHTF website, and we welcome all comments and suggestions for improvement. The website can be accessed directly at www.commonwealthhousingtaskforce.org. The website serves as the central repository for documents, status reports and resource material on the Task Force itself, Chapter 40R, Chapter 40S, press coverage, and related matters. Dukakis Center staff, led by Barry Bluestone, is responsible along with Tim Gassert at the Boston Foundation for updating the CHTF website on a regular basis. We also encourage you to visit the new and improved Boston Foundation website at www.tbf.org.

Funding and Legislation for Affordability

State Housing Budget Cuts

To close a $329 million budget shortfall, Governor Deval Patrick used his 9C authority this quarter to immediately cut $198 million from the state budget. Because the Governor’s 9C authority is limited to spending within executive branch agencies, he is seeking legislative approval to make cuts to areas such as local aid. In addition, the Governor received commitments from several quasi-public agencies to return a portion of state dollars to the Commonwealth. Although the following housing items were reduced, the Department of Housing and Community Development expects to carry out FY15 plans and commitments. More funding will be needed in FY16 to support and expand these programs that make it possible for households with low incomes to afford housing.

- The Massachusetts Rental Voucher Program (7004-9024) was reduced by $786,636, bringing total FY15 funding after the reduction to $75.6 million.
- The DMH Rental Subsidy Program (7004-9033) was reduced by $76,875, bringing total FY15 funding after the reduction to $5 million.

Other housing-related programs will also be impacted by the budget shortfall. MassDevelopment has been asked to forego $29 million included in the economic development bill passed in July. This would result in cuts to the newly established Gateway Cities Transformative Development Initiative and the Brownfields Redevelopment Fund. MassDevelopment is moving forward with plans for both of these
programs. More funding will be needed in FY16 to support and expand these programs, which are vital for economic development and the revitalization of Gateway Cities.

**CHAPA Initiatives in Foreclosure Mitigation**
CHAPA continues to provide resources to foreclosure counselors throughout the Commonwealth who are assisting homeowners in danger of foreclosure or who have grievances against mortgage loan servicers.

On October 16, 2014, CHAPA convened a forum entitled “Understanding the Loan Modification from the Servicers’ Perspective”, featuring panelists from Bank of America, NationStar and Wells Fargo, each presenting that servicer’s philosophy of and protocols for loan modifications. Over 40 people participated, including members of the housing counseling community, state agencies, and business. After the presentations, the servicers’ representatives met in small groups with the attendees to talk in more depth about foreclosure mitigation strategies and the loan modification process. Among the issues discussed were investor restrictions and how to identify and respond to them and how to handle assumptions of loans in the event of death, divorce or other dissolution of a household.

The **Community Based HomeCorps (CBHC) Program** has now been operational for six months. Funded by the Attorney General’s Office (AGO), with CHAPA as Master Grantee, CBHC extends and adapts the HomeCorps Loan Modification Initiative to communities across MA. Under CBHC, CHAPA has taken the AGO enforcement model and adapted its structure to the new community-based model, providing -- in partnership with AGO trained Homeowner Advocates -- loan modification and homeless prevention services to residents in need of assistance. To date, CBHC is handling 644 open cases advocating for mortgage reinstatement or modification, where possible, or, if not, stabilization services. CBHC operates in every community through our sub-Grantees including: Coalition For a Better Acre, Urban Edge CDC, Neighborhood of Affordable Housing, Quincy Community Action Programs, Housing Assistance Corporation of Cape Cod, Oak Hill CDC, Twin Cities CDC, Montachusett Opportunity Council, Inc., NeighborWorks of Southern Massachusetts, HAPHousing, and Berkshire County Regional Housing Authority. For more information, please visit the CHAPA website at [https://www.chapa.org/CBHC](https://www.chapa.org/CBHC).

**Federal Housing Budget**
The FY15 omnibus appropriations bill signed by the President on December 16, 2014, provides $45.4 billion for HUD programs ($90 million less than in FY14) and as noted in a Center on Budget and Program Priorities (CBPP) summary, it leaves most HUD programs at “historically low levels”. Almost no programs were funded at levels that permit expansion of assistance. The final bill also does not include the cost-saving reforms for tenant-based rental assistance and public housing rental assistance proposed by HUD (including changing the threshold for medical deductions from 3% to 10% of income). The text of the bill can be found at [https://www.congress.gov/113/bills/hr83/BILLS-113hr83enr.pdf](https://www.congress.gov/113/bills/hr83/BILLS-113hr83enr.pdf). A National Low
Income Housing Coalition budget chart, found at http://nlihc.org/sites/default/files/FY15HUD-USDA_Budget-Chart-12.17.14.pdf, details the FY15 appropriations by program, with data on annual funding levels since FY10.

FY15 funding and provisions for major HUD programs include the following.

- **Tenant-Based Rental Assistance (TBRA):** The FY15 budget provides sufficient funding ($17.5 billion--up 0.7% from FY14) to renew all vouchers currently in use but not enough to fully restore all vouchers shelved in FY13 due to sequestration (1,431 in Massachusetts), according to an analysis by the Center on Budget and Policy Priorities (CBPP). As in FY14, the FY15 budget provides $75 million to fund 10,000 new vouchers for homeless veterans, although some of that will be reserved for a pilot program for homeless vets in Indian areas. Despite a small increase, administrative fees continue to be underfunded. HUD predicts that the FY15 proration will be about 75% (down from 79% in FY14). However, CBPP notes carryover funds may allow the proration to go as high as 78%.

- **Tenant protection vouchers (TPV)** are level funded at $130 million, $20 million less than the Administration requested to cover rising needs as mortgages mature. New language forbids the reissuance of TPVs to other families, except in the case of “replacement” vouchers (to be defined by HUD in a future Notice). The impact of this language will depend on HUD’s definition of “replacement”. The budget also continues a set-aside of $5 million for vouchers to assist families in low vacancy areas who would not otherwise be eligible for TPVs. This language has been very important to Massachusetts preservation efforts.

- **Project-Based Rental Assistance:** Funded at $9.73 billion, down 1.9 percent from FY14, including a 1.4% decrease for renewals. CBPP describes this funding as consistent with the Administration’s proposal to transition the program to a calendar year funding basis over two years. It notes that a $1 billion increase will be required in FY16 to complete the transition.

- **Public Housing:** The FY15 budget provides $4.44 billion for the operating fund, up $40 million from FY14 (0.9%). CBPP projects this will result in an 87% proration, compared to 88.8% in 2014. The budget language also allows larger PHAs (250 units+) to transfer up to 25% of their capital funding to their operating fund (vs. the 20% currently allowed by law), with no limit for transfers to anticrime and antidrug activities. (Smaller PHAs already have unlimited authority to move funds between capital and operating funds.) However, most PHAs have insufficient capital funding as is. The FY15 budget level funds the Capital Fund at $1.875 billion, continuing a $45 million set-aside of $45 million for ROSS and creating a new $15 million set-aside for a “Jobs Plus Initiative” pilot. PHAs will continue to see their capital backlog
grow (new needs increase by about $3 billion a year.)

- An administrative provision (§238) revises language added in FY14 that required that the rent for tenants who have opted to pay a flat rent be no lower than 80% of the Fair Market Rent. It allows HUD to establish an alternative floor based on local market conditions and lets PHAs seek exceptions if neither floor reflects local market conditions.

- **Rental Assistance Demonstration (RAD)** The appropriations bill includes an administrative provision (§234) making important, positive changes. It raises the current cap on the number of public housing (and certain Mod Rehab) units that can convert their subsidy to project-based Section 8 from 60,000 units to 185,000 units. It also extends the deadline for applying to participate from September 30, 2015 to September 30, 2018. It permanently extends the second component of RAD to preserve projects that have older forms of rental assistance and allows those conversions to be using either project-based rental assistance (PBRA) or project based vouchers (PBV). It also adds language to allow RAD to be used to preserve McKinney Vento Mod Rehab SRO units.

- **Family Self Sufficiency** Level funded at $75 million. New language extends eligibility to families in Project Based Rental Assistance developments (at owner’s option). It also authorizes HUD to create a demonstration to test the effectiveness of offering FSS services to homeless youth with vouchers under the Family Unification Program (FUP).

- **HOME Investment Partnerships**: Provides $900 million, down 10% from FY14.

- **Homeless Assistance**: Provides $2.135 billion, up 1.4% ($30 million) from FY14 and far less than the $2.41 billion requested by the Administration. The Administration’s request included a 20% increase for renewals and a new 37,000 bed permanent supportive housing initiative. The latter was not funded and, as CBPP notes, it is difficult to predict renewal requests and thus whether the final FY15 amount will be adequate to support all renewals.

- **Section 811**: Provides $135 million, sufficient to renew existing contracts but includes no funding for new project-based rental assistance (the Administration had requested $25 million for that purpose).

- **Section 202**: Funded at $420 million, sufficient to renew existing contracts but with no funds for expansion. Funding for service coordinators was reduced slightly.
• **Community Development Block Grants (CDBG):** Provides $3.0 billion for formula grants, down 1% from FY14.

**Other Federal Housing Legislation and Activity**

**National Housing Trust Fund:** On December 11, 2014, Federal Housing Finance Agency (FHFA) Director Mel Watt lifted the suspension on Fannie Mae and Freddie Mac's obligation to fund the National Housing Trust Fund and Capital Magnet Fund. Congress created these two funds in 2008 but due to the financial crisis, contributions were suspended before they ever began. Starting January 1, 2015, Fannie Mae and Freddie Mac are required to set aside a portion of each loan they purchase from lenders, which will provide an estimated $300 million to $700 million a year for the two funds. The National Low Income Housing Coalition reports that first distributions to states are expected to start in early 2016. Refer to [http://nlihc.org/article/last-funding-national-housing-trust-fund-begin](http://nlihc.org/article/last-funding-national-housing-trust-fund-begin).

**GSE Reform**  Housing Finance reform proposals remain stalled.

**The Expanding Opportunities Committee (EOC)**  
This committee, meeting since July of 2006, and co-chaired by Sarah Lamitie, Jackie Cooper, and now Jennifer Erickson, was formed to explore possible diversity initiatives, both to increase participation in CHTF by people of color and other underrepresented groups, and to assure that programs supported by CHTF will have a positive effect on social justice and equity issues. The committee is implementing an action agenda to enhance inclusiveness in housing in cities and towns throughout the state. In connection with this diversity initiative, please extend an invitation to colleagues you may know who would be interested in joining the Task Force. They can join the CHTF at no cost by sending their contact information to Eleanor White at ewhite@housingpartnersinc.com. Please refer to the CHTF website, [www.commonwealthhousingtaskforce.org](http://www.commonwealthhousingtaskforce.org) to review previous Quarterly Reports for a general description of this committee, and prior initiatives of the group.

This topic has achieved new visibility this Quarter, especially as Mayor Walsh has indicated that it is one of his priorities for the City of Boston. As a result, the *Boston Globe* devoted two articles on December 3, 2014 to exploring a wide range of ideas to make Boston a more inclusive city. These ideas are useful for all communities, and will form the basis of future discussions of the EO Committee as it crafts an action agenda for 2015. See both *Boston Globe* articles in Appendix IV of this Report.

All are welcome to join the Expanding Opportunities Committee; please send your contact information to both Eleanor White, CHTF Co-Chair, at ewhite@housingpartnersinc.com and Maura Fogarty at the Boston Foundation, at Maura.Fogarty@tbf.org. Only those who have signed up for this committee will receive notices of future meetings. Comments about the agenda for the EO Committee should be
addressed to Sarah Lamitie, Jacqueline Cooper, and Jennifer Erickson, the co-chairs of the Committee. They can be reached at slamitie@bostonprivatebank.com (Sarah), cooperjlw@gmail.com (Jackie), and JERickson@mapc.org (Jennifer) respectively. Thanks to Jackie, Sarah, and Jennifer for their leadership of this effort, and to Boston Private Bank for providing the regular meeting space for this committee.

The Public Housing Committee

CHTF has lent strong advocacy support to the effort to significantly increase funding for state-assisted public housing development and management over the last several years. Charles Eisenberg, an affordable housing consultant with extensive experience with public housing, and Jim Stockard, recently-retired Curator of the Loeb Fellowship Program at the Harvard Graduate School of Design (and a long-time member of the Board of a local Housing Authority), are serving as co-chairs of this CHTF committee. As with all CHTF committees, membership is open to all. We particularly invite local public housing authority staff and board members, and members of community-based nonprofit organizations, to consider participating in this committee. The Public Housing Committee met this Quarter on November 13, 2014.

Since the Public Housing Reform Bill was passed by the legislature in the summer of 2014, the MA Department of Housing and Community Development (DHCD) has established five working groups to facilitate implementation of the legislation. Regulations are expected to be completed by the beginning of 2015 covering those areas mandated for immediate implementation. It is estimated that implementation will eventually cost about $3 million, which can be covered in the existing budget.

One of the first items to be put in place will be the centralized applicants’ waiting list. The Department is also requesting pre-applications from Housing Authorities to facilitate the establishment of regional authorities.

Because of its complexity and the requirement for additional operating funds to meet the 20% subsidy increase requirement, the Innovations section of the legislation will not be put in place until next year.

The Committee then discussed other areas that require attention. Immigration status continues to be an issue, particularly un-documented immigrants living in public housing. It was noted that evicting these families would simply add to the homelessness problem.

Another concern is that operating subsidies remain significantly below what is necessary. As the Reform Bill is implemented, it is hoped that savings will be put back into the public housing budget so that property deterioration can at least be slowed. The Committee also agreed that it should push for a $100/unit increase per year in the operating subsidy in the next budget.
Finally, the Committee suggested that a pilot program implementing the Innovations provisions in one geographic area might be of interest to the new Administration.

Please refer to the last several CHTF Quarterly Reports for a more comprehensive discussion of the issues currently being addressed by this committee. We have seen a significant expansion of membership of the CHTF Public Housing Committee.

Based on this Quarter’s update, it is clear that public housing will continue to be in the forefront of State housing policy discussion for some time. CHTF members interested in signing up for this committee and receiving notices of future meetings can reach Charles Eisenberg at 617-901-3378 or ceisenberg@comcast.net, and Jim Stockard at 617-913-3264 or jstockard@gds.harvard.edu. Many thanks to Nixon Peabody for providing the meeting space for this committee.

Work with the Urban Land Institute Housing and Economic Development Council

Eleanor White and Ted Carman have represented CHTF with the local district council of the Urban Land Institute, ULI Boston, particularly with the Housing and Economic Development (H&ED) Council, now co-chaired by Matt Zahler, of Trinity Financial and Travis D’Amato of Jones Lang LaSalle.

This multi-disciplinary group is intended to build on the ULI membership of for-profit housing developers, multi-family lenders & investors, CDC’s, public officials, and housing design and construction firms, and is topically focused around the creation, development and financing of multi-family housing and economic development. The H&ED Council will continue to work on initiatives and pursue strategic alliances that can effect change on a regional basis, and is pleased to be an active partner of CHTF.

Over the course of the past year, the Council has focused on seeking out and meeting with speakers to discuss what issues are affecting housing costs and what can be done to address them. The Council’s most recent meeting was held on November 19, 2014, at the offices of Cohn Reznick, which has agreed to be the Council’s Boston sponsor. Nancy Ludwig, President of ICON architecture, and Bert Rodiger of Schochet Companies have stepped down as co-chairs, and the group added Travis D’Amato of Jones, Lang Lasalle to the group as a co-chair, joining Matt Zahler of Trinity Financial.

The speaker at the November meeting was Matt Edlen of Gerding Edlen. Matt spoke about his firm’s Boston projects and their ability to work with and in local communities, which is similar to how they operate on the West Coast. The committee also conducted a conversation about the high cost of housing construction in the Northeast and the need to create more workforce type housing – both continuing to be re-occurring themes of the group’s past discussions.

The H&ED Council typically meets approximately every other month on the second Wednesday of the month. The meetings take from 8-10AM, now at the
offices of Cohn Reznick at 1 Boston Place in Boston. CHTF members who are interested in more information on becoming a member of ULI Boston and its Housing & Economic Development Council may contact Michelle Landers, at Michelle.Landers@ULI.org, or at 857-263-7585; or get in touch with the current Council Co-Chairs Matt Zahler at mzahler@trinityfinancial.com or Travis D’Amato at travis.damato@am.jll.com.

**Legal Issues Involving Chapter 40R and Affordable Housing**

We are not aware of any current litigation involving policy issues relating to Chapter 40R at this time.

However, we did notice an interesting case involving Chapter 40B, the state’s “snob zoning” law. In Stoneham, the town is trying to disallow the development of an affordable housing proposal, contending that it would put the town over the threshold land area total for affordable housing referenced in the 40B statute, even though the town is nowhere near the 10 percent goal of affordable housing units. This may be one of the few times that this argument has been advanced to oppose a 40B project, and it will be interesting to see the outcome. The description of this case, in an article in *The Boston Globe* of November 23, 2014, can be seen in Appendix IV of this report. And the City of Newton reported that it has also passed the threshold (1.5% of developable land in the City).

CHTF members are welcome to bring any housing litigation, especially any relative to Chapter 40R, to our attention. Please contact the Chair of the Legal Committee (and co-Chair of the CHTF) Larry DiCara at ldicara@nixonpeabody.com.

**Congratulations and Work with the Local, State, and Federal Administrations**

Congratulations to our colleagues David Abromowitz of the law firm of Goulston and Storrs, and Andrea Daskalakis of the MA Housing Investment Corporation (MHIC) for their selection as recipients of National Vision Awards from The National Housing & Rehabilitation Association (NH&RA). The awards were conferred by NH&RA at their national conference in Boston on October 6, 2014. Those of us who have worked closely with David and Andrea for many years can attest to their innovation and creativity in affordable housing programs.

Congratulations also go to Shaun Blugh, appointed by Mayor Marty Walsh as Boston’s first Chief of Diversity, and to Brian Golden, appointed by Mayor Walsh as permanent Director of the Boston Redevelopment Authority (BRA). Articles about these appointments in the *Boston Globe* (on December 3, 2014) and *Banker and Tradesman* (on December 10, 2014) can be found in Appendix V of this Report.

And, as mentioned earlier in this Report, congratulations to the new state officeholders elected in November, 2014 and to new members of the Executive Branch in Governor Charles Baker’s incoming administration.
Many members of CHTF have provided advice and guidance (both formally and informally) over the last eight years to the staff of Governor Deval Patrick, Secretary of Housing and Economic Development Greg Bialecki, and DHCD Undersecretary Aaron Gornstein, especially on issues relating to Chapter 40R. We wish outgoing Patrick administration staff great success in their future positions, and hope that they will join CHTF. We look forward to providing similar assistance to the new Baker administration.

Eleanor White has long represented the CHTF in a series of Stakeholders’ Meetings with the Secretary for Elder Affairs of the Commonwealth, Ann Hartstein. The Elder Stakeholders’ Group includes representation from more than 20 organizations and coalitions dealing with issues affecting older adults in Massachusetts. The most recent meeting of the full Stakeholders’ Group was held on November 20, 2014. Meeting notes from that session and from the previous session on August 21, 2014, can be found in Appendix V of this Report. We hope that the incoming Secretary of Elder Affairs (not yet identified as we go to press) will maintain a similarly close working relationship with this group.

Expansion of the Task Force

We have been gratified again this Quarter with requests from new people to participate in the Task Force, especially those interested in diversity initiatives, public housing, and the connections between housing and health. We are particularly interested in increasing our representation of people of color on our email list, and in their active participation in committees and plenary meetings.

The Boston Foundation, under the leadership of Paul Grogan and Mary Jo Meisner, continues to play the critical role of convener of the Commonwealth Housing Task Force.

Also thank you to all of the CHTF participants. Please send updates to your contact information to ewhite@housingpartnersinc.com. You can reach Eleanor White at Housing Partners, Inc. (617-924-7240 x11 or ewhite@housingpartnersinc.com); Barry Bluestone at the Northeastern University Dukakis Center for Urban and Regional Policy (617-373-8595 or b.bluestone@neu.edu); and Ted Carman at Concord Square Planning and Development (617-482-1997 or carman@concordsqdev.com). Please note that email messages about CHTF will often be coming from Maura Fogarty at The Boston Foundation (maura.fogarty@tbf.org).

Respectfully submitted: Eleanor White, Barry Bluestone, Ted Carman

December, 2014 (APPENDICES FOLLOW)
NOTES TO APPENDICES

As we have provided increasing amounts of source documents in the Appendices, we thought it would be helpful to point you to the various sections. This should make it easier for you to find specific documents that you may want to review in their full and original context.

<table>
<thead>
<tr>
<th>Appendix</th>
<th>Starts on Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appendix I: Progress of Chapter 40R</td>
<td>19</td>
</tr>
<tr>
<td>Appendix II: Housing Market</td>
<td>23</td>
</tr>
<tr>
<td>Appendix III: Millennial Housing/Programmatic Developments</td>
<td>30</td>
</tr>
<tr>
<td>Appendix IV: Expanding Opportunities/Public Housing/ULI/Legal</td>
<td>57</td>
</tr>
<tr>
<td>Appendix V: Congratulations and Work with Others</td>
<td>71</td>
</tr>
</tbody>
</table>
Appendix I to CHTF Quarterly Report September, 2014
Update of Progress under Chapter 40R: Smart Growth Zoning and Housing Production Act

The current housing market in Massachusetts appears to be stabilizing, with rents increasing. In this environment, communities across Massachusetts continued to explore the adoption of Chapter 40R smart growth zoning districts during this period.

Other states—notably Connecticut and New Jersey—have also taken notice of the results that 40R has produced. Specific information has been provided in previous Quarterly Reports.

As detailed in this Appendix, more than 50 cities and towns in the Commonwealth have either passed Chapter 40R districts, or are in some stage of consideration. The map in this Appendix shows these municipalities, their district status, and data regarding their districts. We would like to thank Bill Reyelt of DHCD for his assistance in the preparation of this information.

Since 2006, in Massachusetts the towns of Belmont, Grafton, Ludlow, Lunenburg, Norwood (two districts), North Reading, Plymouth, Dartmouth, Lakeville, Natick, Amesbury, Kingston, Lynnfield, North Andover, Reading (two districts), Bridgewater, Easton, Westfield, Marblehead (two districts), Sharon, and the cities of Boston, Brockton, Chelsea, Chicopee, Easthampton, Haverhill, Holyoke, Lawrence, Lowell, Northampton, Fitchburg, and Pittsfield have all successfully had Chapter 40R applications approved by DHCD and have passed Chapter 40R districts. Among them, these 32 localities have provided zoning as-of-right for over 12,744 units of housing, at least 20 percent of which will be affordable to households earning less than 80% of the area median income. Three communities, Ludlow, Norwood and Swampscott, with as-of-right zoning allowing for 446 housing units, have recently passed Districts. Two of the three communities, Ludlow and Norwood, have recently received final DHCD approval. Swampscott has approved its proposed 40R District, which is waiting for the approval of the Attorney General and DHCD, anticipated in early 2015.

Within the 40R Districts, building permits for 2658 units have already been issued. And we believe that an additional 208 residential units have received Plan Approval from the permit granting authority and/or have received tax credit awards: Lowell (Mass. Mills III—70 units) and Natick (Natick Mews—138) have either yet to submit building permits or have yet to apply for them due to other permitting (MEPA) and market conditions.

Andover, after having received a 40R Letter of Eligibility, did not adopt a district and has instead decided to move forward in the area with a fully market rate development. Although this will not contribute to the overall statewide number of 40R units approved or built, it appears that high density housing, generally consistent with the density requirements of Chapter 40R, will move forward in Andover.

Last spring, Ludlow submitted an application for a new Chapter 40R District containing 334 future zoned new housing units; DHCD issued a letter of approval in July, 2014. In a process that is not the usual (or ideal) sequence, the District was approved at Ludlow’s fall town meeting in advance of DHCD’s issuance of a letter of eligibility.

Southampton has discussed a highly creative 40R Plan with DHCD that consists of 100 acres along the Route 10 corridor at the north end of the Town. This district has just 3 acres of
developable land, with 70 potential 40R Units. However, the size of the proposed district means that in other areas where there may currently be development (such as an older, perhaps outmoded, strip shopping center or other lower density residential or commercial parcels), the property owners will have an as-of-right ability to redevelop their properties with Chapter 40R densities and with mixed use.

This proposal would be carried out in cooperation with Easthampton which is considering a companion district that would abut the Southampton District. In addition, the proposals would result in an extension of the sanitary sewer line in Easthampton along Route 10 into Southampton. This would, of course, make it easier to carry out redevelopment projects with higher density – very much meeting the goals of Smart Growth Zoning. The Pioneer Valley Regional Planning Commission and John Furman, the chair of the Southampton Planning Board, are to be commended for the creativity they have brought to the situation.

Newburyport, South Hadley, Scituate, and Amesbury are also believed to be working on new 40R Districts, with South Hadley and Scituate believed to be the furthest along.

Not all the news is positive these days; with the economic problems facing both municipalities and property owners, four towns that had been considering using 40R have decided to abandon their efforts at least for the time being. Attleboro and Holden have discontinued their preliminary investigations, Rockland is moving forward without 40R, and Weymouth did not move forward with a district that had received a Letter of Eligibility from DHCD.

On the bright side, we are seeing movement in project construction in Chapter 40R districts, with Easthampton having 50 affordable units move into construction. Easton’s 40R developer has received building permits for 50 units and is under construction. In Dartmouth, the Village at Lincoln Park is under construction, with 36 affordable family homes. The Yarn Mill in Fitchburg (94 units) is under construction. Construction has been completed on Pittsfield Silk Mill project. Construction has also been completed in the first, second, third and fourth Phases of Reading’s Gateway District. A developer in Reading’s Downtown District has completed construction of 53 units. In Brockton, construction has been completed on two units (a two family house developed by the Brockton Housing Authority), and construction is complete on a 25 unit project just a block from the commuter rail station. In Fitchburg, Riverside Commons has nearly completed construction of 109 apartment units, and has received a building permit for 67 additional units. Lunenburg has completed construction on its second phase of 33 units. Construction of phase 2 of 104 units in Lakeville is completed.

This work amounts to nearly 300 units under construction or recently completed, and a total of 2658 building permits issued to date. It addition it appears that there are several hundred units that have site plan approval and are expected to obtain building permits in the near future.

We are aware of recent interest in Chapter 40R (or additional districts under 40R) in other cities and towns, including: Dennis, South Hadley, Amesbury, Newburyport, Southampton, Norwood, Adams, Great Barrington, Bridgewater, Malden, Marshfield, Barnstable, Haverhill and Tyngsborough. Natick is considering a second district. Other cities and towns and local groups have expressed preliminary interest in the program. In addition, we have observed that developers – both nonprofit and for-profit – are starting to explore the use of Chapter 40R in partnership with localities now that the economy is showing significant signs of revival in many
markets across Massachusetts. 40R continues to be regularly featured in conferences and seminars for real estate professionals.

It is noteworthy that, with only three exceptions (Norwood, Hingham and Newburyport), every eligible 40R district that has been brought to a vote has received the required approval of 2/3 of the local governing body. This includes votes in smaller communities such as Lynnfield and Kingston in which 40R bylaws allowing significant growth were approved at Town Meetings with the largest attendance on record. We attribute this to the positive nature of the collaborative local process required to develop the 40R plan and most particularly the local municipality’s right to develop their own design standards. It appears that because so much input and cooperation is required locally to develop the district proposal, by the time the question is put to a vote, most stakeholders in the city or town have contributed ideas to the plan and are supportive of the concept.

We also ask that you please let CHTF staff know where you have heard of particular interest in learning more about Chapters 40R and 40S (or where you believe that Chapter 40R would be especially beneficial to a city or town), and we will respond with outreach to those localities. Just send a message to ewhite@housingpartnersinc.com and we will follow up with the locality to offer support as may be needed. It will be helpful if you include the name of a contact person in the city or town with phone number and email address, but if you cannot provide that, just send the name of the city or town.

Many of the communities that are currently in the planning stages for 40R districts have not yet determined or estimated the number of Future Zoned Units, and it is possible that the total number will increase dramatically in the coming years. We also believe that the strengthening economy will likely have an impact on the degree to which communities will focus on this program in the year ahead. And we believe that with the continuing affirmation of the state’s affordable housing law under Chapter 40B, the interest level in Chapter 40R will also increase. Zoning for smart growth districts is the prudent way to provide a “relief valve” for communities facing Chapter 40B developments that are inappropriate for the location based on local comprehensive planning, site conditions, etc.

Please refer to the map below, provided by DHCD, showing the distribution of 40R localities throughout the Commonwealth. We are particularly gratified that interest is being expressed by cities and towns of all sizes and types.
Our conversations with Regional Planning Agencies and others who regularly provide technical assistance to municipalities indicate that many more of them are now expressing interest in 40R.
Appendix II: The Housing Market, December, 2014

II. Banker and Tradesman, Sunday, October 12, 2014

Canary In The Coal Mine
Cambridge’s Boom a Desert for Middle Class Families in Decline As Home Prices Surge
By Colleen M. Sullivan, Banker & Tradesman Staff

The recovery from the housing crash has been spread unevenly among Massachusetts’ cities and towns, but metro Boston cities like Cambridge and Somerville have received a double helping of price growth – and, in the past few years, a wave of new supply, with millions of square feet of new construction currently in the pipeline. But a look beneath the numbers suggests that underneath the sunshine, the squeeze is on, and it’s middle-class families who are the lemons.

Cambridge, with plethora of renowned universities and booming tech scene, has long been a student mecca, and an especially desirable address for many buyers. But while the city as a whole has seen steady growth, the number of families residing there has been in steady decline: According to the most recent Census figures, in 2010, the number of families in the city dropped by nearly 40 percent from its peak in the 1950s.

The current recovery may finally complete crash, hollowing out the city’s middle class, as home prices surge beyond all but the fattest pockets.

Statewide, median single-family home prices have not yet recovered from their 2005 peak – through July 2005, the median single-family home price in the Bay State was $355,000, while this past July, it was $335,000. Cambridge, however, has seen single-family prices simply skyrocket in the past 10 years. According to the most recent sales data from The Warren Group, publisher of Banker & Tradesman, the median single-family price in Cambridge through July 2014 was $1.25 million, nearly double July 2005’s $665,000.

“We’ve seen the working class getting pushed out in the ’50s and ’60s; now the middle class is getting pushed out,” said Richard Krushnic, a member of the Cambridge Resident’s Alliance (CRA), an activist group which wants to slow down development in the city.

Much More Multifamily
The huge spike in single-family home values has not quite been replicated on the multifamily side. (Condo prices in Cambridge are up 37.8 percent from their 2005 peak, compared to 11.1 percent for condos statewide.) That’s a reflection of the fact that plenty of supply has been hitting the market. Cambridge has several huge new projects.
currently at various stages of completion near the Alewife Brook parkway and at NorthPoint, the former railyards in East Cambridge.

But little of the new supply is aimed at families: Of 244 units at 165 Cambridgepark Drive, near Alewife, only nine are three-bedroom. The Residences at Fresh Pond, a 429-unit development, are all one- and two-bedroom, as are the 300-plus completed units at NorthPoint. (Another 350 units out of a the 2,700 called for by the project’s master plan are currently under construction, of which the developer has pledged that “some” would be three-bedroom units.)

The CRA is pushing for several solutions, including an increase in inclusionary zoning requirements so that 25 percent of newly constructed units would have to be affordable, including 5 percent reserved middle-income residents, and calling upon the city itself to spend its own funds to develop more middle income housing.

But Cambridge’s current stringent affordable housing laws – the city already sets aside 11.5 percent of units as affordable under the current inclusionary zoning requirement – have done little to stem the tide.

Cambridge’s problems exemplify an issues that’s becoming a concern across much of the Greater Boston area, said Brenda Clement, executive director of the Citizen’s Housing a Planning Association (CHAPA).

“The market needs to work for everybody. Cambridge has become, very quickly, a dumbbell community, with very low-income individuals and very high-income individuals. That’s not a sign of a good, healthy economy,” Clement remarked in a recent meeting of Boston housing activists.

But, Clement told Banker & Tradesman, Cambridge is far from the only community where the sparsity of middle income housing is a concern. The issue has come up several times in recent regional meetings CHAPA’s held with community members, and CHAPA is planning to create a working group in order to discuss solutions.

Email: csullivan@thewarrengroup.com
- See more at:
http://www.bankerandtradesman.com/article.php?RF_ITEM[]=Article$0@161439;Article&css_display=print#sthash.0oWciTdg.dpuf
II. Boston Globe  November 28, 2014

Demand soars for affordable housing in Boston area

By Katie Johnston  GLOBE STAFF  NOVEMBER 28, 2014

When a local nonprofit announced a lottery for a new batch of rental subsidy vouchers this month, applicants jammed the lobby — young and old, black and white, immigrant and Boston-born. Some were homeless families living in cramped motel rooms; others were single moms hoping to move their children to safer neighborhoods.

Boston and much of the rest of Massachusetts are in the midst of an affordable housing shortage that shows few signs of abating. The rate of new housing production in Massachusetts is among the lowest in the country, with luxury units in the booming downtown and beyond expected to make up the vast majority of new apartments built in Boston in the next three years. One in four renters in the state spend at least half their household income on rent — considerably higher than the one-third recommended by financial specialists.

Housing subsidies have been slashed, shelters are over-capacity, and the homeless population is increasing faster than in any other state in the country, according to the US Department of Housing and Urban Development. More than 21,000 Massachusetts residents are homeless, a 40 percent increase in the past seven years.

Among them is Dineen Duro, 31, who has been living in the Days Hotel in Brighton with her young son for two years, one of nearly 5,000 families the state is housing in emergency shelters and motels. She estimates she has applied for about 50 kinds of housing assistance during that time.

Duro knows the odds of landing a rental voucher are long, but she’s hoping for “a little bit of normalcy.” “This way, me and my son aren’t crammed into one tiny little room,”
she said. “And this way I can actually cook dinner. There’s not much you can do with a microwave.”

Duro said she is in a daily substance abuse program to kick her painkiller habit, and hasn’t been able to find a job that fits into that schedule. She went to the Metropolitan Boston Housing Partnership office earlier this month wearing a red bandana over her hair, nose pierced and eyes dramatically lined to apply for one of the slots in the Massachusetts Rental Voucher Program. The recipients, chosen by lottery, will be notified next week.

The state has 6,600 rental vouchers to help low-income families pay for apartments, a third of what it had in the early 1990s, due to budget cuts, according to Massachusetts housing officials. The number of vouchers has risen modestly over the last few years, but not nearly enough to keep up with demand.

Residents awarded a voucher pay up to 40 percent of their income toward rent, and the voucher, which can be used only at lower-priced units, covers the rest. To qualify, a household must make less than 50 percent of the median income of Boston-area residents – below $42,350 a year for a three-person household. The average annual income of families who currently have vouchers: $13,000.

“The situation continues to worsen for families at the lowest income levels,” said Chris Norris, executive director of the Metropolitan Boston Housing Partnership. “Our fear is that if we don’t get more resources, the state rental voucher wait list will look like our Section 8 wait list, which is 11 years long.”

Section 8, a federal housing voucher program, limits monthly rent payments of low-income families to 30 percent of gross income. Last year, budget cuts eliminated more than 1,400 of the state’s Section 8 vouchers, making the shortage more acute. Federal funds for building affordable housing in the state were also sliced in half last year. The Boston Housing Authority has a wait list of 40,000 households for 15,000 subsidized units.

Massachusetts does more for low-income residents in need of housing than many other states, said Aaron Gornstein, the state’s undersecretary of Housing and Community Development. It is one of the only states that fund public housing, for instance, and has a program to preserve affordable units.

Still, many families are struggling to keep a roof over their heads.
Marta Diaz, 44, has lived in public housing in Dorchester for 17 years, and currently shares her four-bedroom apartment with three daughters and two grandchildren. But the neighborhood is unsafe and the apartment is run down, said Diaz, who is about to be laid off from her nursing home job in Brookline. “The crime rate is so high,” said Diaz, who was filling out an application for one of the newly available rental vouchers. “I don’t have the money to afford somewhere else to live.”

To help meet the growing need in Boston, Mayor Martin J. Walsh has committed to creating 6,500 new units by 2030 aimed at families making less than 60 percent of the median income — with a quarter of those designated for even lower-income households. The annual median income for a renter in Boston is around $35,000, or about $3,000 a month, according to Michael E. Stone, professor emeritus of community planning at the University of Massachusetts Boston. The average rent for a one-bedroom apartment in the city is almost $2,000 a month.

Richard Beaupre is another of the 10,000 applicants waiting anxiously to see whether he will win a voucher. Beaupre, 28, has been living in the New Englander Motor Court in Malden with his fiancee and two daughters, ages 1 and 2, since February, and he’s desperate to get out. The family sleeps on two beds pushed together. Their clothes are in suitcases; their pasta dinners are boiled in the microwave. Beaupre, who was laid off from a retail job and then evicted from his apartment, walks 2 miles down Route 1 to get to his $9-an-hour job at the Disney Store at the Saugus mall. Recently, Beaupre’s oldest daughter pointed at the motel from her stroller and said, “Home.” Beaupre was quick to correct her. “That’s not home, sweetie,” he said. “That’s a room.”
II. From the National Low Income Housing Coalition October, 2014

Initial Findings from the 2013 American Housing Survey

On October 16, the Census Bureau released the first findings from the 2013 American Housing Survey (AHS). The AHS is the only comprehensive national survey focused on housing. It is conducted in odd-numbered year, tracking the same units over time, in order to show changes to the housing stock. The 2013 survey included new questions regarding disaster planning and emergency preparedness, public transportation, household involvement in neighborhood and community activities, and “doubled-up” households, focusing on adult children who live at home.

The 2013 national summary tables show that out of the 115.9 million occupied housing units in the country, nearly 2 million (1.7%) had a severe physical problem (including plumbing, heating, or electrical problems), and nearly 4 million (3.4%) had a moderate physical problem. Rental units were more likely than owner-occupied units to have physical problems. Nearly 3% of rental units had a severe physical problem and 6.2% had a moderate physical problem, compared to 1% of owner-occupied units with a severe problem and 1.9% with a moderate problem.

The survey explored other deficiencies. The one reported most often by renters was signs of cockroaches in the last 12 months (16%), and the one reported most often by owners was signs of mice in the last 12 months (9.5%). Other top issues for renters were water leakage from inside the structure (9.5%), signs of mice (8.3%), and being uncomfortably cold for 24 hours or more (7.9%). For owners, other top concerns were water leakage from outside the structure (8.5%), signs of cockroaches (7.3%), and electric fuses or circuit breakers blown in the last 3 months (6.9%).

The AHS includes housing cost data by tenure. Median monthly housing costs for renters ($850) was less than housing costs for owners ($934). However, a HUD press release indicates that costs for renters increased from $808 in 2009, while costs for owners decreased from $1,000. Furthermore, 27.1% of renters spent more than 50% of their income on housing costs, compared to 12% of owners. In 2013, 17.2% of all renters spent 70% or more of their income on housing costs.

In 2013, 17.9% of owner households and 17.7% of renter households had one or more persons with a disability. A physical disability was the most common disability among renters (11.1%) and owners (10.9%). Renter households were more likely to include a member with a mental disability (6.3%) than owner households (4.9%), while owner households were more likely to include a member with a hearing disability (5.9%) than renter households (3.9%).

One of the special topics covered in the 2013 AHS concerned doubled-up households, defined as households with at least one person over the age of 18 who is not a cohabiting partner and is not enrolled in school. The survey posed questions to households that either had a member move out or move in during the past year. Close to 20 million
households had a doubled-up member move in, and 4.4 million had a doubled-up member move out. Those who moved in were most likely to list financial reasons (18.9%) for leaving their previous residence. The majority (56.6%) of doubled-up household members who moved out had stayed doubled-up for more than 12 months. Nearly 29% of those moving out did so due to a major change in the family through marriage, new relationship, divorce, death, or separation. Almost one-quarter of the people who moved out ended up moving into the homes of family or friends, therefore remaining doubled-up.

Data is available on numerous other characteristics, including: manufactured housing, vacant units, family composition, income, housing and neighborhood quality, utilities, appliances, remodeling and repair, and recent moves. Each table shows data by tenure, census region, inside/outside a metropolitan statistical area, and selected household characteristics such as 65 and older, below poverty level, Black not Hispanic, and Hispanic.


Along with the summary tables, the Census Bureau also released the 2013 AHS National Public Use File, containing individual survey responses. These microdata are available at http://www.census.gov/programs-surveys/ahs/data/2013/ahs-2013-national-public-use-file--puf-.html.
Appendix III: Millennial Housing/ Programmatic Developments
December, 2014

III. Boston Globe 12-1-14
Millenials
By Catherine Cloutier Globe Staff December 01, 2014

They grew up here or moved here, for work or for school. They have stayed, shaping how the Boston area works, plays, and operates. Today, Boston is home to the largest proportion of young adults of any major US city, passing famously young cities such as Austin and Washington. People age 20 to 34 make up more than a third of Boston’s population, with even higher percentages in Cambridge (44.5) and Somerville (44).

Not only is one of America’s oldest cities now decidedly young, but the new generation is exercising its influence. Young adults make up about 45 percent of eligible voters and nearly half the city’s workforce. They are an economic engine, adding $1 billion annually in goods and services to Boston. That’s according to the city’s ONEin3 initiative, which, according to its website, aims to connect Boston’s young adult population with resources related to housing, professional development, financial health, entrepreneurship, and civic engagement.

And they are shaping their neighborhoods, promoting enterprises such as Zipcar and Hubway, attracting companies through entrepreneurship and innovation, and advocating for an arts and late-night entertainment scene. The T now runs later on weekends; free wireless Internet is expanding. While such efforts are not specific to Boston, the rate of demographic change outpaces other “young” cities. Boston’s 20- to 34-year-old population increased by 11 percent between 2000 and 2010, compared with New York’s 3.9 percent increase and San Francisco’s 3.3 percent decline, according to the US Census.

“The city is trying harder to speak to the younger generation, and make things better for them,” said Neda Talebzadeh, 26, a University of Massachusetts Amherst graduate who moved to Somerville.

Boston tops list of young adult destinations

Top 10 major cities by percentage of population between 20 and 34 years old

<table>
<thead>
<tr>
<th>City</th>
<th>Total population</th>
<th>20 to 34 year olds</th>
<th>Percent of total population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boston</td>
<td>617,594</td>
<td>216,213</td>
<td>35.01%</td>
</tr>
<tr>
<td>Austin</td>
<td>790,390</td>
<td>251,064</td>
<td>31.76%</td>
</tr>
<tr>
<td>Washington</td>
<td>601,723</td>
<td>188,855</td>
<td>31.39%</td>
</tr>
<tr>
<td>Seattle</td>
<td>608,660</td>
<td>181,501</td>
<td>29.82%</td>
</tr>
<tr>
<td>Columbus</td>
<td>787,033</td>
<td>233,163</td>
<td>29.63%</td>
</tr>
</tbody>
</table>
Like their peers across the country, members of Greater Boston’s millennial population face crippling student debt, a slowly recovering job market, and mounting expenses. But with a greater proportion of residents facing these problems than any other US city, Boston feels an exponential weight of these burdens. This means more people here face daily sacrifices and decisions: shoebox apartments shared with roommates long into adulthood, long commutes or delayed car ownership, and in some cases, underemployment.

Pew Research Center studies have found today’s young adults to be less likely to get married than their predecessors; when they do, it tends to be later in life. In Boston, 83 percent of 20- to 34-year-olds are unmarried. Kristin Mattera, 31, calls her Boston-area lifestyle “stunted adulthood.” “In the city, everything happens later,” she said.

Kristin Mattera, 31, calls her lifestyle “stunted adulthood,” and says, “in the city, everything happens later.”

**Boston’s workforce youngest of major US cities**

Greater Boston welcomes nearly 400,000 students from around the world each year, according to the US Census. About 37 percent of Boston’s young adult population is enrolled in school, according to the ONEin3 initiative. But the area has traditionally struggled to retain them after graduation, said Dan Schawbel, managing partner of Millennial Branding, a Gen Y research and consulting firm.

That might be changing. More 25- to 34-year-olds work in Boston than any other age group, according to the Boston Redevelopment Authority. The unemployment rate for this age group is 7.4 percent, significantly lower than the citywide rate of 9.6 percent.

**A youthful workforce**

Major US cities by percent of labor force between 20 and 34 years old

- **Boston**: 48.2%
- **Austin**: 45.1%
- **Washington**: 45.1%
- **Columbus**: 43.4%
Chicago  42.9%
Philadelphia  41.7%
Seattle   40.9%

**DATA: Boston Redevelopment Authority**

But some residents say jobs remain elusive. “If you want to land a decent job, you’re going to have to pound the pavement every single day,” said Luke Stankowski, 30, who works in financial services and lives in Brighton. “Even then, it doesn’t always work out. You’ll have to settle for something below what you were expecting.”

In recent years, technology companies, including Google and Facebook, have opened offices in the Boston area to tap the local talent pool. Others, such as RunKeeper and Care.com, were created by regional entrepreneurs. That, in part, has led to Boston’s number two ranking in the country for technology employment in a report by commercial real estate firm Jones Lang Lasalle; the area has more than 145,000 tech jobs. Since 2013, the industry has seen a 4.3 percent jump in the number of positions.

Technology startups disproportionately employ young workers and are drawn to locations with denser populations of young adults, according to a study on their hiring practices at the University of North Carolina-Chapel Hill.

**Scrambling to make it work in Greater Boston**

Young adults in the Boston metropolitan area have one of the highest median salaries for this generation — $50,400, according to Payscale — but that benefit is dwarfed by the area’s rising cost of living. “Over my seven years here, I can definitely say that rents have gone up,” Stankowski said. “It’s either you move, or you take a $50 or $100 increase here and there. My friends’ rent got increased by $250 one year. It’s definitely not cost-of-living adjustments.”

In August, Zillow.com estimated that the monthly rent across all apartments in the city was nearly $2,500. Three years prior, it was just over $2,000 a month. Increasing prices disproportionately affect young Bostonians, 60 percent of whom rent, according to the BRA.

“I pay a good amount of money even in Medford, which was unexpected,” said Jonathan Talit, 22. “I work for this company at the wharf and see a ton of new construction and developments going there. It seems like a lot of places are being built, but prices aren’t going down. In fact, they are going up.”

When Mattera graduated from Northeastern University eight years ago, she had two options: move home to Connecticut or stay in Boston and try to make it work. Mattera chose the latter. She worked at Starbucks for a while. She took jobs from temporary staffing agencies. She got laid off twice. “I’ve been in the same apartment for seven years and had that many jobs,” Mattera said.

She does what she can to not just get by, but to move forward. She shops at Market Basket, where she says she saves on food. She lives in Medford, where she saves on rent. She’s postponed thinking of homeownership or having a family, focusing instead on paying off her student loans. “I’ve thought about going home, but I also know there would be so many less things to do there,” Mattera said. “We’re stacked on top of each other here, but I’d rather have the access to the city.”

*Catherine Cloutier can be reached at [catherine.cloutier@globe.com](mailto:catherine.cloutier@globe.com). Follow her on Twitter at [@cmcloutier](http://twitter.com/cmcloutier).*
III. Boston Globe 10-9-14

Boston offers a plan to help colleges add dorms

By Matt Rocheleau, GLOBE CORRESPONDENT OCTOBER 09, 2014

Mayor Martin J. Walsh of Boston wants to cut in half the number of college students living off campus by 2030 and is calling on Boston colleges to collectively add 18,500 new dormitory beds to make that possible. The plan, part of the mayor’s new housing initiative, would encourage colleges to work with private developers to build the new facilities.

The proposal, greeted positively by officials at several colleges, comes amid increasing concern over shoddy, dangerous conditions common in off-campus student housing. The additional dorm space would give colleges greater oversight of students and ease the rapid growth of the student rental market in many neighborhoods.

Devin Quirk, director of operations at Boston’s Department of Neighborhood Development, said the city would facilitate partnerships between colleges and private developers to build new dorms, with one or more colleges agreeing to lease all or portions of the buildings.

Such agreements would save schools from having to put up large amounts of capital to construct the facilities, while giving developers a guarantee that the property would be rented. Privately developed dorms can also be taxed, unlike dorms built solely by colleges, which are classified as nonprofits, city officials said. The cost to build 18,500 new dorm beds in Boston would exceed $2.6 billion, according to the report. The city envisions 16,000 for undergraduates and 2,500 for graduate students.

Quirk said that during a pair of recent meetings with city leaders, local college presidents supported the ideas outlined in the report. “The big change here is the commitment from the universities to work with us on this issue,” he said. “It’s really a partnership.”

A series of Globe reports last spring uncovered illegal and dangerous living conditions, widespread overcrowding, and sanitary problems in neighborhoods popular with students. The city vowed to step up code enforcement over such issues. “My greatest concern is the health and safety of every young college student living off campus in overcrowded apartments” Walsh wrote. However, the city acknowledged it has yet to fulfill its promise to increase the number of inspectors. Some landlords and tenants have resisted efforts to follow city housing codes. Students say they are forced to share crowded apartments simply to afford the rent.

For years, residents and families — fed up with both rising rents and quality-of-life issues associated with college students, including loud parties and drunken vandalism — have demanded that colleges house and police more of their own students, particularly undergraduates. Last year, of the 136,000 students enrolled at four-year colleges and universities in Boston, an estimated 36,300 lived off campus, while 36,500 lived on
campus, the report said. The rest resided in a mix of on- and off-campus housing in other municipalities.

Some area colleges have a head start on increasing undergraduate housing, as more than 7,000 new undergraduate dorm beds are currently under construction or have preliminary city approval, including at Boston University, Northeastern University, and the University of Massachusetts Boston.

Quirk, of the city’s Department of Neighborhood Development, said he believes that having data to support the dorm-construction plan is a key driver for the enthusiasm of school leaders. “It’s a very data-driven plan,” he said. “We now have data we didn’t have before.” A key portion of that new information was provided recently by colleges.

After a fire at an off-campus apartment in Allston in April 2013 killed Binland Lee, a 22-year-old Boston University student, community activists called on colleges in Boston to release the addresses of their off-campus students to enable the city to detect overcrowded living conditions.

Most universities, citing privacy concerns, resisted until June, when Walsh met with college leaders, who largely agreed to disclose the students’ addresses. In August, the City Council formalized the rule, making it a legal requirement for schools to give the addresses and related data to city officials each semester.

Another reason more campus leaders seem to be on board with the city’s plan: a new mayoral administration. Walsh’s predecessor, Thomas M. Menino, sometimes clashed with leaders of local colleges as he pushed them to house more students on campus. “It’s refreshing that [Walsh] has brought universities into the conversation,” said John Nucci, a spokesman for Suffolk University, which houses 21 percent of its 5,800 undergraduates on its downtown campus. “He’s trying to establish a collaborative approach, and that’s a great idea.” “I think most universities will be on board with the general principles of the plan,” Nucci added.

Boston College houses 80 percent of its 9,000 undergraduates on campus, the highest percentage in the city. The school has plans to add another 810 dorm beds soon, which would push its on-campus housing rate to nearly 90 percent. “We support Mayor Walsh’s housing plan and look forward to working with him to meet our common goals,” campus spokesman Jack Dunn said.

Creating more student housing would free up some of Boston’s existing housing stock for working adults and families, Walsh’s report said. The city estimates that 16,000 new dorm beds would open up about 5,000 units to nonstudent renters.

City officials said they plan to work with neighborhood residents to establish, by 2015, a list of suitable locations and other criteria for new student housing.

*Matt Rocheleau can be reached at matthew.rocheleau@globe.com.*
III. *BOSTON GLOBE* 10-21-14

**Drop politics from student housing plans**

**By** Paul McMorrow  
| GLOBE COLUMNIST  | OCTOBER 21, 2014 |

THE CITY housing blueprint that Boston Mayor Marty Walsh released earlier this month wades into plenty of prickly areas, but none as prickly as the issue of student housing. Town-gown strains have weighed on Boston neighborhoods for several decades. Residents often chafe at students’ presence in Boston’s neighborhoods, but, from Brighton to Beacon Hill, recent attempts to house students on campus have become political minefields.

Walsh’s plan envisions shifting 16,000 undergraduate students into on-campus housing, and the mayor wants the move to happen within years, not decades. The student housing proposal is one of the more audacious ones Walsh has advanced since taking office in January. But a class of graduate students at Northeastern University solved the issue for him in one afternoon last week. They broke through because student housing in Boston isn’t really a physical problem. It’s a political problem.

That’s the dynamic that runs through Walsh’s new housing plan. It needs to end if the plan is to succeed.

Boston is now growing faster than at any time since the Great Depression. Walsh’s housing blueprint envisions the population reaching 700,000 by 2030. It’s a landmark figure, since Boston hasn’t had 700,000 residents since the 1950s. The city has been adding new residents so quickly lately that, if the current pace of growth keeps up, Boston could hit the 700,000 mark a decade sooner than the city’s housing plan anticipates.

But development hasn’t come close to catching up with the growth. And Boston is far behind what other cities are doing. Since 2010, Denver has built two-and-a-half times as many new housing units as Boston has, while Seattle has outbuilt us by three-and-a-half times. Even San Francisco, where housing woes are so acute that residents are demonstrating, has outrun the pace of housing construction here by thousands of units since 2010.

Walsh’s housing blueprint envisions Boston ratcheting up its pace of construction. It sets a goal of adding 53,000 new homes by 2030, with construction occurring across the income spectrum. Moving 16,000 undergraduates into on-campus housing, along with 2,500 graduate students, would free up another 5,000 neighborhood homes — many in Allston, Brighton, and the Fenway.
A group of architecture students at Northeastern is mocking up redevelopment schemes for Beacon Park Yard, the former CSX rail yard that lies between the campuses of Boston University and Harvard. The students’ work shows that, if all Boston did was replicate existing BU dorms across Beacon Park Yard, the city would be able to create 25,000 new dorm beds — thousands more than the target Walsh set this month.

The city obviously isn’t going to turn Beacon Park Yard into a student ghetto. But the Northeastern research speaks to the scale of what Boston housing plan is trying to tackle: If one vacant parcel in Allston could hold all dorm beds the city needs, with thousands of extras thrown in for good measure, then it shouldn’t be that hard to find other places for new dorms to go.

As tightly-packed as Boston is, it isn’t short on buildable land. But the city’s development politics don’t allow the city to take advantage of most of the free land it does have. The real issue is finding space unencumbered by crippling neighborhood politics.

Walsh’s housing plan doesn’t try to reinvent the wheel. It envisions more permissive zoning near transit stations. It’s receptive to bigger buildings, and buildings that don’t contain much parking. And it envisions making municipal approvals that should come easily actually come easily. Other cities, from Somerville to Chicago, have already tackled these issues, so Boston has recent successes to point to. But liberalizing development is a much bigger task in Boston than it is in a place like Chicago, because here, a deep resistance to change is baked into the way the city manages development.

Boston residents have become accustomed to City Hall subjecting new developments to narrow neighborhood politics; for the city, tough development fights have often been opportunities to extract goodies from developers. This dance was workable in Boston’s old slow-growth environment, but it isn’t anymore. Walsh won’t get close to his 53,000 new homes unless he recasts the politics of development. All the open land in the world won’t change that.

Paul McMorrow is an associate editor at Commonwealth Magazine. His column appears regularly in the Globe.
III. *Boston Globe* 10-9-14

**Walsh wants 53,000 more housing units in Boston by 2030**

By Casey Ross, | GLOBE STAFF   OCTOBER 09, 2014

- Share via e-mail

Boston needs to build 53,000 housing units by 2030 to keep pace with rapid population growth that is already increasing prices and squeezing out low- and middle-income residents, according to a city report. The report by Mayor Martin J. Walsh’s administration, previewed by city officials on Wednesday, calls for $21 billion in private and public construction that would increase the Boston’s overall housing stock by 20 percent over the next two decades.

During that period, the city’s population is expected to jump by 15 percent, to 709,000 people, according to the report. That would be Boston’s highest level since the 1950s, when large numbers of people began to leave the city for surrounding suburbs.

Walsh wants to limit further real estate price inflation by creating 20,000 units for middle-income residents, largely built by private developers. His plan would loosen zoning restrictions and provide financial incentives to encourage construction of taller buildings in outlying neighborhoods. It would offer developers tax incentives and other assistance to help reach that goal.

He also wants to increase annual city funding for low-income housing by 65 percent, to $51 million, and require developers of downtown luxury complexes to pay more and build affordable units at other locations. “This plan will allow people to buy homes and stay in their neighborhoods,” Walsh said, adding that he would seek to concentrate development around MBTA stations. “The quicker we create housing, the faster we stabilize the market.” The 131-page report is the mayor’s first comprehensive attempt to address one of Boston’s most vexing problems — a widening income divide undermining
Some of the proposals are similar to a smaller scale plan advanced by Thomas M. Menino, the former mayor, late in his administration.

In a press conference Wednesday, Walsh spoke about the issue in personal terms, describing the plight of a family forced to leave their home in the mayor’s own Dorchester neighborhood. “They got a letter that they’re being evicted because somebody bought their house,” he said. “You can’t blame the new owner for wanting to condo-ize the building, but we’re losing the stability of having that family there. They raised four kids there and where do they go? That’s why we’re doing this plan.”

Rising rents and home prices are affecting neighborhoods across the city. During the past year, for example, a middle-income household earning $80,000 a year could only afford 1.7 percent of homes on the market in Downtown Boston. That family could afford only 4.7 percent of homes in South Boston, a traditionally working class enclave.

The number of people living in the city with earnings at or below median income levels is expected to increase in coming years, with senior citizens making up a large part of the demand. According to the report, an additional 14,600 units will be needed for people over 65 earning less than $50,000 a year, a 52 percent increase from 2010. Prices have risen so much in some neighborhoods near downtown that Walsh and his aides concluded that building low- and middle-income housing there is no longer possible. Instead, they hope to spur construction in neighborhoods such as East Boston, Allston-Brighton, Dorchester, and Roxbury, where land is cheaper and more plentiful.

Part of the plan also includes construction of 16,000 units of student housing on campus by 2030, cutting by 50 percent the number of students living in private homes and freeing up that space for working individuals or families. The mayor said he would be receptive to private development proposals creating more housing for students by building student villages and other large complexes.
To produce more middle-income housing, the report proposes construction of large-scale housing complexes near MBTA stations, where developers could trim costs by building fewer parking spaces for residents. The city is also considering zoning incentives that would allow developers to construct taller buildings in select areas. Multiyear property tax breaks could also be added to make projects more profitable. “We all know there is demand” for middle-income housing, Walsh said. “If we can create a market in these different areas, then people are going to come and build.”

Without financial incentive, the mayor’s report concludes, developers will continue to focus on building luxury complexes that command the highest rents and offer the best returns. More than 8,000 new apartments are expected to be completed in Boston during the next three years, but the vast majority are expected to rent for $3,500 a month or more.

Housing specialists said city officials must move swiftly to streamline building regulations and allow developers to take advantage of Boston’s thriving economy. “We have to do this right and we have to do it big,” said Richard Taylor, director of the Center for Real Estate at Suffolk University. “Boston is a highly sought-after market by developers, but the complaints are that land is too expensive and the process is too complicated. Those are the areas we need to chip away at.”

The report proposes to help speed the city’s development review process, particularly for builders proposing new housing on small, privately owned parcels. That could help spur production in densely-packed areas, where building proposals often face long delays.

Some of the region’s largest housing builders are already increasing their investments in Boston. The city gained about 28,000 new residents between 2000 and 2010, then added the same amount over the following three years to bring the city’s population to 646,000.

“There is movement by a lot of people into great 24-hour cities, and Boston is certainly one of those,” said Michael Roberts, senior vice president for AvalonBay Communities Inc. Historically, the company has focused its investment in suburban areas, but it is now building more than 1,100 apartments in Boston.

While those units are targeted to wealthier renters, Roberts said the company “would be very interested in finding a way to make middle-income housing work.”

“The capital is there and the interest in that market is there,” he said. “Having a clear program to get us there is the key.”
Commonwealth Housing Task Force Quarterly Report
December 31, 2014
Page 40

Casey Ross can be reached at cross@globe.com.
By Scott Van Voorhis, Banker & Tradesman Columnist

No need to slog through Boston Mayor Thomas Menino’s ghost-written autobiography, now piling up in a bookstore near you, to grasp the legacy of Boston’s builder-in-chief – just take a look at all the shiny new towers on the Hub’s skyline, many of them luxury towers with multimillion-dollar condos and sky-high rents.

But through a combination of virtue and economic necessity, current Mayor Marty Walsh, with the release of his big 2030 housing plan, has staked his legacy on a much different and potentially riskier path. With a disinterest verging on disdain for all those luxury towers, Walsh has sketched out an ambitious plan to spur housing construction for the increasingly beleaguered middle class, with plans to build or free up 20,000 badly needed homes, condos and apartments.

And Walsh is not looking to require downtown luxury tower builders to set aside “affordable units,” a popular tactic during the Menino years and as effective as smearing lipstick on a pig. Instead, he is looking to spur construction in the city’s often insular neighborhoods, a doubly challenging prospect given that Boston’s neighborhoods are every bit as NIMBY as the often roundly criticized, housing-phobic suburbs.

It’s easy to be a skeptic here, but bet against Walsh at your peril. From his emergence more than a year ago as a dark-horse candidate to his election as mayor, Walsh has confounded his critics by refusing to live up to various stereotypes and instead forging his own path.

Walsh is certainly up to the challenge, but he’s got his work cut out for him. “We will get pushback, sure, but not as much as people think,” Walsh said, rather optimistically, in an interview after rolling out his 2030 housing plan.

An Honest Appraisal
First off, Walsh scores points right off the bat by not only recognizing how middle-class homeowners and buyers are getting squeezed, but looking at it in a serious way.

The 2030 report provides a clear and in-depth look at Boston’s housing challenges, with the Metropolitan Area Planning Council, the respected planning group led by former Lt. Gov. [candidate] Marc Draisen, powering the research. It doesn’t sugarcoat the problems out there, with a revealing graphic showing that even families pulling down $100,000 struggle to find anything within their price range in several neighborhoods.
"In Dorchester, the price of housing is going to $600,000 to $700,000 for a single-family," Walsh said of the neighborhood he grew up in and lives in today. He said report is about how "we stabilize the middle class, and how do we give them the option to stay in the city?" The report attempts something few, if any, other mayors have tried to do – offering up a potential road map for construction of middle-income units.

Sounds easier than it actually is, given there is no ready set of state or federal programs, which are often geared towards helping low-income residents. Walsh wants to entice developers with tax incentives, low-cost city land, and a streamlined approval process.

Menino certainly spouted off a lot about “affordable housing,” but that is essentially code for “subsidized” housing that is often unavailable to middle-class buyers. Too often, the message from Menino was not about the dire and growing crisis of housing unaffordability, but rather a simple declaration of “look at all I’m doing here!” Sadly, the old mayor’s rhetoric was undercut at times by quiet side deals in which favored developers were released from the obligation of building the units in the first place, something I am doubtful made it into his not-exactly tell-all tome.

The housing crisis didn’t show up when Walsh took office, and he gets credit for tackling it full on. But speaking honestly about a problem and actually taking effective action to deal with it are two separate things. And this is where the new mayor’s next big challenge can be found.

**Housing Haters**

Let’s be real here. Walsh faces an uphill battle getting his plans through neighborhood opposition, with intense NIMBY sentiment in many Boston neighborhoods. There is no a major project in Boston that hasn’t spawned a group of die-hard opponents, from Harvard’s massive Allston expansion to plans for a 52-story tower at Copley Place, which critics contend will cast a long shadow over bejeweled Copley Square. Even little projects – plans to add a dozen or two new condos or apartments – can spawn equally nasty, and politically draining, NIMBY spats as well.

No sooner had Walsh released his plan than I got a call from “Bob,” a Dorchester homeowner who has spent years trying to develop an adjacent lot he owns into badly needed housing. He started off with plans for 16 units and had been forced to cut that number down. The last straw was when the local civic association got into the act, demanding he build no more than eight units. Now Bob is thinking of bailing on the whole project, and the neighborhood as well.

In South Boston, a proposal to convert the now empty Gate of Heaven School on East Fourth Street into 31 condos has sparked an uproar. Some in Southie are even pushing for a building moratorium.

Walsh, for what it’s worth, has hardly been a housing zealot when confronted with neighborhood residents angry over plans for new housing, preferring to slow things down and find a way to work things out. Maybe that’s a bad sign; I don’t know. But maybe it’s also a signal that Walsh knows
how to pick and choose his battles. Even as he shows caution on projects like Gate of Heaven, the new mayor, in a recent interview, was speaking favorably of the work of a task force pointing to the potential for several thousand new condos and apartments in one of Dorchester’s most overlooked commercial corridor.

The Morrissey Boulevard corridor is packed with potential, with The Boston Globe preparing to sell off its long-time headquarters and the University of Massachusetts Boston still pondering uses for the sprawling Bayside Expo center site. The Red Line is just down the street.

Walsh and city housing chief Sheila Dillon, head of the Department of Neighborhood Development, have made it clear they are looking at focusing on a number of transit-orientated sites with big development potential around the city, though we will have to wait until early next year to get a full list.

Tellingly, Walsh noted that Steve Samuels, the mega Fenway developer who also built the South Bay shopping center just down Morrissey from the Globe, is among those developers “pumped up” about building middle class housing.

Don’t Bet Against Him
Walsh has been written off repeatedly by the “wiser” among us from the time he kicked off his campaign for mayor just 18 months ago. The former head of the Boston Building Trades Council, Walsh was initially pegged as some sort of union hack who was supposedly sending shivers up the spine of Boston’s business leaders. No matter that one of his core constituencies – union hard hats – have a vested interest in seeing big projects get approved, and in Boston’s business community to keep building them.

Once elected, Walsh faced the rub that he would be some sort of union boy toy, ready to empty the city coffers on lavish pay packages for public employees. Then he negotiated a fairly decent deal with Boston’s firefighters, winning some qualified praise from the Boston Municipal Research Bureau. In fact, Walsh, with his combative stance against Steve Wynn’s casino proposal – obviously a union favorite given the thousands of jobs it would create – is clearly growing fast into his new role as mayor. And as Walsh pushes forward with his housing plans, here’s hoping for more such surprises ahead.

Email: sbvanvoorhis@hotmail.com
III. *Boston Globe* 10-11-14

**Will Walsh fight hard for housing?**

*By Lawrence Harmon*  
| GLOBE COLUMNIST | OCTOBER 11, 2014 |

DURING HIS inaugural address in 2010, former Boston Mayor Thomas Menino envisioned a new Boston teeming with young techies working in industry clusters and living in semi-communal housing — Geekville, you might say. But the elderly, it turns out, are the fastest growing demographic group in Boston, according to a major housing report released this week by Boston Mayor Martin Walsh. Geezerville may turn out to be a more accurate moniker for Boston in the near future.

By 2030, according to the report, the city’s senior set will increase by 22,400 households. People of retirement age will account for one in five Boston households. And the bulk of new retirees will toss aside the Florida condo brochures and choose to “age in place.”

It’s great that seniors feel so comfortable here. But this is a potential housing nightmare for middle-income families who are already having trouble gaining a foothold in Boston. Increasingly, they will find themselves squeezed on one side by seniors who occupy large homes and on the other side by 20,000 undergraduates who drive up rents by sharing off-campus apartments. The middle class in this city can’t buy a break.

And to get one, they’ll have to depend on courage that they haven’t yet seen from Mayor Walsh.

Walsh’s administration understands the problem. The city’s population is on track to exceed 700,000 for the first time since the 1950s, according to the study. But unlike in those simpler times, Boston in 2030 won’t be chock-a-block with families of eight living in three-bedroom apartments. With fewer people inhabiting each unit, the pressure on the housing stock will grow even greater.

To cope, the administration has set the goal of adding 53,000 housing units by 2030. In the introduction to the 131-page report, “Housing a Changing City: Boston 2030,” Walsh unambiguously accepts the challenge of putting the new housing plan into action. That’s huge. Until now, no one in the city could figure out where the mayor actually stood on housing. He clearly understands the wisdom of building higher, denser housing developments, especially along public transit lines. And his many friends in the building trades are urging him forward.

Yet Walsh seems to freeze when confronted by NIMBY-minded residents who reflexively oppose any new construction.

If the mayor is serious, we should soon see him blasting through the NIMBY barricades.

Last spring, Walsh became nervous about the height of a modest, 13-unit condo project proposed for a lot across the street from the Savin Hill T station. It’s all of three stories. Now, the developer is on the verge of giving up after enduring the inescapable “community process.”

For months, Walsh was eerily quiet on a sensible proposal to build a 27-unit apartment building adjacent to the Fairmount commuter rail station in Hyde Park. Neighbors want to kill that development, too. But it is slowly and painfully winding its way through the approval process now.
that the mayor seems slightly more comfortable with the site. At this pace, the 53,000 units of new housing will take forever. And again, it is the middle class that will suffer most.

The high cost of land and labor here practically forces developers to build luxury units or tap into government funds available for the construction of subsidized housing for the poor. Meanwhile, families earning a respectable income of $80,000 can only afford the bottom quarter of the homeownership market in Boston. And while there are a lot of new apartments in the pipeline, they are likely to rent for upwards of $3,500.

The Walsh administration’s housing plan provides good data, detailed projections, and smart analysis. And it offers strategies to solve the problem: zoning relief in locations with good access to transit; temporary relief from property taxes in special middle-income development areas; market incentives to develop 3,500 new units of senior housing as a way for the elderly to downsize; and the creation of 16,000 new undergraduate dorm beds along with off-campus student villages.

But how willing is Walsh to fight this battle? If the mayor is serious, we should soon see him blasting through the NIMBY barricades and convincing his buddies in the building trades to bring down construction costs on homes for middle class families earning in the $50,000 to $100,000 range.

Walsh needs to shout his support for an aggressive housing policy from Boston’s rooftops. No more padding softly around the living room.

*Lawrence Harmon can be reached at harmon@globe.com*
Boston Wants To Grow, but Tough Obstacles Stand In Its Way
By Colleen M. Sullivan, Banker & Tradesman Staff

Boston's burgeoning growth makes today an exciting era for the city - but judging by a panel discussion among housing experts this morning, it's not at all clear how the city can tackle longstanding obstacles to accomplish its lofty housing goals.

Boston is projected to grow to more than 700,000 residents in the next 15 years, a number it hasn't seen since the 1950s, and Mayor Marty Walsh's new housing plan calls for an additional 53,000 units to be built to accommodate the growth, many of them aimed at middle-class residents. Increasing the density of development in Boston's existing neighborhood will be a key part of successfully integrating that growth, the panel agreed. The panel included developer Kenan Bigby of Trinity Financial; Sheila Dillon, director of the Boston's Department of Neighborhood Development; architect Frederick Kramer of ADD Inc.; and Paul McMorrow, real estate columnist for The Boston Globe and associate editor of CommonWealth Magazine.

"It's really about, how do we reshape and repurpose the neighborhoods to reshape this new growth that we're seeing? We've had more growth in this last decade than we'd had in the previous three. And the slow-growth method that we use to send projects through the pipeline doesn't work anymore," said McMorrow.

Bigby pointed to several key elements of successful projects his group has worked on that have allowed them to build more densely in existing neighborhoods: Finding transit-adjacent sites that allow developers to cut down on costly parking; building along existing busy corridors where larger buildings don't seem out of place; re-using former industrial or commercial sites with existing infrastructure to support bigger buildings; and including mixed-use features like ground floor retail or office space, which provide amenities to the entire neighborhood, helping to garner community support. Finding a site that ticks off all the boxes can be tough, however, and mixed-use projects generally require more complex financing packages, as different elements of the project take differing amounts of time to come online. That can mean working with city and state partners to make them viable, Bigby said.
Dillon pointed out that the city is currently working with the MBTA and the Massachusetts Department of Transit to help identify underdeveloped, transit-adjacent parcels that would be ripe for development.

But there remain many obvious obstacles to increasing density, and few obvious solutions. Boston's outdated zoning code and slow slog of development approvals make it too tough to get new projects done, while the city's outdated infrastructure makes it expensive.

But one of McMorrow's suggestions - a wholesale reform of the city's zoning, especially near transit - was met with demurrals from Dillon and Bigby, who said that in their experience developers prefer to tackle acquiring potential zoning variances on a project-by-project basis.

When a neighborhood spends years coming to consensus on a development plan, it can actually make it harder for developers to get projects done, Bigby explained.

"When they've come up with a plan, they want you to stick to it," he said, which can be difficult for developers, who need to be flexible with project specs in order to respond to shifts in the climate for financing over the many months or years it can take to complete a big development.

And while building projects in places where existing infrastructure can support density is very useful, decades of neglect and under-funding often mean that installing any new development requires extensive, expensive upgrades to sewer tie-ins, utilities and other nuts and bolts - upgrades for which little federal or state funding is available.

"The days of the government being able to fund the things we need to do are done, and it can't all be on the backs of private developers," said Kramer. "I don't have an answer on the funding issue, but we're not anywhere close to solving that, short-term or long-term."

The event was sponsored by the Greater Boston Real Estate Board and Suffolk University and held at the Modern Theater. NECN's Peter Howe acted as moderator.
Hey Housers, Health Folks Want to Talk to You Too!

Posted by Sarah Ellis on October 31, 2014 and reprinted by ShelterForce 11-4-14

People in the affordable housing field have grown increasingly interested in talking about healthcare. Concepts like “housing as a platform” for health outcomes have become part of our professional lexicon and panel topics at our conferences. We talk a lot about the barriers to progress in aligning health and housing policy in this country. We also talk about integrating service delivery and how to cut through the red tape and silos that divide health and housing systems today.

It turns out that health policy advocates are just as eager to talk about housing as we are to talk about healthcare.

I witnessed this firsthand at the annual National Association of States United for Aging and Disabilities (NASUAD) conference on home and community based services, which brought state health policy staff, practitioners, and advocates together to talk about the latest in community-based healthcare policy.

As a housing policy person working for a housing organization—the Housing Partnership Network (HPN), a network of the country's strongest housing nonprofits—I wasn't sure what to expect from a conference held by and intended for health policymakers and professionals. However, after listening to panelists from the healthcare field talk about housing as a key factor in the future of their work, it became clear to me that we’re not the only ones who are working hard to connect housing and health in our communities.

Housing and Healthcare Spend a Lot of Time Talking About Each Other

It shouldn't be news to anyone that housing and health are inextricably linked; indeed, we can point to a growing body of evidence proving that safe, stable, and affordable housing is a key determinant of health and well-being. In the housing field, we've learned that our mainstay public programs like Section 8 housing vouchers, project-based Section 8 housing, supportive housing for the homeless, low income housing tax credits, Section 202 housing funding for seniors, and Section 811 housing for people with disabilities all work best when they are supplemented with health, wellness, and childcare services. At the NASUAD conference, I learned that our colleagues in the healthcare field are also talking about housing and healthcare, often in surprisingly parallel ways.

Historically, Medicaid and Medicare funded long-term care for people with chronic conditions and disabilities have been institution-based—think nursing homes and hospices. Over the past 20 years, however, this care has gradually shifted toward services based in communities. This movement has been driven by a few different factors. For one, many disability advocates have made equity and rights-based arguments promoting community living for people with disabilities instead of segregation in institutions. They have also pointed to cost-effectiveness, since community-based services cost less than institutional care. The shift to community-based, person-centered (as opposed to regimented or one-size-fits-all) care for people with chronic needs was
reinforced by the 1999 Supreme Court Olmstead decision, which cemented the right of people with disabilities to receive supports in the most integrated setting possible.

Amidst this change, health policymakers have discovered that the biggest obstacle to providing long-term care in communities is a persistent shortage of affordable housing—something we’re all too familiar with in the housing field. Currently, rent and cost of living expenses are eligible for Medicaid coverage when a person lives in an institution, but not when they live at home or in their own apartment. This imbalance makes independent living all but out of reach for people with disabilities or the frail elderly, who for the most part earn extremely low incomes or live on limited Social Security payments.

There’s broad acknowledgement that we need to expand the supply of affordable housing with supportive services, but less consensus about how to do it and who should be responsible—especially when it comes to funding and resources.

**Now, We’re Finally Talking to Each Other**

Just in the last few years, we’ve seen unprecedented collaboration between HUD and the Department of Health and Human Services, two agencies that until recently weren’t known for tackling issues beyond their immediate reach, in part due to the Obama Administration declaring 2010 the “Year of Community Living.” Today, the agencies are working together to initiate collaborative projects between state health and housing agencies.

One of these projects has involved reforming [HUD’s 811 program](https://www.hud.gov/etc/docs/811program.pdf), which originally helped housing developers with construction and ongoing funding of housing units for people with disabilities. The reformed 811 program requires state health and housing agencies to collaborate on a big-picture plan for coordinating housing and services for people with disabilities—a major step toward creating a more effective health and housing infrastructure in communities. What’s more, the 811 program isn’t the only major collaborative project—HUD and HHS have also worked together on programs like Money Follows the Person, which helps pay for housing and services for people transitioning out of institutions and nationwide meetings with state housing, health, and services officials.

At the NASUAD conference, I heard from state health policymakers and professionals working with these programs on a day-to-day basis. They were all in agreement: the programs are succeeding at connecting health and housing agencies in the policymaking and implementation process, in many cases for the very first time. They all agreed that collaboration is most effective when there’s a specific program or policy to work with, and that learning the language of one another’s programs is a key step.

HPN’s high-capacity nonprofit members are also on the front lines of the effort to connect health and housing in communities. In San Francisco, Mercy Housing California worked with the city’s health and housing agencies to develop the [Mission Creek Senior Community](https://www.missioncreekseniorcommunity.com/), which provides affordable apartments and supports to former residents of the city’s shelters and public nursing homes. Also in San Francisco, the Tenderloin Neighborhood Development Corporation is working with state and local health agencies to create supportive housing with health services for formerly homeless individuals. Finally, National Church Residences has pioneered an innovative approach to housing seniors in Columbus, Ohio who would otherwise be in nursing homes, using Medicaid waivers to pay for services and supports in community-based homes.
There's Still a Lot of Work to Do

For all the progress we’re seeing, there’s still a long way to go before we see deep integration of our health and housing systems within communities. This is partly due to the independent nature of our delivery systems for social services—from the federal government down to local communities, our housing and health systems were developed separately and have evolved separately. There are still strong voices in both systems that believe this is how things ought to be—housing agencies should create housing and health agencies should provide healthcare, and never the twain shall meet. It is clear that bringing the two systems together is a long process that will need to withstand political headwinds and shifting priorities.

That said, the stage is being set for major changes in our healthcare system, and making those changes sustainable and successful will require a renewed focus on affordable housing for families, seniors, and people with disabilities. Policymakers, professionals, and advocates from the housing and health fields can advance this agenda by seeking opportunities to share knowledge and collaborate, at our meetings, in our conferences, and through our advocacy. With many small moves of the dial, we can bring our communities closer together.

(Photo credit: Mission Creek Senior Community by Mercy Housing)

ABOUT THE AUTHOR more »
Sarah Ellis is a policy and communications associate at the Housing Partnership Network, a member-driven organization comprised of 100 entrepreneurial nonprofits that operate all across the country. Prior to joining HPN, Sarah worked as a policy analyst in the Mortgage Markets division at the Consumer Financial Protection Bureau. Sarah has a BA from the University of Toronto and a Master in Public Policy degree from the John F. Kennedy School of Government at Harvard.
III. *Banker and Tradesman*, Sunday, October 26, 2014

**A Plea for Change on the Hill**  
**Zoning Regulations Artificially Depressing Housing Construction,**  
*By Scott Van Voorhis, Banker & Tradesman Columnist*

The Bay State’s housing market is in deep trouble. But the seemingly unlikely combination of basic capitalism, housing activists and zoning reform just might save it – if we’ll give it a chance, that is.

For decades now, Massachusetts has been a housing market laggard. Year-in, year-out, we simply build far too few homes, condos and apartments to meet demand in a university- and research-rich state that has become a magnet for a bevy of cutting-edge industries. Then we act all puzzled as to why real estate prices just keep going up, year-in and year-out, pushing up towards ever more unsustainable heights and slowly putting the squeeze on everyone, from the poor and middle class right up to even the moderately well off.

Sure, we are seeing a luxury condo tower boom in downtown Boston, but nowhere close to the tens of thousands of new homes of all types needed to satiate decades of pent-up demand. Beyond the gilded towers, middle-class buyers have been all but priced out of half of Boston’s neighborhoods, a recent report by Boston Mayor Martin Walsh found. In the suburbs, the outlook isn’t much better, with modest homes in a growing number of communities being torn down and replaced by much larger and more expensive abodes.

By contrast, more modestly priced homes face a gauntlet of local opposition and red tape, noted Clark Ziegler, executive director of the Massachusetts Housing Partnership, who is gearing up for another push at the State House to reform of local zoning rules. “Literally, we are right back to where we were before the recession, with single-family homes being bid up,” he said. “We are back to the same problems we last saw in 2004 and 2005.”

It’s really no mystery why this is the case. Far too many cities and towns see new housing beyond the scattered McMansion or two as the advance guard of an unwelcome invasion of tax-dollar-gobbling school kids. Worse yet, not all of these newcomers are likely to be white and wealthy, either.

So towns have made it all but impossible to build new housing, with a crazy quilt of rules and reviews that profess lofty motives, but whose real intent is to stop housing development in its tracks and keep everything just as it is now, and has been for years. There are few towns and cities in Eastern Massachusetts – or for that matter, the state – that allow developers to build new condos or apartments by right. That means filing your proposal with the planning board, getting the once over, and then pulling the building permit.
Regulatory Fiefdoms

In many parts of the country, if you want to build a new apartment or condo building, you file your proposal with the local planning board, get the once-over, and pull a building permit. That is how a free market is supposed to work, with developers, like other business people, able to scout out opportunities and capitalize on them, earning a profit and filling a larger community need in the process.

But that’s a rarity here. Roughly 10 percent of towns in Eastern Massachusetts actually prohibit multifamily housing altogether, according to the Fair Housing Center of Greater Boston. The majority of cities and towns, while not actually banning new apartments and condos, require developers to go through torturous special permitting reviews that can take years, if the developer doesn’t bail first.

In some cases, developers have to win a two-thirds vote in Town Meeting, an almost impossible bar to clear if there is any opposition, and, in NIMBY Massachusetts, that’s almost always the case. It’s a system that is easily and often hijacked by a few determined cranks, with everyone else paying the price in ever-higher home and condo prices and soaring rents.

“You cannot not have young people; you cannot freeze your community in time,” MHP’s Ziegler said. “We have a big, big problem.” Fact is, when it comes to housing, or at least the construction and development of it, what we have now in Massachusetts is far from a free market – and it’s hard to spot the capitalism in it amid the dense forest of regulations.

Instead, we have dozens, if not hundreds, of little regulatory fiefdoms, dedicated to micro-reviewing proposals for new apartments or condos with the kind of scrutiny reserved at the federal or state level for hazardous waste dumps, prisons or casinos. During the decade ending in 2013, more than 200 towns across the state never permitted a single apartment or condo project of five units or more, according to MHP.

Yet much of our housing woes could be substantially solved if we simply let the forces of supply and demand work by letting builders do their job and put up new housing – capitalism 101. Certainly, the demand is there. The bidding wars over relatively modest homes that we have been seeing across Greater Boston attests to that. Despite a recent bump in listings, the amount of homes and condos on the market remains at historic lows.

But all those artificial barriers in towns and communities across the state will have to go before builders can truly do their job. “I think in general if the zoning were simply allowed to be more responsive to market demand, the impact would be extraordinary,” Ziegler said.
Discriminatory Practices

While there are a few individual success stories out there as some communities embrace state incentives and open up their doors to a project or two, this isn’t really a battle that can be won town by town. The good news is that the Legislature, working with a like-minded governor, has the power to tear down these artificial barriers. And, after years of legislative setbacks, Ziegler and other housing activists are gearing up to launch yet another push on Beacon Hill for zoning reform to start bringing down the myriad of local barriers to new housing.

However, the bad news is that zoning reform has had a rough ride in the Legislature, with lawmakers leery of angering local officials upon whose support they rely on. The last proposal didn’t even require communities to change their zoning – it instead would have allowed towns and cities to opt into a more flexible zoning system and designate sites that could be used for apartment and condo construction.

Change needs to come from the top down, with sweeping zoning reform that will prevent cities and towns from effectively walling themselves off from all new housing. The short-term prospects for effective change aren’t good, with nary a word about housing from the two leading candidates for governor and with the scandal-plagued Legislature hardly a profile in political courage.

But the long-term prospects are better. The current system now is terribly unjust, with zoning barriers being used in what are effectively discriminatory ways, to keep out a broad segment of society – families with children – in ways that also have at times distinct racial undertones.

It is also a threat to the viability of the Bay State economy, as the state’s workforce gets slowly forced out. And as the affordability crisis deepens, true zoning reform will become impossible to ignore, if not this year, then the next.

Email: sbvanvoorhis@hotmail.com
III. Banker and Tradesman, Sunday, November 16, 2014

Is The Cure Worse than the Disease?
Pros and Cons of Zoning Reform, By Steve Adams, Banker & Tradesman Staff

The 1975 law that governs how housing is built in Massachusetts is a holdover from an era when predominant development patterns consisted of Colonials and split-levels in the suburbs. Attempts to overhaul Chapter 40A, however, have gained little traction on Beacon Hill in the past decade despite widespread acknowledgement of its flaws. Smart-growth advocates say their repeated attempts at zoning reform are an antidote to sprawl and a formula for accelerated housing production in a state that sorely needs more of it.

Real estate developers argue the reform proposals are even worse, and would discourage home construction through overregulation and higher costs. Communities could impose new conditions that would make development more difficult and expensive, opponents say. “Builders and property owners aren’t going to give up the few protections they have in exchange for a promise that municipalities will do the right thing,” said Benjamin Fierro, a Boston attorney who represents the Home Builders and Remodelers Association of Massachusetts.

Last year’s bill, co-sponsored by Sen. Daniel Wolf and Rep. Stephen Kulik, contained several provisions that were anathema to developers:

Inclusionary zoning: Communities could require that all residential developments contain a percentage of affordable units, or contribute to a fund promoting affordable housing. Unlike the existing Chapter 40B, which remains popular with developers because they can build high-density multifamily projects, there would be no “density bonus” in exchange for the affordability requirement. Developers say it would just raise the cost of market-rate homes to subsidize the price-restricted ones.

Elimination of “approval not required” lots: Developers have the right to build homes on a public way as long as the lot meets minimum frontage and local lot regulations. Smart-growth advocates say the “ANR” regulation is a recipe for sprawl in an age when communities should be encouraging cluster-style developments. The legislation would have eliminated ANR lots and required developers to apply for “minor subdivisions” subject to approval by planning boards.

New impact fees: Currently, communities can require developers to pay fees to offset new infrastructure costs generated by their projects, such as increased sewer capacity. The bill would have allowed impact fees for new categories such as open space, parkland and recreation facilities. Towns also could require up to 5 percent of land in subdivisions be set aside for parkland.

Locking in zoning: Currently, once a preliminary subdivision plan is filed, the parcel’s existing zoning is frozen for eight years and not affected by amendments or moratoriums. Under zoning reform, subdivisions only would be protected from zoning changes if they were filed before the first public notice of a proposed zoning amendment, rather than its final approval.
Real estate sources say the ability to lock in zoning for years is important, because it gives developers the flexibility to ride out the ups and downs of the market. But the process is sometimes abused by developers who submit vague preliminary plans to preserve their rights, said Andre Leroux, executive director of the Massachusetts Smart Growth Alliance and one of the principal authors of the bill. Municipalities, for their part, sometimes try to rezone land after a preliminary plan is filed to block a controversial development. “There’s an element of gamesmanship involved, and it’s not a rational system,” Leroux said.

The bill also would make it harder for commercial developers to change plans after they’re filed, drawing the opposition of the Needham-based industry group NAIOP Massachusetts. “If a proposed project is initially designed to serve as a retail use and retail demand evaporates, a developer needs to have the flexibility to change its plan. This bill would eliminate a developer’s ability to respond to a changing market,” NAIOP Senior Vice President Tamara Small wrote in a letter to legislative leaders this summer.

Builders argue that local land-use boards have a built-in bias against development because of pressure from existing residents and abutters, and predict the reform proposals would give communities even more tools to discourage growth. “These regulations raise the cost of housing and raise the barriers of entry, so only the national developers can afford the lawyers and the consultants and they’re not going to be building the entry-level housing,” Fierro said. “It’s the Legislature’s job to be concerned with the commonwealth and the broader impacts on our competitiveness when individual communities erect barriers.”

**Dispute Resolution Not Addressed**

Gary Lilienthal has seen both sides of the picture as a real estate attorney representing developers, as well as serving as a long-time member of local land-use boards. Zoning reform, he said, attempts to add new mechanisms to achieve goals that are already attainable through programs such as Chapter 40R, which gives state aid to communities that approve high-density development. What the reforms don’t address, Lilienthal said, are new dispute resolution options. Legal challenges of approvals can tie projects up in court for years, spotlighting the need for mandatory arbitration or a new zoning court to hear appeals. “The economy and construction market is so fragile in timing, and a lot of these lawsuits are started as leverage for a payout,” said Lilienthal, an attorney at Bernkopf Goodman in Boston. “What screams to be fixed is the appeal process.”

The Smart Growth Alliance’s Leroux said a bill containing many of the same elements as this year’s is expected to be filed again by Dec. 31 by Wolf and Kulik. So far there’s been no discussion between the real estate industry and planners about working together on a compromise bill. “I have not heard from the Smart Growth Alliance,” said Small, the NAIOP executive. “Our position is we support whatever moves forward something that advances production of housing, and to date we don’t feel those proposals have gotten there,” Leroux said the Smart Growth Alliance repeatedly has tried to engage the real estate lobby without success. “I’m hoping this session they will come to the table with some language that we can work with them on,” he said.

Email: sadams@thewarrengroup.com
MassDevelopment Names 10 Gateway Cities for Transformative Development Initiative
MassDevelopment has selected 10 Gateway Cities to receive enhanced development assistant through the state economic agency's Transformative Development Initiative (TDI).

The TDI Districts will receive enhanced technical assistance, real-estate services and equity investments in real estate to support local visions for redevelopment, and to catalyze and leverage investments and economic activities. Those districts are as follows: Brockton, Haverhill, Holyoke, Lynn, New Bedford, Peabody, Pittsfield, Revere, Springfield and Worcester. Two additional Gateway Cities, Everett and Malden, will receive directed regional planning and implementation assistance to advance their district visions.

"MassDevelopment is thrilled with the redevelopment potential of the inaugural districts that will receive assistance through the Transformative Development Initiative," MassDevelopment President and CEO Marty Jones said in a statement. "These TDI Districts represent the great diversity - in culture, geography and history - of Gateway Cities, and MassDevelopment looks forward to helping to catalyze the realization of as many of their visions as possible."

In early 2015, after in-depth site visits, three of the 10 TDI Districts in Development will be matched with TDI fellows for three-year terms. The fellows will provide on-the-ground, district-specific planning and implementation expertise.

Twenty-six of the Gateway Cities had their submissions from the 2014 Call for Districts reviewed by an outside committee of experts to select cities for the initial pilot program. The committee considered the quality of the submission, the vision for the district, the district type (downtown, residential and industrial), geographic distribution and the opportunity for program impact in the early years of the program. The TDI District Review Committee provided a recommendation to the MassDevelopment Board of Directors, which approved the Districts at its Dec. 11 board meeting.

Gateway Cities that were not designated this pilot year are eligible and encouraged to submit for future rounds. MassDevelopment will compile a pipeline of potential equity investments in all districts submitted to gauge development needs for future funding. All 26 Gateway Cities, in addition to all other cities and towns, will continue to receive and be eligible for typical MassDevelopment services.

TDI provides resources for all Gateway Cities with Cowork grants for innovative collaborative workspaces, and small Placemaking grants of $1,000 to $10,000 for small-scale projects supportive of district visions to help build community identity while supporting improvement of public spaces, including pocket parks, pop-up stores, community gardens and farmers’ markets.
Appendix IV. Expanding Opportunities, Public Housing, ULI, and Legal, December, 2014

*Boston Globe* 12/3/14
Diversity

**What are Boston’s biggest barriers to inclusion?**

*Community and nonprofit leaders, academics, activists, and others discuss problems and priorities.*

DECEMBER 03, 2014

**Peniel E. Joseph**, *Professor of history, Tufts, and author, “Waiting ‘til the Midnight Hour: A Narrative History of Black Power in America”*

The biggest barrier to stability is lack of dialogue along race and class lines. The City of Boston and state of Massachusetts should bring people together, across fields and disciplines, to tackle issues of access, opportunity, and deep democracy. We could do this through an arts, humanities, and science and technology initiative that would sponsor forums at various schools and in diverse communities. Such events are all about follow-through. Initiatives sponsoring research-driven dialogue, public forums, and symposia on these issues would go a long way toward ensuring access, equality, and inclusion for all residents.

**Giles Li**, *Executive director, Boston Chinatown Neighborhood Center*

Boston Public Schools must articulate a strategy for engaging families, especially working-class families, immigrant families, and families of color. Nine out of ten BPS students are of color, four out of five are low-income, one out of two speaks a language other than English at home. Boston is becoming more and more diverse by the day, and you can see it demonstrated in our classrooms. Boston can be a national leader by investing in partnerships between district, schools, teachers, and families. But everybody needs to be on the same page to pull it off.

**Marty Walsh**, *Mayor, City of Boston*

We’ve taken some hard looks at the current status quo in Boston . . . and begun to quantify the opportunity gaps and taken even stronger steps toward bridging that divide. Through our work with President Obama on the My Brother’s Keeper initiative, to hiring the city’s first chief diversity officer, to building and strengthening relationships with community groups to form a diversity and inclusion team, we have taken great steps forward, with an exciting path ahead. Boston needs to be a city that works for every resident.

**Valerie Fletcher**, *Executive director, Institute for Human Centered Design*

The Census Bureau identifies 57 million Americans not in nursing homes as disabled; only 3.6 million use wheelchairs. Then there is the huge and growing population of elderly. These people don’t want to be isolated. The city should think about making it
easier for people to get out, looking at seats with arms so people can push themselves up, the length of crossing lights, surface conditions of roads and sidewalks, and way-finding, installing more signage and improving Web design so people can plan their trips better. Functional limitations have become an ordinary reality, and we have to wake people up that we share this and can’t make it fall on the next generation.

**The Rev. Laura Everett**, Executive director, Massachusetts Council of Churches

We need to start shifting minds and attitudes. As someone who has chosen to make Boston my home, I struggle with the divide between people with deep roots here and new residents trying to find their way. I propose a shift in attitude. Let’s stop asking “Are you originally from here?” It often seems laced with race, class, and ethnic presumptions about authenticity. Instead, let’s ask people to tell us about their Boston or Lowell or Holyoke and invite conversation about the glorious internal diversity of our cities and towns.

**Monica Grewal**, Partner and cochairwoman, diversity committee, Wilmer Cutler Pickering Hale and Dorr LLP

Especially in the professional ecosystem, inclusivity is a challenge because of a limited number of role models and change agents. We have an advantage because Massachusetts is renowned for its concentration of higher-education institutions. We recruit the most elite and diverse students to our schools and, therefore, turn over incredibly capable individuals. Business leaders have a responsibility to provide opportunities and support to keep those talented and diverse students in the Commonwealth.

**John Stauffer**, Professor of English and of African and African American Studies, Harvard University

The greatest barriers to inclusivity relate to segregation. Boston is in certain respects a classic “donut” city: poor blacks and minorities in the inner city; lily upper-middle-class whites in suburbs. There are exceptions: Cambridge, which has low-income housing--not the “bad” model of massive high-rise structures, but instead many units of 10-12 or so spread throughout neighborhoods in the city. Residents often don’t even know they’re low income. The schools and neighborhoods in Cambridge are remarkably diverse and inclusive. It was easier to achieve in Cambridge because rent control ended not that long ago; and in effect certain forms of rent control remain in place in a shrewd way: low-income housing.

**Yusufi Vali**, Executive director, Islamic Society of Boston Cultural Center

I believe two steps must be taken simultaneously. First, state and city governments should appoint underrepresented minorities in important public official positions. Second, foundations should invest significant money in civic/political engagement trainings for underrepresented communities. The point here is that when underrepresented minorities have a real say in their governments’ affairs and understand how to practice that say, they will feel included. It will lead to an inclusive state
Janson Wu, Executive director, Gay & Lesbian Advocates & Defenders

Inclusion depends on people mixing together, living together, and working together. That becomes harder and harder as housing becomes less affordable in Boston, particularly for the LGBT community, which suffers greater economic insecurity due to discrimination. In addition, while Massachusetts is the proud leader of the marriage equality movement, not everyone in the LGBT community has been included in that progress. We must double down our efforts to ensure equal opportunity and dignity to the most vulnerable in our community, including LGBT youth, elders, transgender individuals, and people of color.

Paul Watanabe, Director, Institute for Asian American Studies, UMass Boston

Diversity and inclusion enhance mutually beneficial opportunities. For individuals, it can mean opportunities to realize their full potential. For the society as a whole, it means the opportunity to benefit from the talents and contributions of everyone. Since inequity limits opportunities, organizations and companies need to take affirmative and corrective measures to reduce those inequities and expand opportunities. This could involve hiring, education and training, promotions, mentoring, etc.

Mason J. Dunn, Executive director, Massachusetts Transgender Political Coalition

Over the past five years we have seen the attitudes towards transgender people begin to shift from widespread misinformation towards tolerance and acceptance. I hope that we can keep this momentum and create a community where all people, including those who are transgender, no longer fear harassment, discrimination, or mistreatment in any facet of their lives. We must educate our communities about the realities that transgender people face in order to create a more inclusive city for all. From our schools to our universities, businesses to corporations, congregations to health centers, and everywhere in between, we must learn how to respect all perspectives and experiences, and spread that awareness to all those around us.

Sharon L. Applegate, Executive director, Deaf Inc.

We aim to increase substantially the number of citizens in Massachusetts who can sign. If we can fill offices, buses, trains, firehouses, police stations, classrooms, restaurants, hospitals, courthouses, shops, and streets with people who are proficient in American Sign Language, we can improve accessibility for the deaf and hard of hearing in the medical, legal, social, municipal, and education areas and change the state of accessibility forever.

Marie Trottier, Consultant, former disability compliance officer at Harvard University

The biggest barriers to inclusion continue to be caused by society, not by anyone’s individual difference, since we are all different. Negative attitudes toward differences result in discrimination. Lack of awareness and traditional prejudices are still significant, and individuals assume and don’t ask questions or communicate, making the person trying to be included mask who they really are.
iv. Boston Globe 12-3-14

12 ideas for making Boston more inclusive

*Imagine a city where no one stands on the outside, where everyone has dignity and an equal chance. Doers and dreamers are hanging their hopes on efforts like these to make it so.*

OTT BAKAL

1) CREATE SPACES WHERE PEOPLE FROM ALL WALKS CONVERGE

- What does it take to sustain community in one of Boston’s most culturally and economically diverse neighborhoods? For Spontaneous Celebrations, a community arts center and coalition in Jamaica Plain, it requires a balance of spontaneity and intentionality: programming that is responsive while building tradition, leadership that reflects the neighborhood’s diversity, and a building whose look and feel actively resists the sweep of gentrification that has transformed the neighborhood.

- It doesn’t hurt to have a history of activism, either. In the 1970s, the group’s founders helped initiate a movement that saved large swaths of Boston from being sliced literally in two, defeating the expansion of Interstate 95 and spawning a celebration, Wake Up the Earth, that has grown into a massive spring festival drawing some 10,000 people.

- “From the beginning, the intention of Spontaneous Celebrations has been to use the language of the arts to build a community and celebrate what can be accomplished when people from all kinds of backgrounds come together,” says administrative director Marco Goldring. The organization’s second largest gathering, the Jamaica Pond Lantern Parade, rings the pond in a 4,000-person procession of light on two nights in October.

- Over the years, the group’s building on Danforth Street has welcomed a wide range of programming from partners—samba and square dancing, social-justice training, dialogues on faith, stilt-walking lessons, martial arts classes, and more. Goldring describes the facility as a physical symbol of the center’s commitment to inclusiveness in the face of growing economic divides.

- “We are a place that is designed to be comfortable for everybody, no matter how long or how short they’ve lived in JP and no matter how close to the edge they may be living.”

- —Francie Latour

2) HELP SKILLED IMMIGRANTS GET RE-LICENSED

- Mauricio Garces came to Massachusetts in 2008 from Medellin, Colombia, where he worked as a bone marrow unit nurse. He arrived with a green card and hopes
that he could quickly resume his nursing career. But despite his specialized skills and a national nursing shortage, Garces would have to navigate a maze of bureaucracy, take seemingly endless English classes, and work survival jobs at TJ Maxx and a Mexican restaurant in Winthrop before he could even take the test to get his Massachusetts nursing-assistant license.

- “I was always depending on others,” says the 44-year-old Garces. “It was very frustrating.”

- The problem of immigrants with foreign medical training who end up in unskilled jobs is a common one. According to the American Institute for Economic Research and the Massachusetts Immigrant and Refugee Advocacy Coalition, physicians with foreign degrees are five times more likely than their American-trained colleagues to be underemployed or employed in fields other than the one they trained for; in Massachusetts, foreign-trained nurses are seven times more likely to face that reality.

- Internationally trained doctors who pass three required US board exams must still repeat their residencies here and must have US clinical experience, which for new immigrants is impossible. Meanwhile, demand for primary care providers and clinical staff throughout Massachusetts is growing.

- In the coming weeks, the Governor’s Advisory Council for Refugees and Immigrants Task Force on Immigrant Healthcare Professionals is expected to issue a report with recommendations on how to improve the situation.

- There are already local efforts and national models designed to alleviate the problem. For example, since its start in 2005, the Boston Welcome Back Center at Bunker Hill Community College has helped nearly 300 foreign-trained nurses get their RN licenses here, providing them with scholarship money for ESL and test-prep courses as well as assistance getting their foreign credentials certified.

- Patients stand to benefit, too. “Many Massachusetts residents have limited access to health professionals who speak their language and understand their culture,” says Allison Cohn, an educational case manager at the Boston Welcome Back Center. “As the Massachusetts population continues to diversify, the health care workforce should better reflect the current population.”

- “They helped me fulfill all my goals,” Garces says of the people at the Welcome Back Center. After working his way up to nursing assistant, he finally got his nursing license in March, six years after contacting the center. Now he is employed as a nurse at Mass. General.

- —Omar Sacirbey

3) BRING HIGH-TECH OPPORTUNITIES TO THE INNER CITY

- There’s a crowd around the table at the top of the stairs leading to Roxbury’s technology incubator, Smarter in the City, in Dudley Square. Two young Cape
Verdean entrepreneurs work on their Web startup with one of the incubator’s mentors, who is white. He has a file from his laptop displayed on the room’s white board. Across the table, a visitor, who is black and interested in becoming a mentor, talks with Gilad Rosenzweig, Smarter’s white founder and executive director.

- Just by its existence, the accelerator is creating a more inclusive environment for technology entrepreneurs in Boston. “We’ve had a constant flow of tech professionals, investors, bankers, marketing professionals, lawyers coming down for meetings here every single week. That’s new,” Rosenzweig says. “They would not have been in this building, not this square, six months ago.”

- That ability to germinate small businesses in places where startups don’t traditionally happen is one reason why the US Small Business Administration gave Smarter in the City a $50,000 Growth Accelerator Grant. The money will help the incubator as it gets ready to accept applications for its second class of entrepreneurs, who will start in February.

- A dozen mentors are key to the prospective success of Smarter’s five startups, all run by minority entrepreneurs, two of them women. They started in July, hoping to break through the skewed numbers on minority entrepreneurs in the United States, where less than 7 percent of startups seeking angel investing are founded by people of color.

- Most startups fail, no matter the race of their founder. That means most, maybe even all five, of Smarter in the City’s businesses won’t make it. But Rosenzweig says that his group has already achieved its goal of showing that good startups don’t have to be in Cambridge or the Innovation District. “They are collectively showing that this neighborhood and the community is a powerful force.”

—Michael Fitzgerald

4) GET HIGH SCHOOLERS TO CROSS CLIQUE LINES

- In the corridors of Brookline High School, if you see a black kid from the Metco program hanging out with a white kid from the wealthiest side of town and ask how they got to know each other, they’re likely to say Abby Erdmann. The veteran English teacher in its School Within a School program has been fondly dubbed a “race warrior” for her innovative efforts, some dating back 11 years, to bring together racially diverse students who otherwise might not even acknowledge one another.

- Race Committee, a weekly free-form class Erdmann teaches, draws kids of different racial and ethnic backgrounds to get together on their lunch break and have unusually honest conversations about diversity. At a recent gathering, more than 40 students crowded into Erdmann’s classroom, sat in a circle, cross-legged on the floor, and began to share their recent brushes with racism. There was no shouting, no yelling, just questions and more questions, insight, and advice. When the session ended after 30 minutes, the students rushed to get to their next
class, but not without stopping to hug Erdmann first and thank her for creating the forum.

- “Race Committee is really driven by the students, who often set the tone for conversation, challenges, and friendly debate,” says Erdmann.

- Another popular program, Race Reels, screens monthly films — such as “The Loving Story” and “Dark Girls” — that touch upon racial issues. It’s open not just to students but anyone in the community. Afterward, audiences discuss and debate what they’ve seen and challenge one another’s interpretations.

- “Brookline has good intentions, and yet there is still a major divide between students of color and white students,” says Erdmann. “Until we look at the structural racism in our school and design a curriculum that reflects other races, [until we] require all teachers, especially white teachers, training in anti-racism work, until we hire teachers and administrators whose race matches our students we will not be able to eliminate the opportunity gap.”

- — James H. Burnett III

5) ENSURE ACCESS TO PUBLIC TRANSPORTATION

- Regular MBTA service is a given in many Boston communities. But too often, says Julian Agyeman, professor of urban and environmental planning and policy at Tufts University, transit plans neglect the poorest neighborhoods, isolating the very communities that most need reliable, affordable transportation. That is finally beginning to change.

- Consider Dorchester’s Codman Square. Until just a few years ago, it took more than 40 minutes and multiple bus trips to travel on public transportation from there to the Newmarket industrial area, home to an estimated 15,000 jobs. Then, in November 2012, the Talbot Avenue MBTA Station opened, and suddenly Newmarket was just a single 10-minute train ride away. “We fought for 10 years to have this increased access to transit,” says Gail Latimore, executive director of the Codman Square Neighborhood Development Corporation.

- Today, other improvements on the Fairmount Commuter Rail Line may help more residents along its 9.2-mile corridor take advantage of economic and social opportunities elsewhere in the city. The line, serving more than 100,000 people in parts of Dorchester, Mattapan, and Hyde Park — lower-income and largely minority neighborhoods — was once characterized by infrequent trips, few stops, and high fares. Many residents were unaware there was rail service in the area at all.

- But in 2005, as part of the Big Dig, the state agreed to improve the rail corridor. Since then, two stops have been refurbished and three additional stops have been built. A fourth new stop is scheduled to open in 2017. Fares to ride the entire line were lowered from more than $5 to $2.10 for most stations, and hourly weekend
service began in late November. The state has also announced plans to add diesel multiple units, a kind of train car that will allow more frequent service.

- Despite this progress, there is more to be done to capture the full benefits of improved transit, says Jeanne DuBois, executive director of the Dorchester Bay Economic Development Corporation. Groups like hers are fighting to stave off gentrification by laying plans for affordable housing and small business growth that will allow current residents to stay—and thrive—in the neighborhoods they call home. For that to happen, two more stations are needed along the Fairmount line at Columbia Road in Dorchester and River Street in Hyde Park to connect more people to work, school, and shopping, says DuBois. “If it’s going to function like a real transit line, that’s what we need.”

- —Sarah Shemkus

6) NURTURE URBAN BUSINESSES

- Nine years ago, when two bankers left jobs at white-shoe financial firms and set up their laptops in Roxbury’s Hibernian Hall, they couldn’t get food delivered. “We would order and they wouldn’t deliver,” recalls Ronald L. Walker II, cofounder and president of Next Street Financial, a merchant bank and advisory firm aimed at inner-city businesses.

- Fueling after-hours strategy sessions was just one of the challenges Walker and his partner, Tim Ferguson, faced in starting Next Street. They were entering a market that many thought was impossible—providing high-level advice and capital to small and mid-size businesses in Boston’s inner city. The two believed that if urban business owners had access to consulting and capital, “we could create jobs and wealth and opportunity,” says Walker.

- Next Street has succeeded on all three counts. The company reports that through 2012, its clients have created or retained 6,000 jobs. It still has its first five clients, at least one of which has sales near $40 million a year. Next Street itself has 45 employees and operates in six other cities. Slightly more than half of its clients are minority-owned businesses.

- Next Street could have failed, says Richard Ruback, a Harvard Business School professor who coauthored a case study on Next Street. “High-quality management advisory talent is a tough space” when aimed at companies of any size, Ruback says. And small businesses of any sort are tough, because they often don’t have the management and financial resources to respond to opportunities. Things get harder when you’re in a neighborhood where you can’t get pizza delivered.

- That business matters even in inner-city neighborhoods should be obvious. “It just makes sense,” says Alicia Robb, a senior research fellow at the Ewing Marion Kauffman Foundation who studies entrepreneurship issues. “People need businesses near where they live. And people live in inner cities.”
• But common sense and common practice have not meshed in many urban environments. Robb’s research found that minority-owned businesses were approved for loans less often than those of whites. Minority-owned businesses also don’t get as much follow-on capital as similar white-owned businesses, and one-10th the number of loans are made to companies in predominantly African-American areas versus those in mostly white areas.

• The challenge for a revitalizing neighborhood is that it becomes more expensive. Walker and Ferguson acknowledge that Roxbury is already seeing some gentrification on Fort Hill. But Walker predicts that Roxbury won’t lose its socioeconomic diversity. He can, he says, get a wide variety of takeout now. Next, he hopes, a couple of nice restaurants might open.

• —Michael Fitzgerald

7) SPREAD THE HEALTH

• Boston has a wealth of hospitals and clinics, but they’re out of reach for many of the city’s residents—especially people in poor neighborhoods. For some health care organizations, the solution is to bring services directly to them.

• Since 2002, Dana-Farber Cancer Institute has been sending its mammography van—a medical office on wheels—around Boston to provide breast cancer screenings to women who otherwise wouldn’t get checked. And in recent years, Dana-Farber has honed its approach, using data from patient surveys to determine exactly where the mobile unit’s services are most needed.

• “We very much look at data to ensure we’re meeting the needs of the community,” says Magnolia Contreras, director of community benefits at Dana-Farber. “They drive what we do.”

• The institute has also partnered with others, including YWCA Boston and Neighborhood Health Plan, an insurer that primarily serves people with low incomes. Based on its own data, Neighborhood Health Plan has targeted black women in Dorchester, Hyde Park, Mattapan, Roxbury, and Roslindale with signs, ads, and phone calls, encouraging them to get screened. Dana-Farber’s mammography van gives women in these communities an easy way to do so.

• The approach appears to be working, Contreras says. The mammography screening rate in Boston is above 80 percent. She’s hoping that ongoing programs like the van will bump that up as high as 90 or 95 percent. Staffed with workers who speak English, Spanish, and Haitian Creole, the van screened about 3,000 women last year, helping to ensure that language and location don’t serve as barriers to good health.

• —Priyanka Dayal McCluskey
8) BUILD MORE MIXED-INCOME HOUSING

- Developer Joseph E. Corcoran helped fund Boston College’s new Corcoran Center for Real Estate and Urban Action with a lofty ambition. “Our hope is to tell the world how to remove ghettos from our major cities,” he says.

- As Boston rents skyrocket, both developers and government officials are looking to mixed-income housing as an important strategy for creating stable, affordable communities. Corcoran’s namesake center will study the development of such housing and how it can help improve life in urban neighborhoods.

- Corcoran has long believed that mixed-income developments can create diverse and harmonious communities like the one he recalls from his childhood in Uphams Corner in the 1940s. “It was a mixture of all kinds of folks, including Polish immigrants, Italian immigrants, Irish immigrants—which my parents were—and Yankees. . . . Some of the people were wealthy, some of the people weren’t. But all of us . . . thought it was wonderful.”

- Mixed-income communities thrive on the diversity of their members, says Richard Thal, executive director of the Jamaica Plain Neighborhood Development Corporation, which has helped establish more than 600 affordable units. “It helps break down barriers if you have people with a variety of backgrounds and life experiences and lifestyles,” he says.

- Mayor Marty Walsh, who released a report in October calling for a 20 percent increase in Boston’s housing stock over the next two decades, supports the idea, too. “Diversity—age, income, race—strengthens our neighborhoods,” Walsh said via e-mail. “Areas with opportunities for a variety of housing options, homeownership and rental, are more stable and create a balance in housing at all income levels.”

- Corcoran himself has put the philosophy into action, building mixed-income properties—often replacing run-down public housing—since the 1970s. His nationally recognized Harbor Point complex, opened in 1988, helped revitalize Dorchester’s Columbia Point neighborhood against all odds. “With American society economically polarized as never before, creating an environment in which rich and poor live amicably side by side is no mean accomplishment,” Architect magazine wrote about the project last year.

- As Boston considers more such projects, partnering with low-income residents at all stages of the process will be key, Corcoran says. And for a simple reason: “They feel pride in it.”

- —Jeremy C. Fox
9) PROTECT THE RIGHTS OF TRANSGENDER PEOPLE

- With same-sex marriage now legal in more than 30 states, building understanding and legal protections for transgender people constitutes the next frontier for many activists involved in lesbian, gay, bisexual, and transgender rights. Could Massachusetts, the first state to recognize same-sex marriage and long a leader in LGBT equality, be at the forefront in ensuring rights for the transgender community as well?

- Efforts here to guarantee transgender people access to public accommodations have stalled at the state level, so activists turned in 2014 to cities and towns, working with governments in Brookline, Newton, Salem, Somerville, and Worcester to pass ordinances protecting access. There already were longstanding protections in Boston, Cambridge, Amherst, and Northampton.

- While the Massachusetts Transgender Equal Rights Act, which went into effect in 2012, outlawed discrimination in employment, housing, and credit, it didn’t protect access to places like stores, hotels, hospitals, and public transportation.

- The new effort has two goals, says Mason Dunn, executive director of the Massachusetts Transgender Political Coalition. “Our thought is to pass things at the city level to provide coverage, as well as to gain momentum,” Dunn says, “with the intention of reintroducing the public accommodations nondiscrimination bill in the next session.”

- Opponents had labeled a proposal that included public accommodations “the bathroom bill,” claiming it would allow biological men access to women’s restrooms and locker rooms.

- Salem’s mayor, Kim Driscoll, says there was no such resistance in her city this year. “I think there’s an understanding in Salem, given what happened here in 1692, that we want to be a place that’s welcoming to all, and this issue really wasn’t raised.”

- —Jeremy C. Fox

10) CULTIVATE INCLUSION EXPERTS

- Inclusion is a practice that can be nurtured. And when you train inclusion experts, the benefits ripple out. Boston is lucky: This year, the University of Massachusetts Boston opened its School for Global Inclusion and Social Development, which university leaders hope will spur positive change not only for the city but even for the world.

- This ambitious program — believed to be the first of its kind — focuses on training leaders who can build more equitable policies and programs for groups that have traditionally been underserved because of gender, race, economic status, or any other reason. The hope is that graduates, equipped with master’s or doctoral degrees, will go on to careers in nongovernmental organizations, public policy, politics, and education.
• “Our mission,” assistant professor Sindiso Mnisi-Weeks says, “is to ensure that public policy is sensitive to the needs of populations that are normally marginalized. These groups are by some counts a majority, but they’re excluded because they’re not part of mainstream discourse.”

• The school developed out of (and now houses) UMass Boston’s Institute for Community Inclusion, which focuses primarily on promoting equal opportunities for people with disabilities. The institute’s successes led to the recognition that inclusion initiatives can benefit many other groups and that there is a need for this work on the international level, says William Kiernan, director of the community inclusion institute and dean of the School for Global Inclusion. “Dozens of US schools have international footprints in health and public health, but we saw an opportunity to teach about a different and equally important kind of human wellness,” Kiernan says. He’s referring to a wellness that focuses on developing the full human potential of marginalized individuals—and thus of the whole society.

• The program has partnerships with NGOs, businesses, and schools around the world, including China, India, Micronesia, Spain, Tanzania, and Turkey, and its students get experience doing community work here in Boston. “We’re training students to be world changers while integrating classroom learning with social-justice programs,” explains Mnisi-Weeks. Locally, students have worked with institutions including Children’s Hospital and the Boston Public Schools.

• “The heart of inclusion is the ability to give dignity to others,” Kiernan says. “By cultivating this quality, we are changing the city.”

• —Nadia Colburn

11) CELEBRATE DIVERSITY THROUGH THEATER

• In 1859, William Wells Brown, a fugitive slave, abolitionist, lecturer, novelist, and performer, read his play “The Escape, Or, A Leap for Freedom” on the abolitionist stages of Boston, playing all the roles himself. But over the next 100 years or so, diversity in Boston’s theater scene did not grow, instead diminishing.

• That has started to change. Promising efforts have taken root to make the face of Boston theater more like the city’s urban mix, as companies, playwrights, and artists begin to push for a greater diversity of voices and perspective.

• Exhibit A: the mission of Company One Theatre, challenging the status quo by connecting diverse communities through socially provocative art that may, for example, feature Hindu gods, examine black-white relationships, or include deaf cast members. “You have to be reflective of where you live, where you work,” says Summer L. Williams, founder of the nonprofit theater company, “and not be dismissive of the stories that are surrounding you. It makes us a better community when we have the opportunity to engage with people of all sorts, not just people who look like us.”
Company One is not alone in considering inclusiveness a given. The arts program at Hibernian Hall, in Roxbury’s Dudley Square, has historically focused on African-American works and audiences, though artistic director Dillon Bustin has recently expanded that mission to include the entire African diaspora, bringing in works and playwrights from Haiti, Cape Verde, and Ethiopia. Escene Latina Teatro in Jamaica Plain produces works in Spanish. The Boston Center for the Arts funds female playwrights developing new scripts though a program it sponsors in collaboration with Company One. It recently supported Nigerian-American actress Obehi Janice’s one-woman show “FUFU & OREOS.”

“Empathy for all stories, from all backgrounds is essential in creating a long-lasting theatrical culture in Boston,” says Janice. “It’s important to create works of high caliber so anyone who sees them will be transformed and contribute to a better cultural consciousness in our city.”

—Cindy Atoji Keene

12) TEACH TOLERANCE TO CHILDREN

Perhaps the first step toward making a community more inclusive is to make it more tolerant from the start, teaching young children to understand and respect different races, cultures, and classes.

It is exactly that goal that Cambridge Friends School teacher Chris Hoeh, who won a Teaching Tolerance award from the Southern Poverty Law Center this summer, aims for with his yearlong second-grade curriculum. The program traces the process of creating cotton clothing, incorporating math, science, art, writing, history, and music along the way.

“It’s using the story of cotton and clothing as a way to teach academic skills as well as the history of anti-bias and social-justice movements,” Hoeh says.

At the beginning of the year, students investigate the fiber content of their clothing; with cotton the most common element, it becomes natural to learn more about the fabric, Hoeh says. In the weeks that follow, they learn about cotton’s connections to slavery and Jim Crow and write persuasive speeches advocating for abolition, which they deliver at Boston’s historic African Meeting House.

The focus is on positive action and role models, on being the “flame, not the ashes,” Hoeh says. “I want them to experience how they can use their skills and talents to make a difference in the world.”

Though the students are generally just 7 and 8 years old, they rise to the occasion in impressive ways, Hoeh says. “The way I can be surprised is the sophistication of what they can do and the connections they can make.”

—Sarah Shemkus
State to hear Stoneham appeal regarding Weiss Farm development

By Brenda Buote, Globe Correspondent  November 23, 2014

The state’s Housing Appeals Committee is scheduled to hold a hearing beginning Dec. 11 to determine whether the town of Stoneham has met the state’s minimum thresholds for affordable housing.

The hearing will determine the fate of John M. Corcoran & Co.’s proposal to build a 264-unit apartment complex at Weiss Farm on Franklin Street under Chapter 40B, the state’s affordable housing law. Under the plan submitted by Corcoran, 25 percent of the units would be set aside for tenants of low to moderate means, in accordance with the state’s affordable housing regulations. If the Housing Appeals Committee determines that the town has failed to meet the minimum threshold for affordable housing, the town’s power to impose conditions on Corcoran’s development would be limited.

Under state law, a community can be exempt from 40B projects if at least 10 percent of its housing stock meets the state’s criteria for affordable housing, the most commonly used benchmark, or by having at least 1.5 percent of its developable land devoted to affordable housing. In Stoneham, 5.3 percent of the housing stock is considered affordable. However, the town’s Board of Appeals this summer asserted that Stoneham’s inventory of affordable housing meets Chapter 40B’s threshold based on land use. The developer contested the board’s decision, and after reviewing the arguments, the Department of Housing and Community Development rejected the town’s affordability assertion.

The town has appealed that finding to the Housing Appeals Committee.

Brenda Buote can be reached at brenda.buote@gmail.com.
Appendix V. Work with Others, December, 2014

Boston Globe 12-3-14

Boston’s 1st diversity chief vows inclusion

By Meghan E. Irons and Andrew Ryan GLOBE STAFF DECEMBER 03, 2014

Boston’s first diversity chief pledged Tuesday to look within city government for pathways to retain and promote more people of color in leadership roles at City Hall. Flanked by his new boss, Mayor Martin J. Walsh, at a crowded press conference, Shaun Blugh promised to establish a culture of diversity to better reflect the racial makeup of Boston and help influence the private and business sectors of the city.

“I hope this means [in] all the neighborhoods in Boston that everyone feels they are part of this city, that they feel represented, and that they feel Mayor Walsh and his administration are looking out for” them, Blugh said.

The appointment of Blugh — pronounced like “blue” — comes after an advocacy group released a report documenting a lack of Latinos in positions of power at City Hall despite the city’s burgeoning Hispanic population. The group asserts that diversity matters at City Hall because research has shown that inclusive bureaucracies are better equipped to handle the complex issues of multicultural cities.

Blugh, a 30-year-old native New Yorker, will direct the mayor’s new office of diversity, charged with providing strategic leadership on Walsh’s diversity agenda and working to hire more people of color. “Diversity is something that I care passionately about,” Blugh said. “And I look forward to pushing the needle even further” in the city.

The diversity chief will work with the Greater Boston Latino Network, a coalition of advocates who issued a report Tuesday — “The Silent Crisis: Including Latinos and Why It Matters” — that offered startling statistics on the lack of Latinos in city halls in Boston, Chelsea, and Somerville.

A new inclusion team that Walsh is creating, and that Blugh will lead, will work with city boards and commissions to ensure they represent the interests of people of color. It also will partner with colleges and universities to create hiring opportunities. Walsh acknowledged Tuesday that he made “very ambitious and serious promises” about increasing diversity in the city’s workforce as he entered office. He lauded the leadership at the local NAACP, the Urban League of Eastern Massachusetts, and the Greater Boston Latino Network who “pushed the government” on diversity.

“For from day one, I’ve been very clear about my commitment to diversity in the city . . . by race, by ethnicity, by gender, and by sexual orientation,” Walsh said. “It’s something I strongly believe in . . . . We all believe that diversity is certainly the strength of our city. But the diversity also has to be empowered.”

In less than a year in office, Walsh contends that City Hall is significantly more diverse than when he began his term. He noted his installation of the most diverse command
staff ever at the Boston Police Department. But Walsh said the hiring and promotion system his administration inherited was outdated and needed to be changed in other departments. “Progress has been slower than we wanted it to be,” he said.

Walsh’s chief of operations, Joseph Rull, cited widely quoted statistics that detail Boston’s changing cultural landscape. More than half of Boston residents are nonwhite, and one in four residents are foreign-born, he said. With a population of more than 645,000, Boston is one of “the most diverse neighborhoods in our nation,” Rull said.

The mayor described Blugh as dynamic, saying he will help Walsh carry out his vision for diversity. Asked by a reporter whether Blugh’s position will have teeth or carry much sway, the mayor quickly responded. “This is going to have a lot of teeth and a lot of sway,” Walsh said. “Clearly, we have some challenges that we have to deal with in the City of Boston, and we are going [to] work on that.”

Blugh will earn $102,000 annually. Freda Brasfield will be paid about $94,000 as deputy chief. Blugh currently recruits and vets minority job candidates for IMB Development Corp., and Brasfield first came to work with the city in 1998 and most recently was manager in the mayor’s Office of Administration and Finance.

Blugh said the diversity office will be used to advocate for policies, procure talent, and increase contracts between the city and businesses owned by women and people of color. The office will also emphasize diversity training, along with recruitment and retention.

Andrew Ryan can be reached at andrew.ryan@globe.com
 Walsh Announces BRA Director, Housing Growth Zones
By Steve Adams, Banker & Tradesman Staff

Boston Mayor Martin Walsh said he is committed to an above-board permitting process as he announced the appointment of a new permanent director of the agency that controls development in the city. Brian Golden, a former state representative and interim director since January, will lead the Boston Redevelopment Authority, which drew fire for favoritism under the late former Mayor Thomas Menino and was criticized for waste and inefficiency in an outside audit released in July.

Golden joined the BRA in 2009 as executive director and secretary. He is a former New England regional director of the U.S. Department of Health and Human Services and was the commissioner of the Massachusetts Department of Telecommunications and Energy during the Romney administration.

"Our goal is to create - for the first time - a predictable and transparent development experience in Boston," Walsh said during remarks Wednesday morning to the Greater Boston Chamber of Commerce. "That requires internal reform." Walsh said progress has been made toward professionalizing city hall's permitting agencies, including adding more frequent meetings for the Board of Appeals, which have reduced backlogs for minor projects.

To achieve his previously announced goal of generating 53,000 new housing units by 2030, Walsh said the city will create a pair of new "growth zones" allowing higher-density development along the MBTA's Red and Orange lines. One will run along Dorchester Avenue between Broadway and Andrew stations. The other will follow the Orange Line from Jackson Square to Forest Hills. Walsh said additional growth zones will follow.

The mayor touted his administration's pro-development agenda since taking office nearly a year ago. New construction starts are up 16 percent this year, with $4 billion of new commercial and residential projects under way, and the BRA has approved $3.7 billion worth of development since January including 4,700 housing units. The housing starts are a step toward Walsh's goal announced in October of creating 53,000 new residential units by 2030 to accommodate a projected population of 700,000, including 44,000 units of workforce housing for people aged 25 to 65.

"We kept the pipeline wide open," Walsh said.

The city is in the midst of a comprehensive zoning review but is making immediate changes designed to eliminate red tape that hinders the growth of small businesses, Walsh said.

"On low-impact uses, like art galleries or bakeries, and on improvements, like take-out service or televisions in restaurants, we'll flip from an automatic 'no' to a thoughtful 'yes,'" he said.
V. Elder Stakeholders Q4 Meeting Notes: August 21, 2014

Elder Stakeholders Q3 Meeting Notes: August 21, 2014

Thanks to all who attended today’s Q3 Stakeholders’ meeting. Below please find the notes.

**Healthy Aging Data Discussion**

Ruth Palombo, Senior Health Policy Officer, Tufts Health Plan Foundation, led a discussion on ways to use the data and provided examples of locations currently exploring opportunities to do so, including the work of the Watertown Foundation, the Newton COA, the Randolph COA and the Healthy Living Center of Excellence in Worcester.

Others shared ideas for use of the data set.

Ruth is interested in hearing from others on what would make this a more powerful tool.

Ruth is planning a meeting on October 6 from 12 Noon – 2pm to discuss; invitation to follow.

**FY15 Budget & Legislative Updates**

Secretary Hartstein provided an overview of the EOEA budget items, including the increase in the supportive housing sites (from 31-41); homemaker wages; FAST teams; Home Care and ECOP with no waiting list; COA increase. Not included are the workforce development piece, elder mental health, and spouses as paid caregivers.

Others spoke about legislative items including:

- Mike Festa, Uniform Adult Guardianship act passed
- Jim Wessler, Dementia Care in Acute setting – DPH will convene small group to study
- Frank Baskin, Geriatric mental health, possibly use of BIP money; FY15 Budget outside section on psychotropic drugs
- Skilled Nursing facilities – new public hearing process if there is a sale or closure
- Skilled Nursing facilities bed hold – increased to 20 days; report due to legislature January 2015
- Economic Development bill – the governor amended it and returned it to the legislature. The amendment addresses a concern of the reverse mortgage industry to allow phone interviews until August 2016, rather than in person. Currently, reverse mortgage companies will need to conduct in person interviews.

**Prescription Advantage**

Gene Mazzella gave an overview of the current program structure and funding challenges. Others expressed concern about the future of the program and an interest in redesigning the program to meet the needs of those falling between the gaps. Diane Paulson circulated a proposal to use the program funding for the Medicare Savings Plan (attached).

**Elder Protective Services Special Commission**
Secretary Hartstein told the group that the report is currently with the legislature and they are responsible for releasing the findings. As soon as any details about the report release are known, they will be shared.

**Announcements & Updates**

- Medicare Observation Status Update – Attached sheet with specific request
- ITN Greater Boston – Garden Party September 20th, 4-7 pm, [www.itngreaterboston.org](http://www.itngreaterboston.org) for more info
- Ellen Bruce Retirement & Pension Action Center event – September 18, [Michele.Tolson@umb.edu](mailto:Michele.Tolson@umb.edu) for more info
- MCOA’s Fall Conference – 10/8-10/14 at Sea Crest Resort, Falmouth
- AARP Massachusetts will be seeking a new state president (volunteer) – see attached letter
- Joan Cirillo attended the screening of I’ll Be Me” and recommended it to all

**Next Meeting**

Thursday, November 20th, 9:30 – 11:00 a.m.
Q4 Elder Stakeholders’ meeting notes 11-20-14:

**FY15 Budget - 9C Cuts Updates**

Secretary Hartstein provided an overview of the 9C budget cuts taken by Governor Patrick that impact EOEA line items,

- $2.3 million in EOEA accounts, MassHealth exempt
- $1.5 million in home care basic – now a managed intake process and wait list, reducing enrollment by 12% per month; by June 2015 expect a 1200 person wait list
- No loss of direct service in any other EOEA account
- Supportive housing – reduction reflected in excess capacity and delayed implementation
- Elder Protective Services – reduction to an earmark
- Elder Nutrition – reduction to an earmark
- Congregate Housing – decrease in utilization and excess capacity
- HCBS Policy Lab – expect to proceed with the work without the funding
- Nursing Homes – rate cuts in pay for performance; rate add ons (user fees)

**Elder Protective Services Special Commission**

The Commission released the findings on October 23rd. They can be viewed at: [http://2pcvxs3f1vx9h55r2186z6lt6b.wpengine.netdna-cdn.com/files/2014/10/Elder-Protective-Service-Commission-Report.pdf](http://2pcvxs3f1vx9h55r2186z6lt6b.wpengine.netdna-cdn.com/files/2014/10/Elder-Protective-Service-Commission-Report.pdf)

**Transitions to Governor-Elect Baker Administration:**

There was discussion about the transition and sharing aging related priorities with the incoming administration. The group discussed the importance of issues such as geriatric mental health, housing, and HCBS.

**Assisted Living Regulations:**

EOEA has developed proposals for regulatory changes; expected to be released before 12/31; a public hearing process will happen.

**Announcements & Updates**

- LeadingAge Massachusetts will host a technology symposium on 12/4 – more info under a separate cover
- AARP Massachusetts will host a policy forum on Bay Staters 50+ on 12/16 – more info under a separate cover

**Secretary Hartstein Recognition**

Many attendees expressed their appreciation for the service of Secretary Hartstein and wished her much success in her future endeavors.

**2015 Meetings**

- Thursday, February 19, 2015
- Thursday, May 21, 2015
- Thursday, August 20, 2015
- Thursday, November 19, 2015