

Strategies to Develop and Preserve Affordable Housing along the Green Line  
Extension for the Somerville Community Corporation

By

Cali Kay Gorewitz

BS in Urban and Regional Studies  
Cornell University  
Ithaca, New York (2003)

Submitted to the Department of Urban Studies and Planning  
in partial fulfillment of the requirements for the degree of

Master in City Planning

at the

MASSACHUSETTS INSTITUTE OF TECHNOLOGY

JUNE 2008

© 2008 Cali Kay Gorewitz. All Rights Reserved

The author hereby grants to MIT the permission to reproduce and to distribute  
publicly paper and electronic copies of the thesis document in whole or in part.

Author \_\_\_\_\_  
Department of Urban Studies and Planning  
(May 22 2008)

Certified by \_\_\_\_\_  
Professor Langley Keyes  
Department of Urban Studies and Planning  
Thesis Supervisor

Accepted by \_\_\_\_\_  
Professor Langley Keyes  
Committee Chair  
Department of Urban Studies and Planning

**Strategies to Develop and Preserve Affordable Housing  
Along the Green Line Extension for the  
Somerville Community Corporation**

Cali Kay Gorewitz

Submitted to the Department of Urban Studies and Planning  
on May 22, 2008 in Partial Fulfillment of the  
Requirements for the Degree of Master in City Planning

**ABSTRACT**

This thesis explores the history and mission of the Somerville Community Corporation (SCC) within the context of the City of Somerville, and the factors that have contributed to its successes and failures in the past, present, and most importantly future. SCC and the City are at a critical moment of change and time is of essence. With the proposed investment of the Green Line extension through Somerville, there are tremendous opportunities for SCC to expand its base, create institutional change, and take on more ambitious development and preservation projects. However, this will only happen if SCC becomes more effective. Therefore the analysis in this thesis focuses not only on SCC's internal and external challenges, but also on ways that collective action on the part of the organization, residents, and the City is needed to take advantage of the transit investment to produce successful development and preservation projects. Interviews and observation show that SCC is most successful at fulfilling its mission, meeting the needs of low-income residents, and impacting political institutions, when there is coordination across its external activities and internal departments, and by including residents in both decision-making and governance. This thesis provides the necessary organizational and development strategies to synergistically reinforce SCC's effectiveness at supporting low and moderate-income residents in Somerville.

Thesis Supervisor:  
Langley Keyes  
Ford Professor of City and Regional Planning

## **ACKNOWLEDGEMENTS**

My first debt is to the staff of the Somerville Community Corporation. The quality of their work, humanity, and generosity sets the highest bar for me. Thank you for warmly embracing and welcoming me into the SCC family! Special thanks to Kristin Blum, Meridith Levy, Danny LeBlanc, Mary Regan, Katie Anthony, Courtney Koslow, Tito Meza, and Trevanna Grenfell. I would also like to thank the allies of the Somerville Community Corporation including Fred Berman, Ellin Reisner, Stephanie Pollack, and the countless residents and activists. Writing this thesis made me fall in love with Somerville. Thank you to the staff of the Sherman Café in Union Square. Additional thanks to the staff at the City of Somerville with special acknowledgement to Madeleine Masters and Dana LeWinter.

Special thanks go to my friends, family, and supporters in Cambridge, San Francisco, and New York City. Thanks go first to Dena Belzer for giving me my first job out of college, helping me understand the housing and transit link, and always giving me great advice. Thanks to Shelley Poticha for nurturing my understanding of transit-oriented development, encouraging me to attend MIT, and serving as an incredible role model. I feel fortunate to have continued my relationship with my former colleagues at the Center of Transit-Oriented Development, while interning at SCC. Thank you to Sam Zimmerman-Bergman and Jeff Wood. I would like to give special thanks to my roommates Amy Stitely and Jessica Durrum. I could not have made it through without your patience, encouragement, and friendship.

Thanks to my readers Ezra Glenn and Lynn Fisher for helping me write a stronger thesis. My upmost thanks go to Lang Keyes for two years of advising and helping me pull this together.

Thank you to my parents Peggy Kay and Shalom Gorewitz for sharing your great love of cities, diversity, traveling, and art. This thesis is dedicated to my grandmothers Freide Gorewitz and Sandy Kay for showing me how to live life fully and passionately.

## TABLE OF CONTENTS

<b>INTRODUCTION .....</b>	<b>5</b>
<b>CHAPTER 1: SOMERVILLE COMMUNITY CORPORATION BACKGROUND .....</b>	<b>9</b>
Social Upheaval and Economic Transitions in Somerville .....	9
Early Years of the Somerville Corporation .....	10
Transitions in Somerville and at SCC.....	11
Somerville Community Corporation Today.....	13
Conclusions: Looking Forward.....	13
<b>CHAPTER 2: CITY OF SOMERVILLE CONTEXT .....</b>	<b>14</b>
City of Somerville within the Boston Region.....	15
Somerville Demographics.....	15
Somerville Housing Market .....	18
Somerville Politics.....	21
Conclusions .....	22
<b>CHAPTER 3: MAJOR DEVELOPMENT AND PLANNING PROJECTS .....</b>	<b>23</b>
Green Line Extension .....	23
Assembly Square.....	28
Union Square Re-Zoning .....	30
Conclusions .....	32
<b>CHAPTER 4: GENTRIFICATION IN SOMERVILLE .....</b>	<b>33</b>
The City's Response to Gentrification .....	34
Lessons Learned from CDCs in Gentrifying Cities .....	38
Conclusions .....	39
<b>CHAPTER 5: ANALYSIS OF SCC'S INTERNAL AND EXTERNAL CAPACITY .....</b>	<b>40</b>
1. Organizational Capacity.....	40
2. Networking Capacity.....	46
3. Political Capacity .....	48
4. Resource Base .....	49
Conclusions .....	51
<b>CHAPTER 6: RECOMMENDED STRATEGIES .....</b>	<b>52</b>
Development of a Shared Vision for Change .....	52
Strategies to Increase SCC's Internal Capacity .....	53
Strategies for Union Square, Assembly Square, and the Green Line.....	55
Conclusions.....	58
<b>CHAPTER 7: ENVISIONING THE NEW SOMERVILLE.....</b>	<b>59</b>
<b>APPENDIX 1: LIST OF INTERVIEWS .....</b>	<b>61</b>
<b>APPENDIX 2: WORKS CITED.....</b>	<b>62</b>
<b>APPENDIX 3: METHODOLOGY.....</b>	<b>64</b>

## **INTRODUCTION**

Somerville, Massachusetts, has historically been four square miles of homes affordable for working families, elderly retirees, graduate students and young couples. From East Somerville to Davis Square, the City is filled with vibrant community life. It is a City with its own quirky character, distinct from Cambridge or Boston. Italian pasta shops coexist with family-owned Peruvian restaurants and Indian markets. Landlords live in shared triple-decker, colonial-era homes with their tenants. Citizen participation in local politics and activism has a long and fabled history. Right now, Somerville residents' energy and determined spirit is being called into action in response to new transit investments, commercial developments, and growing threats of displacement.

The City is undergoing a major transformation as new private development projects and improved mass transit access move forward. These include the Assembly Square Development with a new Orange Line Station and the Green Line extension from the existing Lechmere Station through Somerville to Medford, resulting in the construction of seven new rapid transit stations within the next 6- 7 years. While gentrification has impacted the western neighborhoods of the City for nearly two decades, the introduction of the Green Line will likely extend the reach and speed the process of rising home prices, influx of new residents, and displacement.

At the forefront of this movement is the Somerville Community Corporation. Now nearing its fortieth year, the organization has worked tirelessly to create meaningful change in Somerville by forming alliances, empowering residents, providing services, and building housing for low and moderate-income residents. As the only community development corporation in Somerville, SCC has an important role to play to sustain the diversity and affordability of the City. The central concern of this thesis is to ask what kind of strategies are needed for SCC to both enhance its capacity, overcome numerous internal and market obstacles and take advantage of the Green Line extension to develop and preserve affordable housing. To explore the above set of issues, this thesis is organized in the following way.

## What's Ahead

Chapter 1 presents the long and interesting history of the Somerville Community Corporation. Originally formed to provide services to poor people by means of a soup kitchen and consumer advocacy, in its second decade SCC started rehabilitating and developing affordable housing in response to the end of rent control and opening of the Red Line stations in Davis Square and Porter Square. Historically, SCC's been financially fragile and has struggled to establish a balance among funders' expectations, money to support the organization, and community needs. SCC is the only non-profit housing provider in Somerville and relies on City Hall for its affordable housing development capacity. While, its organizing work complicates its relationship with City Hall, SCC has been and must remain critical to the City's overall development and preservation strategy.

While SCC has always had a small staff (fewer than 20), the composition has shifted over the years to include more professionals and fewer activists. In addition, there has been an effort to include staff and Board members that reflect the growing immigrant communities in Somerville. Over the years its ability to coordinate activities between departments is shaped by the personalities and goals of the CEO, community organizing and housing development directors. There is a growing consensus within the leadership that improved collaboration between the departments is needed.

Chapter 2 provides the context of Somerville, an affordable renter's City that has been built out for nearly 50 years.<sup>1</sup> Even with the recent increased number of condominium conversions, 66% of Somerville's units are rental, dramatically higher than the national average. In the 2000 US census, 42.5% of Somerville residents were low or very low income. Somerville's median income was only 70% of the Greater Boston median, and the number of people in poverty increased to 12.5% from 11.5% in 1990. The highest housing prices are within walking distance of Davis Square, the only subway station in Somerville.

Chapter 3 details the major development and planning projects underway in Somerville and the role of SCC in those activities. These projects include the Green Line extension, Assembly Square redevelopment, and re-zoning of Union Square. These projects will radically affect the development landscape in Somerville. As a result of all

---

<sup>1</sup> In this thesis, the term affordable housing refers to both the government-assisted and unassisted housing stock that is affordable to families paying less than 30 percent of their income for rent or 28 percent of household income to pay the mortgage, property taxes and insurance.

the new investment, there is great potential for rising land prices and real estate speculation to lead to increased housing values and thus displacement of existing residents along the Orange and Green Line corridors. This chapter lays out the different opportunities and challenges facing SCC.

Chapter 4 provides insights into the City's current response to gentrification, why new strategies are needed for SCC and the City, and lessons learned from other community development corporations. Lessons include the necessity of inter-departmental collaboration, coalition building, resident involvement in governing and decision-making, and research. This chapter shows that a pro-active and shared strategy and vision is needed among SCC, the City, and other stakeholders.

For SCC to take a leadership role in Somerville to prevent displacement and develop new affordable housing the organization needs to address several internal and external dilemmas analyzed in Chapter 5. These include SCC's ability to engage residents, form new alliances, and build community power while also depending on the support of City Hall to complete real estate projects. At the heart of this issue is SCC's current challenge coordinating activities among its own departments. While SCC has bold visions and a productive and enduring history, it is currently financially fragile and has a small staff. The challenge for SCC is to know when to partner and when to focus on internal growth and which development and preservation projects to focus on. New financial resources are needed to grow the organization, however there is a dilemma as to whether to follow the money, follow the strategy, or try to do both.

Strategies provided in Chapter 6 will help SCC become more effective to take advantage of the changes likely to result from the arrival of the new transit. These include framing a shared vision with the City and other stakeholders, solidifying its own internal organizational capacity, leading a collaborative community process, and implementing innovative affordable housing development and preservation projects. Strategies do not only need to lead to policy victories and new development projects, but also the long-term sustainability and security of the organization, empowerment of residents, and preservation of existing diversity.

The final chapter imagines the future of the City of Somerville after the Green Line extension is complete. It is a mixed future; one with increased gentrification in Union Square and preserved affordability in other neighborhoods. The major lesson provided by these future activists, business owners, and residents is that only through collaboration, vigilance, and hope will the affordability, diversity, and livability of Somerville be preserved. Somerville will likely always be desirable because of its location near Boston and under tremendous market pressures. It is necessary for SCC and its allies to continue to use organizing, planning, development and other tools to build power and gain control of their communities.

## **CHAPTER 1: SOMERVILLE COMMUNITY CORPORATION BACKGROUND**

As the Somerville Community Corporation (SCC) nears its fortieth year of operation, there is much to reflect upon with pride. It has served as a forceful neighborhood advocate, builds quality, affordable housing available for low-income people in Somerville, and nurtures strong grassroots leadership that is capable of playing a meaningful role in the decision-making process of SCC and the City. In addition, SCC is intimately involved with a strong network of allies in the public, not-for-profit, and for-profit sectors in both Somerville and in the Boston region. However, while SCC has a long track record, and while it is loved by many it also has those who do not support its efforts. The following section provides the history of SCC within the broader political and market context of a changing Somerville.

### **Social Upheaval and Economic Transitions in Somerville**

Through the 1960s, Somerville was a City of close-knit, white ethnic neighborhoods whose residents maintained strong ties to their religious and cultural traditions. Somerville had a long history of political control by a machine with strong ethnic association among the City's Irish and Italian communities. In the 1960s, however, dramatic social upheaval and economic changes threatened the stability of low-income white residents. Somerville's population was declining as the quality of the housing stock and infrastructure deteriorated. In addition, the City was losing jobs, due to the departure of wholesale businesses and the manufacturing industry.

As the established population was declining, new waves of immigrants began to change the face of Somerville. The first wave of immigration came were Portuguese in the 1960, which provoked some tension, but not a lot because the new Somerville residents and the old shared a common religion. There was a greater culture shock, when, beginning in the late 1960s, Caribbeans, most notably Haitians, began to settle in Somerville. At around the same time, Portuguese-speaking people from Brazil, Cape Verde and the Azores began to arrive as well.<sup>2</sup>

Galvanized by the desire to save their neighborhoods from the economic decline, Somerville's growing grassroots leaders and residents began to organize around preventing a major urban renewal project, assisting the growing homeless population,

---

<sup>2</sup> Pinto-Wong, Nicholas J. "MTVF Prez Shelton: City's future flows from its history." *The Somerville News*, June 16, 2004. Accessed 4/28/08: [http://somervilleneeds.typepad.com/the\\_somerville\\_news/2004/06/mtvf\\_prez\\_shelt.html](http://somervilleneeds.typepad.com/the_somerville_news/2004/06/mtvf_prez_shelt.html)

and providing tools for economic self-sufficiency to the lowest-income residents. In the late 1960s Lester Ralph, an Episcopal priest, who was not part of the established political machine was elected mayor on a reform agenda. Ralph pledged to clean up government and support the budding grassroots activism. Civic associations and other grassroots groups were formed. In the flurry of concern, the Somerville Corporation was born in 1969.

### **Early Years of the Somerville Corporation**

Paul Duhamel, an Alinsky-style organizer and Congregational Minister, founded the Somerville Corporation with money from the City Missionary Society of the United Church of Christ to provide services to poor people. He also started the Somerville Multi-Service center, the first soup kitchen and bagged groceries program in Somerville. The organization initiated numerous campaigns including one directed toward consumer advocacy. At this time, utility shut-offs in winter were common and the Somerville Corporation helped educate and protect residents. Duhamel believed that community organizing and housing development should not exist within the same organization. From the early days, Duhamel wanted the Somerville Corporation to develop affordable housing so in 1975 Duhamel helped found the Somerville United Neighbors (SUN) to focus on community organizing.

### ***Somerville Corporation responds to the 1st wave of real estate upheaval***

By the late 70s, Somerville was experiencing growing stress from an influx of immigrants from Haiti, the end of rent control in 1979, and real estate pressure. In 1978 Mayor Ralph's term as mayor ended after fall-out accelerated by his personal governing style. The old political machine came back with the election of Tom August for a two-year term. Afterwards, Gene Brune, a member of the 1960s reform movement, became mayor. In the 1980s with the opening of the Porter and Davis Square rail stations, Somerville experienced its first wave of major real estate upheaval. The Somerville Corporation responded to the growing need of affordable housing by starting its Housing Development Department and renovating an existing two-family home and constructing a duplex.

### ***Early wins for the Somerville Community Corporation***

In the mid-1980s, the Somerville United Neighbors ceased to exist and the Somerville Corporation was renamed the Somerville Community Corporation (SCC). John Taylor became the CEO of SCC. The first major housing development completed

by SCC was the rehabilitation of the Northeast Junior High School into an all-affordable 32-unit ownership development. SCC gained great praise for the project. However, many of the units were re-sold after occupation, making this project an early poster child for the need of deed restrictions. SCC started its Housing Assistance Program in 1987 to provide help for low-income people looking for housing. Between 1990 and 1991, racial tensions rocked the Somerville high schools. SCC responded by starting an exclusively school-based mediation program. The program was universally praised and brought positive attention and credibility to the slowly expanding SCC.

By the start of the 1990s the staff size was small and consisted mostly of activists, and was increasingly viewed with distrust by the City. One example that illustrates this growing animosity was around the expiring use of the Clarendon Hill Towers. While SCC was actively involved in preserving affordability for other smaller expiring use properties, it was largely excluded from the process of this very large development. Some people acquainted with SCC at the time say that it was largely because CEO John Taylor was seen as a “loose cannon” and not very reliable or competent.

### **Transitions in Somerville and at SCC**

During the 1990s, SCC experienced a series of crises that brought the organization to the brink of disaster. In the early 1990s Mike Capuano left the SCC Board of Directors to become mayor. According to the Boston Globe, Somerville under Capuano was “improving fast -- from a mobbed-up sinkhole of corruption to a funky, family-friendly city, gaining ground on nearby Cambridge and Boston.”<sup>3</sup> Mayor Capuano hired former SCC Board President Paula Stewart to serve as City Housing Director. According to several sources, Stewart was no longer supportive of the organization. SCC was powerless during her time in office, as affordable housing development by SCC was nearly impossible without City support. At the same time SCC lost credibility after being legitimately called a neglectful landlord by its tenants and former allies at the 1 Summer Street property.<sup>4</sup>

---

<sup>3</sup> Mooney, Brian. “City’ Guy Weighs State Run.” *The Boston Globe*, December 26, 2004. Accessed 5/2/08:  
[http://www.boston.com/news/politics/governors/articles/2004/12/26/city\\_guy\\_weighs\\_state\\_run](http://www.boston.com/news/politics/governors/articles/2004/12/26/city_guy_weighs_state_run)

<sup>4</sup> Danny LeBlanc, interview by author, Somerville, MA., 24 January 2008.

### ***SCC spirals downward***

William Shelton became CEO in 1992 and SCC continued to undertake increasingly complex and risky endeavors. The Sewall Street 14-unit Single Room Occupancy development in 1993 was a huge challenge and took immense energy away from other organizational activities. The organization was in a deficit and the project lost money. However, Shelton wanted SCC to be cutting edge and started a telecommunications training program and business incubator.<sup>5</sup> However, because federal money no longer supported those kinds of projects, they resulted in the crippling of SCC's budget. After the failure of these projects the organization continued to spiral downward, quality of staff declined, resources disappeared, and support from former allies was lost. The City's confidence in the organization was at an all-time low.

### ***SCC makes a comeback***

During this tumultuous period, it became apparent that the greatest challenge in keeping SCC alive required restoring confidence among funders, the City, and community members. Following Shelton's departure, Meg Mainzer-Cohen was hired as CEO and gained the support and confidence of newly elected Mayor Dorothy Kelly Gay at a critical moment in SCC's history. Kelly Gay had deep ties to progressive community and ethnic organizations. However, Stewart remained the City's Housing Director, which continued to hurt SCC. At this point, SCC's Board of Directors made the critical and politically risky decision to confront the Mayor about Stewart.<sup>6</sup> Mayor Kelly Gay was empathetic with SCC and replaced Stewart.

Mainzer-Cohen helped revive the organization by restructuring assets, reorganizing operations, and raising substantial amounts of money. The 1 Summer Street property was sold to pay down debts and reduce monthly operating expenses. Most importantly, SCC renewed its commitment to its original mission by focusing on promoting community leadership and affordable housing development. Mainzer-Cohen helped put SCC back on the map by embarking on the ambitious Linden Street development. With the strong support of the Mayor and eventually the community, SCC demolished the existing "business incubator" on Linden Street and constructed 42 affordable rental-housing units. The process took several years and was a major win for the organization.

---

<sup>5</sup> Fred Berman, interview by author, Cambridge, MA., 4 April 2008.

<sup>6</sup> Danny LeBlanc, interview by author, Somerville, MA., 11 April 2008.

Danny LeBlanc, the former Staff Director at the Somerville United Neighbors, SCC board member and life-long Somerville resident was hired to serve as CEO in 2001. When LeBlanc started, he argued that Somerville had no group that practiced systematic organizing, and that its absence was a crucial gap in City life that needed to be filled. Viewed by many as a visionary and competent leader, LeBlanc has focused on gaining community buy-in and developing new partnerships and funding sources. He has brought racial and ethnic issues to the foreground of SCC's work.

### **Somerville Community Corporation Today**

SCC has a proven track record and credibility in Somerville with many strong allies and partners in City government, local non-profits and for-profits, funders and regional players. SCC has endured and continues to be a major non-profit contributor to the affordable housing sector. The mission of SCC focuses on increasing and preserving affordable housing by promoting community leadership and supporting Somerville's lowest income residents. The Organizing Department is developing leaders, forming alliances, and launching new campaigns. The Housing Development Department is taking on increasingly ambitious projects. The membership base is growing, and now numbers over 250. In addition, SCC continues to help capitalize on community assets and those of individuals by providing financial literacy training, homeownership support, leadership training, homeless prevention and emergency housing services, and mediation support.

### **Conclusions: Looking Forward**

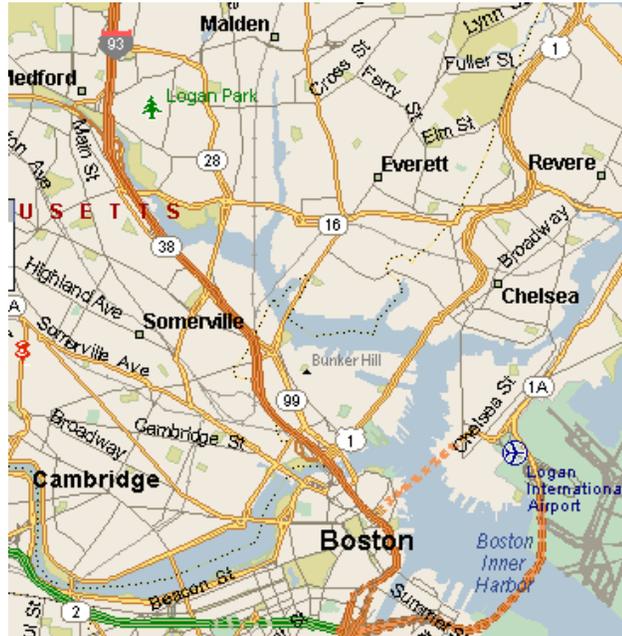
Today, partly due to the Green Line extension, the Somerville Community Corporation is faced with many opportunities to have a bigger and more effective role in Somerville. This is only possible if SCC creates a shared vision for the future with the City and other stakeholders. In addition, development strategies need to reinforce collaboration and coordination between the different departments and activities. SCC does not exist in its own bubble and these decisions and strategies are influenced by the wider market and political realities of Somerville and the region. The following chapter provides a snapshot of Somerville today in order to better understand SCC and its opportunities, challenges, and needed strategies.

## CHAPTER 2: CITY OF SOMERVILLE CONTEXT

Somerville is distinctly a City of homes. This is radically different from a City of wealth or a manufacturing City. Such a City requires unusual effort to make it beautiful, convenient and comfortable. It must also have an unusually active local sentiment.

Mayor Edward Glines, Inaugural Address 1902<sup>7</sup>

Tiny Somerville is wedged into a corner between Cambridge and Medford, known for its residential neighborhoods and diverse and politically engaged residents. It is the most densely populated city in New England, not because of a prevalence of high-rise developments but a lack of parks and open space. The City is bisected by the ugly McGrath/O'Brien Highway. Triple-deckers, single-family homes, and small multi-family rental units line the streets on small lots. Largely settled in the past by Irish and



MapQuest.com

Italians, Somerville is now home to new immigrants including Brazilians, Haitians, Salvadorans, and South Asians. Many recent immigrants are employed in low-wage service jobs and live in East Somerville. Hip artists and young urban professionals who might once have looked for a place in the South End are now living in Davis, Ball or Union Square. They are attracted to Somerville because of its openness to change and acceptance of diversity.

Big things are happening in Somerville. Despite a cooling regional housing market, buildings in Somerville continue to fetch high prices. While the foreclosure crisis hit many other cities in Massachusetts, Somerville has remained relatively unscathed. Real estate investors, galvanized by the Green Line extension, believe that these trends will only increase. Several large re-zoning and planning projects are in process and will radically impact the development landscape in Somerville.

<sup>7</sup> Zellie, Carole. 1982. *Beyond the Neck: The Architecture and Development of Somerville, Massachusetts* (City of Somerville/Landscape Press)

Politically, Somerville is an interesting City. Somerville has a long history of supporting a large number of active community and ethnic organizations. At the same time Somerville, like cities and towns across the Commonwealth, is fiscally strapped. While Somerville has become a model community for 'doing more with less,' and spends the least per capita of any Massachusetts community over 50,000 residents it is still struggling.<sup>8</sup> Economic development priorities fueled by the City are often at odds with local progressive organizations, most fiercely around the Assembly Square redevelopment, immigrants' issues, and Union Square re-zoning.

### **City of Somerville within the Boston Region**

Somerville is a mature suburb of Boston and has been built out for over 50 years. The Boston region is one of the most expensive places to live in the United States and has one of the tightest housing markets. This is shown in low vacancy rates and high sale and rental rates. Lower-priced neighborhoods in Boston and the inner suburbs (including Somerville) where market-rate prices are affordable are quickly disappearing. Outside of the urban core, much of the Boston region is auto oriented and suburban. Since 1990, the median household income in the City of Somerville has risen faster than the regional average, with a 43 percent increase in Somerville compared to a 30 percent increase in the region as a whole. Yet despite this faster increase, the median income in the City of Somerville was still about 88 percent of the regional median.<sup>9</sup>

### **Somerville Demographics**

According to former City alderwoman, Denise Provost, it is "essential to the soul of Somerville that it remains home to old-timers as well as newcomers, to people of modest means as well as the well-to-do, and to families as well as singles."<sup>10</sup> The following analysis of Somerville's demographics is based on 2000 US Census data. US Census is conducted only every 10 years, and therefore is out of date quickly. However, the US Census is the most comprehensive data set available to give information and background on the demographics of the City.

---

<sup>8</sup> Guiha, Auditi. "Mayor Joe: Business future bright in Somerville." *The Somerville Journal*, April 6, 2007. Accessed 4/7/08: <http://www.wickedlocal.com/somerville/archive/x136588047>

<sup>9</sup> Reconnecting America. 2008. "Somerville Equitable Transit-Oriented Development Strategy." Unpublished report prepared for the Somerville Community Corporation.

<sup>11</sup> Agarwal, Nisha. "Somerville, Massachusetts." *The Next American City*. Accessed 3/2/08: <http://americancity.org/magazine/article/somerville-massachusetts-agarwal/>

### ***Declining families and increasing elderly populations***

Somerville has long attracted and retained families. However, according to 2000 Census data the median age in Somerville is 31 and the number of residents under 24 fell from 1990, thus signaling a decline in families. The majority of the population in Somerville is between 25-54 and over 85 years old.<sup>11</sup> At the same time that these demographic groups have grown in Somerville, the State of Massachusetts has lost a large percentage of this population. Interestingly, the greatest decline in Somerville is in the 55-85 or Baby Boomer population, contrary to the fact that this population is growing nationally.

### ***City of immigrants***

Somerville has historically been a City of immigrants. Minorities account for 27 percent of the population; 29 percent of the population is foreign born; and 9 percent of the population includes limited-English speakers. This translates into nearly 19,000 residents per square mile, with approximately 1,461 limited-English speaking residents per square mile.<sup>12</sup> The City of Somerville High School reported that in the 2004-2005 school year, over 50 percent of students grade 9-12 spoke a language other than English as their primary language.<sup>13</sup>

### ***City of renters***

Somerville has long been a renter's City because of its housing stock and close proximity to downtown Boston, MIT, Harvard, and Tufts. The population is very transient, as many of the renters are students or recent graduates. Even with increased condominium conversions, 66% of Somerville's units are rental, dramatically higher than the national average (35-40%). However, there are also a great number of resident owners of 2- and 3-family houses in Central Somerville. Around the Green Line Extension and the Orange Line, over 70% of 1-, 2-, and 3-family properties have an owner in residence.<sup>14</sup> These households who have already invested in the neighborhoods will be able to benefit from improved transit access with new stations.

---

<sup>11</sup> US Census 2000. <http://factfinder.census.gov>

<sup>12</sup> US Census 2000. <http://factfinder.census.gov>

<sup>13</sup> City of Somerville. "Five Year Consolidated Plan 2008-2013." February 2008. Section 1: Housing, PP 26.

<sup>14</sup> Reconnecting America. 2008. "Somerville Equitable Transit-Oriented Development Strategy." Unpublished report prepared for the Somerville Community Corporation.

Around the Red Line stations, there is a lower rate of owners in residence, suggesting that these properties may have become more valuable as investment properties.<sup>15</sup>

### ***Large percentage of low and middle-income households***

Historically an affordable place to live, Somerville has a large population of low and middle-income residents. In the 2000 census, 42.5% of Somerville residents were low or very low income. Household incomes are rising modestly most likely as a result of higher housing costs and the displacement of lower-income residents. However, Somerville is still not a wealthy community and the number of people in poverty increased to 12.5% from 11.5% in 1990.

### ***Shrinking household size***

Following the national trend, average household size in Somerville has decreased from 2.44 in 1999 to 2.38 in 2000.<sup>16</sup> Anecdotal evidence shows that almost all of the new developments are studios and one-bedrooms and do not cater to families. While approximately 80 percent of school-age children in Somerville attend the Somerville Public Schools, the number of school age children has been slowly decreasing.

### ***High dependence on public transportation***

Central Somerville is currently relatively isolated from transit access to Downtown Boston and other key regional job and education centers such as Harvard and Kendall Squares in Cambridge. However, there is an extensive bus network in Somerville and rail stops in Davis Square and Porter Square (and Sullivan Square, which is in Charlestown). According to 2000 US Census data, Somerville residents rely heavily on public transportation, with 29 percent of residents depending on transit to get to their jobs. Additionally, 27 percent of households do not own cars. The Red Line station areas have much higher transit usage, than the rest of the City with 40% of residents using transit to commute to work.

### ***Conclusions***

Somerville is a diverse city and the shifting demographics provide many opportunities for SCC. There is a need for affordable housing that caters to families and the elderly. The Green Line will provide important access to opportunities for residents if they are able to stay despite the pressures of the current housing market described in the next section.

---

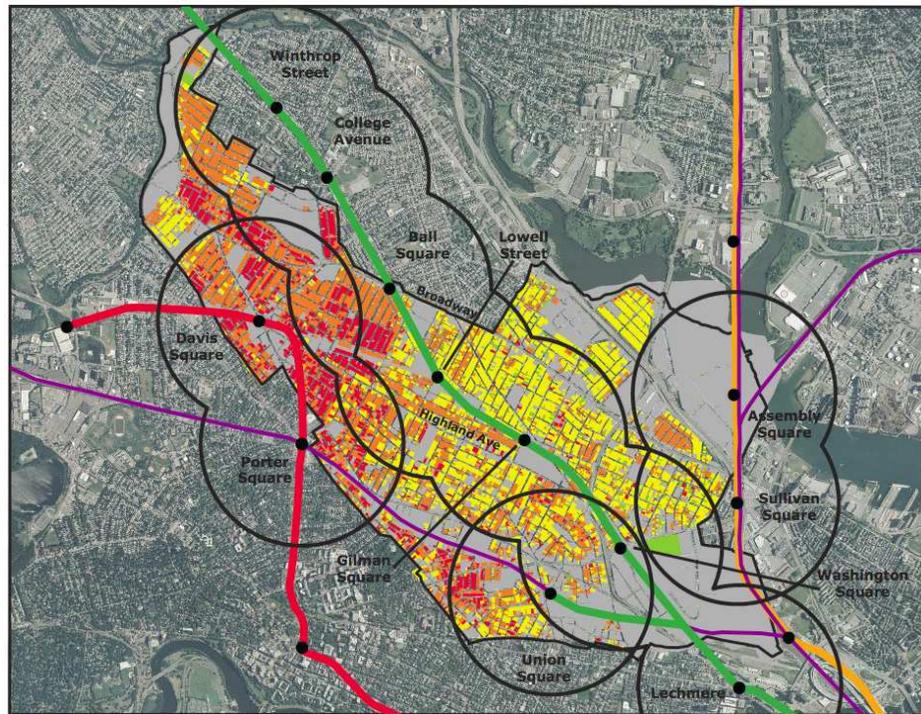
<sup>15</sup> Reconnecting America. 2008. "Somerville Equitable Transit-Oriented Development Strategy." Unpublished report prepared for the Somerville Community Corporation.

<sup>16</sup> City of Somerville. "Five Year Consolidated Plan 2008-2013." February 2008. Section 1: Housing.

## Somerville Housing Market

A purple and grey four-unit building on McGrath Highway is a microcosm of Somerville. The smells of Indian curries mix with the Chinese cooking upstairs. One unit is rented to new immigrants, while a young family with children occupies another apartment. Upstairs lives a life-long Somerville resident who is an avid collector and activist. The house is in poor condition with a neglectful landlord; however, the backyard is well loved and cared for by the renters. Spices grow alongside blooming flowers and the tenants share the barbecue grill. A short walk away toward Union Square, a church has been converted to condominiums. This is the kind of diversity that residents, including the Mayor, believe in and want to sustain.

### Somerville Residential Land Cost



Produced by Reconnecting America, 2008

“Somerville’s housing market is going through a dynamic phase of development right now,” according to SCC Organizing Director Meridith Levy.<sup>17</sup> In recent years housing prices in Somerville have increased dramatically, making this once affordable community more and more difficult for people with low, and moderate-incomes. Shifting national and local affordable housing funding priorities, growing regional competition,

<sup>17</sup> Meridith Levy, interview with author, Somerville, MA., 29 January 2008

and the sub-prime crisis have all strongly impacted Somerville.<sup>18</sup> At the same time, according to Dana LeWinter, the City's Director of Special Projects at the Housing Department, "Somerville is ahead of the curve with almost 10 percent of all housing at 80 percent of area median income or below."<sup>19</sup> Land prices are very high and it is difficult for SCC to develop and preserve housing without several layers of subsidy. The following is a brief description of the housing market in Somerville based on 2000 US Census data and 2004 Somerville Assessor's Data.

### ***Older existing housing stock***

The majority of the housing stock in Somerville consists of 2-3 family homes, with less than 10% of units in buildings with four or more units or in mixed-use buildings. Over 90 percent of all housing units in the City were built before WWII, compared to just over 1/3 in the region.<sup>20</sup> Somerville's older housing stock makes maintenance and rehabilitation particularly challenging. A consequence of the older housing stock is the constant need for repairs and high cost of improvements. While City funds are available to low-income households to rehabilitate homes, the waiting list is several years long.

### ***Soaring house prices and foreclosures***

While housing prices are currently remaining steady in Somerville and even slightly increasing in some neighborhoods, it is important to acknowledge the changes since 2000. Two-bedroom apartments rent for \$1,200 - \$1,800; the single-family median sales price increased 90% from 2000-2007, from \$229,000 to \$435,000; and condominium median sales price increased at the same time by 46%, from \$242,000 to \$353,250.<sup>21</sup> The highest housing prices are seen within walking distance of Davis Square, home to Somerville's only existing subway station. However, new housing starts in the recent past have remained fairly stable. From 2002-2004, Somerville saw a net gain of less than 1 percent of the total housing stock (64 units).<sup>22</sup>

At the same time that prices have increased, foreclosures have tripled over the past 3 years in Somerville. However, according to several sources, the City is not

---

<sup>18</sup> Walsh, Dee and Robert Zdenek. "Balancing Act: Old definitions may be obsolete as CDCs weight whether to grow and hot to build their impact in today's social and economic environment." *Shelterforce Online*, Winter 2007. Accessed 2/28/08:  
<http://www.nhi.org/online/issues/152/balancingact.html>

<sup>19</sup> This includes projects that are in the current pipeline and public housing. Dana LeWinter, interview with author, Somerville, MA., January 30, 2008.

<sup>20</sup> US Census, 2000. <http://factfinder.census.gov>

<sup>21</sup> City of Somerville. "Five Year Consolidated Plan 2008-2013." February 2008. Section 1: Housing.

<sup>22</sup> City of Somerville. "Five Year Consolidated Plan 2008-2013." February 2008. Section 1: Housing, PP 8.

viewing this as a crisis.<sup>23</sup> Thirty-six foreclosures were reported in Somerville in 2007 while the City of Boston saw 723 foreclosures. Even though Boston's population is 7 times larger than Somerville's, proportionally, the foreclosure rate per capita in 2007 was 0.11% and 0.30%, for Somerville and Boston respectively.<sup>24</sup> It remains to be seen if more foreclosures are going to occur in the coming years but it is expected.

### ***Limited opportunities for new development***

Somerville has been largely built-out for a long time and there are limited opportunities for new construction. However, Assembly Square, Boynton Yards, the Conwell School site, and Union Square all present the opportunity for large-scale development. The rest of the City is likely to continue to see low numbers of new construction.<sup>25</sup> In addition, land prices are very high.

### ***Loss of rental housing***

An estimated 200-250 rental units are converted to for-sale condominiums each year.<sup>26</sup> This is a major issue that is a cause of concern for SCC. Rental properties are deteriorating, because of both legitimate financial limitations and outright neglect. Without intervention, this situation can lead to foreclosure, abandonment, and the need to demolish properties that are cost-prohibitive to restore. Long-term government subsidies and affordability restrictions are expiring. Upon expiration, owners are free to opt out of their obligations or refinance their government-backed mortgages and take the units into the private market, either as higher-cost rentals or condominium conversions. This is a huge threat to sustaining the diversity and affordability of Somerville.

### ***Increasing rental costs***

There is no comprehensive data on current rents for Somerville. For the 2008-2013 Somerville Consolidated Plan, a survey of apartment listings was completed. The data showed a large percentage of households pay more than 30 percent of their income on housing. Anecdotally, realtors and landlords noted that rents appear to be stabilizing and falling slightly since the peak in 2002-2003.<sup>27</sup>

---

<sup>23</sup> City of Somerville. "Five Year Consolidated Plan 2008-2013." February 2008. Section 1: Housing, PP 61.

<sup>24</sup> Lo, Apple. "Foreclosure Prevention Plan for the City of Somerville." (Policy Analysis Exercise, Harvard University, 2008).

<sup>25</sup> Dana LeWinter, interview by author, Somerville, MA., 30 January 2008

<sup>26</sup> Dana LeWinter, interview by author, Somerville, MA., 30 January 2008

<sup>27</sup> City of Somerville. "Five Year Consolidated Plan 2008-2013." February 2008. Section 1: Housing, PP 18.

## **Conclusions**

The current housing market and increasing loss of affordability is of great cause of concern to SCC and Mayor Joe Curtatone. At the State of Young Somerville address, Mayor Curtatone said “We celebrate diversity in our neighborhoods...No matter where you are from, we want you here and we want to make the city better for you.”<sup>28</sup> The following section provides a background on politics in Somerville and insights into the Mayor and Director of the Office of Strategic Planning and Community Development. This is necessary in order to inform strategies on partnership opportunities between SCC and the City.

### **Somerville Politics**

Somerville is a highly democratic and political city. Until the late 1960s, it was largely homogeneous and politics was personal. It was the kind of place where politicians knew their constituents by names. Most of the Mayors and Aldermen represented the Irish and Italian communities. Beginning in the 1970s mayors ran on reform agendas to “clean-up” City Hall from the perceived corruption and connection to business interests. These reform mayors encouraged the development of civic and neighborhood associations to help shape decisions made in City Hall.

Partly as a result of the end of rent control and because Somerville is more affordable than Boston or Cambridge, there has been an influx of students, progressives, and artists since the late 70s. This highly educated and often transient group has brought a more impersonal kind of politics to the City. Rather than relying on personal connections, the newer residents communicate through blogs and are more technocratic. However, the current Mayor has tried to reach out to this not very homogeneous group in many ways including town halls, artist overlay zoning, and other investments in the creative industries.

#### **Mayor Joe Curtatone**

Mayor Joe Curtatone is currently serving his third two-year term in Somerville. A life-long Somerville resident and first-generation Italian immigrant, he continues to impress people with his competency and ability to bring local and national attention to Somerville. He is young, ambitious, and enthusiastic. Curtatone and his staff are willing

---

<sup>28</sup> Auditi, Guha. “Mayor woos residents aged 21-35 at Young Somerville.” *The Somerville News*, October 16, 2007. Accessed 5/17/08: [http://www.wickedlocal.com/somerville/town\\_info/x1909891389](http://www.wickedlocal.com/somerville/town_info/x1909891389)

to take risks and reinvent the wheel. One of his major priorities as mayor is restoring character, pride, and tradition to Somerville. Curtatone is also a realist and recognizes that raising the tax base by increasing the percentage of middle-class homeowners and commercial space in the City is needed.<sup>29</sup> However, he also argues that the Green Line extension should not reduce the “historically large levels of affordable housing.”<sup>30</sup>

***Monica Lamboy, Director of Strategic Planning and Community Development***

“Monica is a change agent who has succeeded in some very demanding situations,” said Mayor Curtatone.<sup>31</sup> A newcomer to Somerville, most recently from Washington D.C., Lamboy was appointed by the Mayor in Spring 2007. She has the reputation for being thorough, careful, and competent. She has proven to be hard working, ambitious, and creative.

### **Conclusions**

Somerville has a vibrant immigrant community and is teeming with artists and longtime residents. This chapter on the context of Somerville shows that demographic and market signs show change has already started to come. What makes Somerville distinct is its openness to change, acceptance, and desire to improve. The following chapter moves from the Somerville context to opportunities for SCC to direct this change.

---

<sup>29</sup> Residential development generates twice the cost to the city in terms of services, while only generating two-thirds of the tax revenue. Somerville News. Accessed April 28, 2008: [http://somervilleneeds.typepad.com/the\\_somerville\\_news/2004/06/mtvf\\_prez\\_shelt.html](http://somervilleneeds.typepad.com/the_somerville_news/2004/06/mtvf_prez_shelt.html)

<sup>30</sup> “Progressive Democrats of Somerville. “Mayor Questionnaire: Joe Curtatone.” Accessed 3/13/08: <http://www.pdsomerville.org/elections07/mayor-curtatone>

<sup>31</sup> City of Somerville. “ Mayor Appoints Monica Lamboy to Head Office of Strategic Planning and Community Development.” March 20, 2007. Accessed 4/1/08: [http://www.somervillema.gov/newsDetail.cfm?instance\\_id=991](http://www.somervillema.gov/newsDetail.cfm?instance_id=991)

## **CHAPTER 3: MAJOR DEVELOPMENT AND PLANNING PROJECTS**

### **IN SOMERVILLE**

“Somerville has the opportunity to set a national standard for thoughtful, successful urban development that maintains local neighborhood identity while enhancing economic opportunity and quality of life,” said Monica Lamboy.<sup>32</sup> In the midst of all the demographic and market changes in Somerville, several large-scale development and planning projects are in the works, pushed forward by the Mayor and business community. This thesis focuses on the biggest project, the extension of the Green Line from Lechmere Station to Union Square and along the existing Lowell Commuter Rail corridor through Somerville to Medford. At the same time, the redevelopment of Assembly Square and re-zoning of Union Square will radically shift development conditions in Somerville. Union Square and the new Assembly Square are areas of high redevelopment potential due to the availability of underutilized commercial and industrial land. Other proposed station areas along the Green Line are likely to experience increases in desirability, which have the potential to impact housing affordability. The following section provides both an introduction and analysis of the projects as well SCC’s involvement thus far.

#### **Green Line Extension**

“For far too long the residents of Somerville have lived with the burden of mass transit cutting through their neighborhoods but never providing service within the City,” Mayor Curtatone said at a news conference in April 2008.<sup>33</sup> Extending rail transit service to Somerville and Medford has been the subject of several studies over the last 40 years. The Commonwealth of Massachusetts, in obtaining environmental permits for the “Big Dig” in the early 1990s, committed to implementing a number of Boston region transit improvement projects as air quality mitigation measures, including the Green Line extension. Residents and local officials in Somerville have been advocating for the extension ever since this commitment was made but not carried out.

---

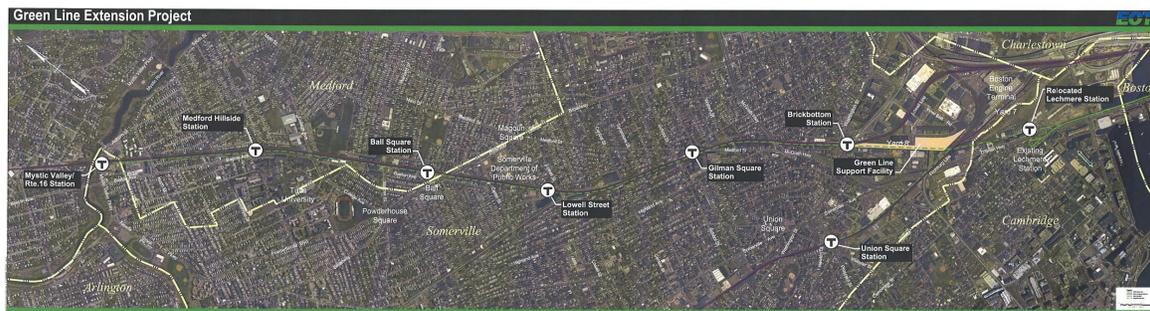
<sup>32</sup> City of Somerville. “Mayor Appoints Monica Lamboy to Head Office of Strategic Planning and Community Development. March 20, 2007. Accessed 4/1/08.: [http://www.somervillema.gov/newsDetail.cfm?instance\\_id=991](http://www.somervillema.gov/newsDetail.cfm?instance_id=991)

<sup>33</sup> Hasset, George P. “State fully funds Green Line extension” *The Somerville News*, April 25, 2008. Accessed 4/29/08: [http://somervillenews.typepad.com/the\\_somerville\\_news/2008/04/state-fully-fun.html#more](http://somervillenews.typepad.com/the_somerville_news/2008/04/state-fully-fun.html#more)

In 2005, the Conservation Law Foundation (CLF) sued the state because it had not completed the project on time. In November 2006, CLF and the State agreed on a binding commitment to complete the project by 2011. That commitment was pushed back to 2014 and in April 2008, Governor Patrick signed into law a \$3.5 billion transportation bond bill that includes the \$600 million necessary to fund the Green Line extension. The bond bill had previously been approved by both the state Senate and the state House of Representatives. Patrick's administration will seek federal funding to cover some of the extension's costs but the money in the bond bill ensures there will be no delay in the project, according to City officials.<sup>34</sup>

The proposed extension will include two branches. One branch will travel to the heart of Union Square with the stated goal to revitalize it and relieve traffic on the Route 28 Corridor.<sup>35</sup> The other branch is currently proposed to travel along the Lowell Community Rail Line with stops at Brickbottom, Washington Street, Gilman Square, Lowell Street, Ball Square, College Avenue, and Winthrop Street in Somerville as well as at least two stops in Medford.<sup>36</sup> The current phase of the Green Line Extension Project - scheduled to last until November 2008 - is focused on finalizing the best route and station locations for the new transit service.<sup>37</sup> Several well-attended community meetings were held in the various proposed station locations during winter 2008.

### Green Line Extension



Green Line Extension Website, 2008

<sup>34</sup> Hasset, George P. "State fully funds Green Line extension" *The Somerville News*, April 25, 2008. Accessed on 4/29/08:

[http://somervilleneews.typepad.com/the\\_somerville\\_news/2008/04/state-fully-fun.html#more](http://somervilleneews.typepad.com/the_somerville_news/2008/04/state-fully-fun.html#more)

<sup>35</sup> Green Line Extension website, accessed 4/13/08: <http://www.greenlineextension.org/>

<sup>36</sup> Green Line Extension website, accessed 4/13/08: <http://www.greenlineextension.org/>

<sup>37</sup> Green Line Extension website, accessed 4/13/08: <http://www.greenlineextension.org/>

### ***The Green Line as another word for gentrification***

The Green Line is “the” hot topic in Somerville and viewed by many as the “biggest thing to ever happen” to the City.<sup>38</sup> While many Medford residents are resistant to the new transit line, Somervillians are welcoming it with celebrations including art exhibits.<sup>39</sup> Gentrification is a common topic in some circles and people question how much displacement and speculation has already occurred. Some welcome the increase in property values, new businesses, and services that are likely to come alongside the Green Line. Those people argue that there is enough affordable housing in Somerville, or at least the eastern half. Others, including the Mayor and SCC value the current community fabric, diversity, and quirky Somerville character and fear that the City they know and love will be lost through the gentrification that occurs partly as a result of the new transit. They argue that the people who have lived and fought for the Green Line deserve the opportunity to use it and must not be displaced.

There is widespread recognition that in the absence of pro-active strategies from the City and SCC, the Green Line station neighborhoods will likely follow the experience of the Red Line stations in Davis and Porter Square. The Red Line station areas once reflected the demographics of the City however, since the opening of the Red Line station in 1986, they are now more similar to the region in terms of income and property values. In the 1990 US Census, the tracts that roughly align with the Red Line station areas had median household incomes approximately 8 percent higher than the City of Somerville as a whole.<sup>40</sup> In 2000, the Red Line stations had median household incomes approximately 21 percent higher than the City. In 2004 the average cost per residential square foot was \$73 versus \$59 in the City of Somerville as a whole. While the introduction of rail transit likely had a strong impact, according to Somerville Housing Director Phil Erkolini, the end of rent control in Cambridge and location of Tufts University also affected the two neighborhoods.<sup>41</sup>

---

<sup>38</sup> Danny LeBlanc, interview by author, Somerville, MA., 12 February 2008

<sup>39</sup> “The Green Line” at the Nave Gallery: April 27-May 27, 2007. Accessed 3/26/08: <http://www.artsomerville.org/nave/2007/green.html>

<sup>40</sup> The Census geographies available for analysis in 1990 are slightly different than those used to create the 1/2-mile buffer in the 2000 Census. These comparisons are not exact and should be used for illustrative purposes only. Reconnecting America. 2008. “Somerville Equitable Transit-Oriented Development Strategy.” Unpublished report prepared for the Somerville Community Corporation.

<sup>41</sup> Phil Erkolini, meeting of Green Line land Use Committee. 11/16/07

### ***The Green Line as an opportunity for SCC***

Internal discussions in Fall 2007 at SCC focused on the Green Line as an opportunity for collaboration between the housing and organizing departments. Meredith Levy, Director of the Community Organizing Department said that by “forcing us both to go and work together on both a strategic and political level, SCC will have more power.”<sup>42</sup> However, as time has passed, only the community organizers are involved with the City and other partners in shaping the process. Director of Housing Development Kristin Blum explained that her time is totally focused on one specific development project; however she would like to be more involved with the Green Line process. This is a problem that must be overcome, as collaboration and communication between departments is key if SCC is going to be more effective.

The Green Line extension is also a motivating issue for SCC because it opens up new financing sources, development opportunities, and increased attention toward affordable housing. The Green Line is a major investment for Somerville and an opportunity to look strategically at the City’s needs and opportunity sites. Today there is a lot of attention focused on Somerville including the State, Federal Transit Administration, elected officials, and MBTA, all committed to making sure that the investment is successful. In addition, there is a tremendous amount of media attention toward the extension in local and regional newspapers. SCC and its allies are regularly interviewed to address the affordability issues and need for an inclusive community process.

While most staff and allies of SCC believe that the Green Line is a huge opportunity, Ezra Glenn, an SCC board member said, “it is not clear whether the Green Line will help us do our job. It will increase competition... In the past SCC could build at higher densities than private developers but new zoning will allow everyone this right.”<sup>43</sup> This comment highlights the point that while the Green Line presents several opportunities for SCC it also presents threats and challenges that must be considered. This is why a strategy that sorts out the internal response of SCC and the “context opportunity” is needed.

---

<sup>42</sup> Meredith Levy, interview by author, Somerville, MA., 15 February 2008

<sup>43</sup> Ezra Glenn, interview by author, Cambridge, MA., 21 March 2008

### ***The Green Line as a connector***

“The Green Line is a connector issue regionally,” explained Meridith Levy.<sup>44</sup> Through advocating for the Green Line, SCC forms new relationships with local groups dedicated to environmental justice, social equity, small businesses and open space. In the past, most work has focused on the eastern half of the City and the Green Line helps SCC connect with residents on the western half. SCC organizers actively participate with ACTION for Regional Equity, a coalition of 18 Massachusetts equity organizations united to address continuing disparities in affordable housing, transportation investment, and environmental justice.<sup>45</sup> These partnerships are instrumental because they enhance SCC’s capacity by increasing expertise, power, and credibility.

The Green Line has already brought in new resources for SCC, including an important grant from the Surdna Foundation. This three-year grant is being used to support work on land use and community planning around the proposed station stops to ensure that development is equitable, and includes affordable housing. In addition, Surdna supported the work of national non-profit Reconnecting America to analyze Somerville Assessor’s data and Census data to identify properties that are undervalued and therefore ripe for speculation. In addition, Reconnecting America provided case studies and recommendations to SCC.

### ***SCC’s role in the Green Line planning process***

SCC was invited by the City in November 2007 to join the Green Line Land Use Committee to develop a process for the City to shape the land use decisions around the Green Line. Other participants in the committee include representatives of the City Planning Department, Economic Development Department, Housing Department, Union Square Main Streets, Somerville Transportation Equity Partnership, Groundwork Somerville, and the Chamber of Commerce. While Lamboy verbally committed to an inclusive community planning process in February 2008, her office has gone ahead with the re-zoning of Union Square, including the development of transit-oriented development (TOD) zones with minimal input from the community (more details about zoning is included later in this chapter).<sup>46</sup> These zoning amendments will have a direct affect on the future Green Line. In response to SCC and the Union Square Neighbors’ call for community participation, the Union Square Re-Zoning Focus Group was created.

---

<sup>44</sup> Meridith Levy, interview by author, Somerville, MA., 30 January 2008

<sup>45</sup> For more information on Action for Regional Equity see: <http://www.policylink.org/BostonAction/>

<sup>46</sup> This is the third attempt to re-zone Union Square. The process was already long underway when Lamboy started her position in 2007.

## Assembly Square

Assembly Square is a 145-acre district surrounded by Interstate 93, rail tracks and the Mystic River. It is currently a wasteland of parking lots and strip malls. It took over a decade and several legal battles to reach an agreement between the City, developers, and community groups. All agreed that the Assembly Square Mall, a former Ford factory, and neighboring vacant industrial sites on the Mystic River should be redeveloped to improve Somerville's economy and commercial tax base. However, a debate occurred on the nature of the retail, access to the river, and traffic concerns. The agreement was reached in 2006 and IKEA and Federal Realty Investment Trust, the mixed-use project's developer, committed to investing \$15 million to help build the Orange Line stop between the Sullivan Square and Wellington stations. The development is proposed to include 2,100 new housing units, 1.75 million square feet of office space, 450,500 square feet of new retail and restaurant uses, a 62,000 sq. ft. cinema, a 200-room hotel and 310,000 sq. ft. IKEA store.

### Assembly Square Site Plan



Produced by Vanesse Hanen Brustlin, Inc.

### ***SCC scores a major victory with residents to increase linkage fee***

The rezoning of Assembly Square for big-box stores was at the forefront of community politics for a long time. According to some residents, the introduction of IKEA was crucial for job growth in Somerville. While others worried that Assembly Square would promote gentrification in historically affordable East Somerville. SCC entered the debate through its Affordable Housing Organizing Committee (AHOC) with concrete

suggestions for how the City's low- and moderate-income residents could capture the benefits and limit the harms of development. Organizing campaigns focused on increasing the linkage fee and creating a community benefits agreement with IKEA.

In August 2004, AHOC proposed to increase the linkage fee in Somerville to \$3.91, with the threshold project size remaining at 30,000 square feet. AHOC estimated that future developments in Assembly Square could translate into hundreds of thousands more dollars for the Affordable Housing Trust Fund.<sup>47</sup> Many of those who were involved in the campaign had never been politically active within the community before. Somerville Mayor Joe Curtatone announced his own linkage fee proposal, which would raise the exaction amount to only \$3.50 per square foot but would lower the threshold project size to 20,000 square feet. An additional \$0.50 per square foot linkage fee would be imposed for the creation and preservation of open spaces in Somerville. The Mayor's counter-proposal created a strategic dilemma for AHOC.

According to Levy, AHOC decided to push forward its campaign and move for a vote as fast as possible. As part of this effort, AHOC members organized informal meetings with each of the City's aldermen and with local residents. AHOC's suggested linkage fee increase was passed with a unanimous vote, resulting in AHOC's first major victory. At the same time, the Mayor was angry that his proposal was not passed.

### ***SCC scores a second victory on the IKEA Community Benefits Agreement***

In September 2007, SCC's East Somerville Neighbors for Change representatives and staff met at the Mayor's office to discuss IKEA, East Somerville, and jobs. They proposed the development of a community benefits agreement, which would provide a requirement of hiring local residents for jobs at IKEA. Four months later, the Mayor signed a deal with IKEA to provide Somerville residents with an early opportunity to apply for open positions, commit to priority review of East Somerville applications and provide funds for a job-training program. IKEA committed to contribute \$100,000 toward an employment-training program for Somerville residents and provide six computers to be placed throughout the City for use by residents applying for positions at the new store.<sup>48</sup>

---

<sup>47</sup> Agarwal, Nisha. "Somerville, Massachusetts." *The Next American City*. Accessed 3/2/08: <http://americancity.org/magazine/article/somerville-massachusetts-agarwal/>

<sup>48</sup> "IKEA, city agree Somervillians get first shot at Assembly Square jobs", *The Somerville Journal*, January 18, 2008. Accessed 2/1/08: <http://www.wickedlocal.com/somerville/archive/x1151549245>

While this can be viewed as another major victory for residents and SCC, all of the demands were not met. There will be no local advisory committee to oversee the agreement. According to insiders, secrecy plagued the process of the development of the agreement, which was signed by the Mayor and IKEA behind a closed door. One community member said that she was “disappointed but not surprised that the Mayor took all of the credit, while we were the ones to introduce the idea.”

### ***SCC and affordable housing at Assembly Square***

While the focus of development in Assembly Square is commercial, large development parcels in Assembly Square present the opportunity to capture affordability as part of new large-scale development. With 2,100 new housing units currently proposed, this will amount to a large number of inclusionary units. SCC has not yet focused on opportunities for involvement with the development or management of inclusionary units; however AHOC has discussed trying to increase the requirements to 15 percent. In addition, staff from SCC participated in on-going discussions with Bank of America Community Development concerning potential partnership opportunities at Assembly Square.

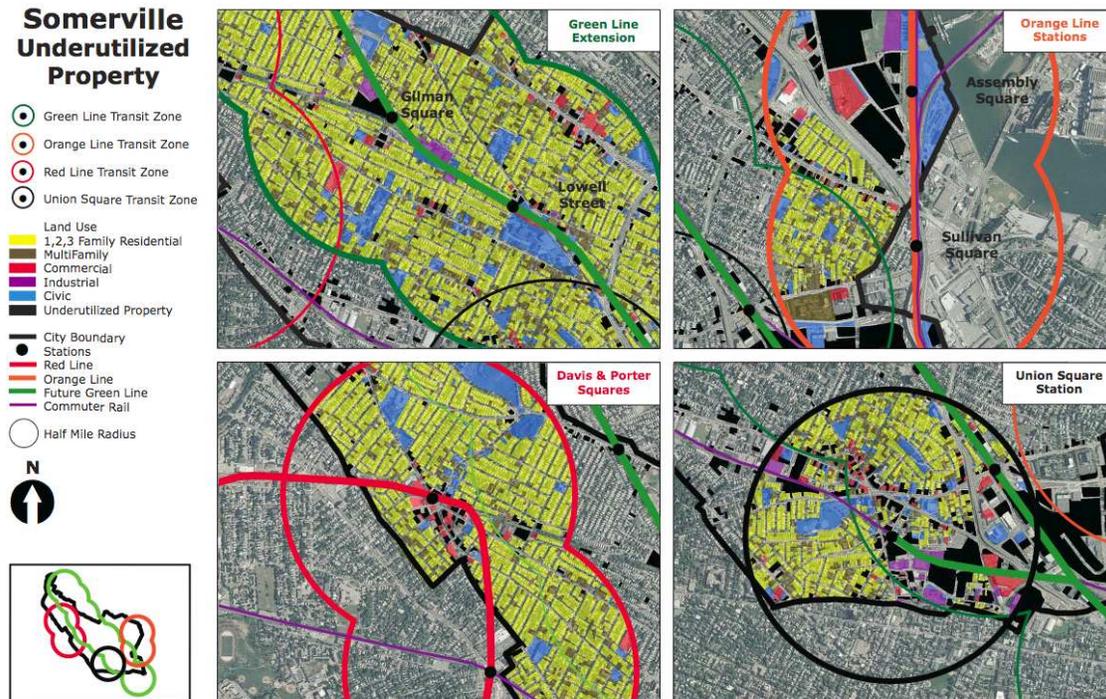
### **Union Square Re-Zoning**

Edgy, diverse, and vibrant, Union Square is the heart of Somerville. The Office of Strategic Planning and Community Development is expecting to submit revised proposed zoning amendments for Union Square (for the third time) to the Board of Aldermen for the third time in September 2008.<sup>49</sup> The goal of the zoning is to encourage denser development and more commercial opportunities. Lamboy believes that the existing zoning no longer fits with the current needs of Union Square. Over the past several years, ArtsUnion, the Mayor’s Office of Strategic Planning and Community Development, Union Square Main Streets and other partner groups have explored how zoning in Union Square can better support artists and arts organizations as well as unleash economic development within under-utilized parcels located in the Square, including municipally owned property.<sup>50</sup> SCC is committed to preserving the diversity of Union Square and sees opportunities for affordable housing development in the under-utilized properties.

---

<sup>49</sup> Mary Regan, interview by author, Somerville, MA., 22 April 2008

<sup>50</sup> Union Square Rezoning Focus Group Minutes, April 14, 2008



Produced by Reconnecting America, 2008

***SCC responds to the lack of transparency and resident involvement***

In February 2008, members of SCC’s Affordable Housing Organizing Committee (AHOC) met with the resident group Union Square Neighbors about the lack of transparency in the third phase of the re-zoning.<sup>51</sup> They discussed creating a task force and lobbied Alderman Tom Taylor. This resulted in the creation of the Union Square Re-Zoning Focus Group. While the development of the focus group is viewed as a success by AHOC, they are still concerned about the process and lack of representation from neighborhood residents. While AHOC is one of the only groups concerned with affordable housing, it formed alliances with others to help shape the process.

In May 2008, AHOC framed its position regarding the proposed zoning ordinance in regard to affordable housing and presented the following priorities to the Focus Group:

- Create a transit-oriented development (TOD) sub-zone with deeper affordability and measures to prevent displacement
- Increase inclusionary housing to 15 percent using the Somerville median income instead of the Area Median Income in calculating affordability.
- Encourage the development of rental and family units
- Lower the threshold amount and increase the linkage fee
- Keep inclusionary housing and linkage benefits in Union Square

<sup>51</sup> Mary Regan, interview by author, Somerville, MA., 30 April 2008

## **Conclusions**

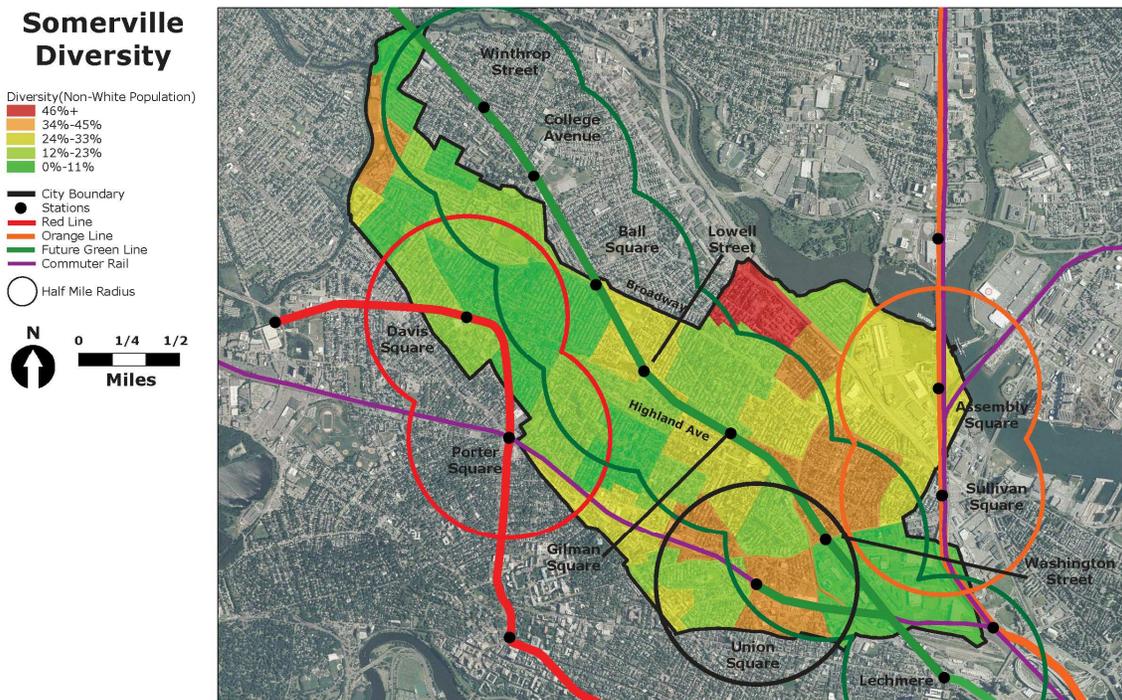
The Green Line extension, Assembly Square redevelopment, and the Union Square re-zoning, all present opportunities to meaningfully address the region's growing affordability crisis, but only if pro-active strategies are in place to preserve and develop housing. The City and SCC have several shared goals including denser development, increasing commercial opportunities, and preserving diversity and affordability.

## CHAPTER 4: GENTRIFICATION IN SOMERVILLE

A new frontier, the gentrifying City since the 1980s has been oozing with optimism. Hostile landscapes are regenerated, cleansed, reinfused with middle-class sensibility; real estate values soar; yuppies consume; elite gentility is democratized in mass-produced styles of distinction. So what's not to like? The contradictions of the actual frontier are not entirely eradicated in this imagery but they are smoothed into an acceptable groove.

Neil Smith, 1996

Somerville is a City of contrasts and diversity. The western half of the City surrounding Davis and Porter Square have been gentrified since the economic transformation brought forth by the opening of the Red Line stations in the 1980s. These neighborhoods are filled with million dollar homes, high-end boutiques, and restaurants. History is now poised to repeat itself in Union Square and East Somerville, the only remaining affordable enclaves in the City. While this may be good for some, these changes threaten the fragile balance of mixed-income, multi-ethnic communities. As the City booms, there is risk that longstanding residents who have contributed to the growth and diversity that define Somerville will be pushed out. SCC can learn from the anti-displacement and development strategies employed by other community development corporations.



Produced by Reconnecting America, 2008

## **The City's Response to Gentrification**

In addition to the private real estate market, City development policies are also contributing to the influx of development (and the resulting gentrification pressures) by implementing housing development policies that benefit market-rate, private development. At the same time, however, the City acknowledges the need to preserve affordability. Dozens of tools already exist in Somerville and are used by the Somerville Community Corporation and its partners to develop and preserve housing. The Affordable Housing Trust Fund was created in 1989 in order to provide for the creation and preservation of affordable housing in Somerville. In 1990, the City adopted an Inclusionary Zoning Ordinance, which requires that any development with 8 or more units reserve 12.5% of the units for low and /or moderate-income first-time homebuyers. In 1990, the Linkage Ordinance was also adopted to mitigate the affects of large-scale development on the supply and cost of housing in the City. However, these measures are not enough to address the continuing affordable housing crisis.

### ***Affordable Housing Trust Fund***

The Somerville Affordable Housing Trust Fund (SAHTF) was created to preserve and create affordable rental and homeownership units in Somerville and carry out programs to directly assist homeowners and renters. All of its activities must benefit low and moderate-income households (with incomes at or below 110% of area median income).<sup>52</sup> The Trust was initially capitalized by a \$400,000 allocation of municipal funds and federal program income. In addition, all linkage fees from commercial development in Somerville go to the Trust, as do payments made in lieu of units pursuant to the City's Inclusionary Zoning Ordinance. It also receives revenues from the repayment of Trust-funded loans to affordable housing developers, first time homebuyers and renters receiving security deposit, arrearage or other loans. To date, it has received \$1.5 million in resources.

### ***Housing Rehabilitation Program***

The Housing Rehabilitation Program offers deferred payment loans to income-eligible homeowners to assist in making needed repairs, improvements and the abatement of hazardous materials from the home. The average amount of money per rehab is \$25,000. The Program is designed to utilize both federal CDBG and HOME funds to improve the existing housing stock and to create and/or maintain affordable

---

<sup>52</sup> City of Somerville website. Accessed 4/28/08:  
<http://www.somervillema.gov/Department.cfm?orgunit=SAHTF>

rental units. Every participating property has an affordability period during which low and moderate-income owners agree to maintain the property as their primary residence and rental property owners agree to a rental restriction during which HOME rents and/or Fair Market Rents are not exceeded. The City has assisted 361 units and 150 rental units since the program was started and can currently fund around 30 rehabs a year on 2-3 family properties.<sup>53</sup>

The increasingly popularity of the program may stem from the current housing market and fact that people are not selling their properties but want to fix them up. The current wait-list is five years and interest is steadily increasing, partly because the City has done increased marketing of the program.<sup>54</sup> The City is proposing a 5 percent increase in this program for 2008-2009 to a total of \$656,138 in total CDBG and HOME funding.

### ***Inclusionary Housing Ordinance***

The Inclusionary Housing Ordinance requires that 12.5% of all units in new developments of 8 or more units be affordable. The City will likely adopt “transit-oriented development” zoning along the Green Line extension. This zoning would potentially create districts that include incentives for affordable development, mixed-use development, and office development.<sup>55</sup> Only 72 affordable inclusionary units have been created through the current program but the development of Assembly Square is likely to bring 263 affordable units either on-site, off-site, or the cash equivalent.<sup>56</sup> For rental properties, at least half the inclusionary units must be reserved for households with incomes equal to or less than 50 percent of the area median income (AMI) with the balance equal to or less than 80 percent AMI. For ownership units, at least half must be reserved for households equal to or less than 80 percent AMI, with the remaining at 100 percent AMI or below. The City is currently considering new incentives to developers for inclusionary housing.

---

<sup>53</sup> Dana LeWinter, interview by author, Somerville, MA., 2 April 2008

<sup>54</sup> Dana LeWinter, interview by author, Somerville, MA., 2 April 2008

<sup>55</sup> City of Somerville. “Five Year Consolidated Plan 2008-2013.” February 2008. Section 1: Housing, PP 47.

<sup>56</sup> City of Somerville. “Five Year Consolidated Plan 2008-2013.” February 2008. Section 1: Housing, PP 33.

### ***Linkage Ordinance***

The Linkage Ordinance requires that commercial development in excess of 30,000 square feet pay \$3.91 per square foot into the Housing Trust Fund to facilitate additional affordable housing activities.<sup>57</sup> Since 1991, the Trust has received over \$2 million in linkage payments and seed money from the City to fund affordable housing related activities. The City is currently studying alternatives to encourage greater payments.

### ***Preserving Expiring Use properties***

The City and nonprofit partners, including the Somerville Community Corporation, have long been committed to keeping all “Expiring Use” developments affordable. Since 1965, the federal government has supported the production of low-income rental housing primarily by giving subsidies to private owners of multifamily housing.<sup>58</sup> These “expiring use” properties have different deadlines when owners can choose to renew contracts or bring the rents to market rate. Twenty-two subsidized developments, containing 152 affordable units, will expire in the next five years.<sup>59</sup> The owner preserved the 224-unit Cobble Hill Apartments in 2002 through a 15- year Section 8 contract renewed. The 500-unit Clarendon Hill Towers was preserved in the early 1990s through a resident association buyout.

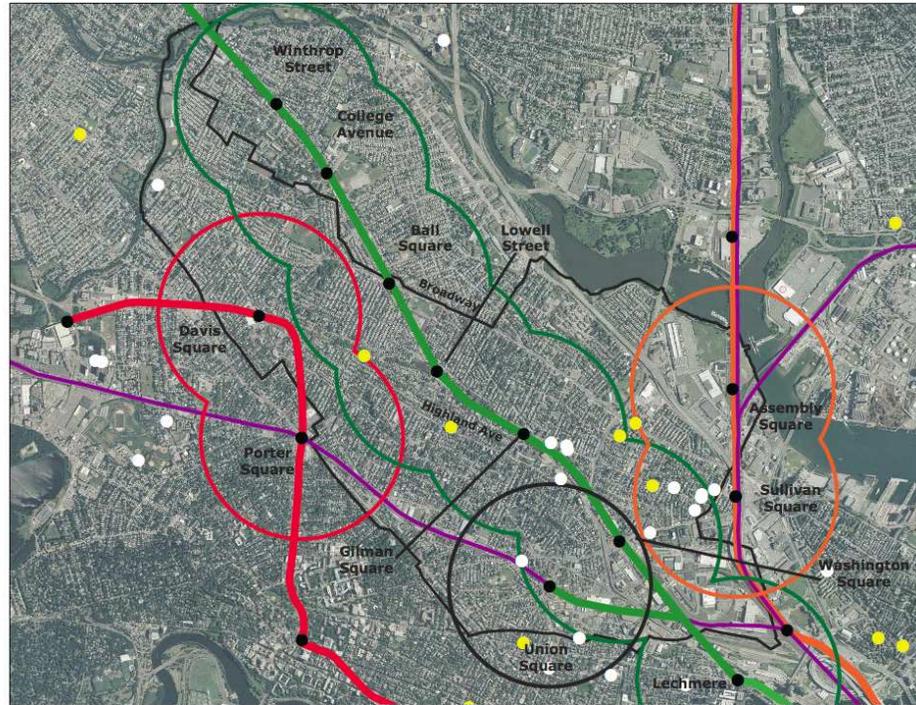
---

<sup>57</sup> City of Somerville. “Five Year Consolidated Plan 2008-2013.” February 2008. Section 1: Housing, PP 1.

<sup>58</sup> PolicyLink website. Accessed 3/9/08: <http://www.policylink.org/EDTK/ExpiringUse/>

<sup>59</sup> Dana LeWinter, interview by author, Somerville, MA., 25 February 2008

## Somerville Housing



Produced by Reconnecting America, 2008

### **Section 8-rental housing and project-based vouchers**

Section 8 housing assistance is a federally funded rental assistance program, which subsidizes rental costs for those who meet or fall below income limits set by the U.S. Department of Housing and Urban Development (HUD). Since 1975, the City public housing program has administered the use of various housing vouchers for both tenants and properties. Those who receive property-based vouchers live in properties subsidized by HUD and receive assistance only as long as they live at the same property; tenant-based vouchers allow renters to move from one property to another. While this program attempts to help alleviate the housing crisis, it is not enough.

### **Why current development and preservation efforts in Somerville are not enough**

While City strategies are expanding the housing stock and providing housing options at all income levels, the supply of affordable housing is at particular risk. Affordable housing preservation policies, such as the housing rehab initiative and Section 8, are necessary measures toward providing quality housing for low-income families, however once again fall short. The strong real estate market is hindering the effectiveness of these policies as some landlords attempt to profit from higher rental prices and market-rate development in the City. The City's preservation policies are inadequate in protecting the loss of affordable housing. The Housing Trust Fund is not able to meet all the needs of affordable housing development.

## Lessons Learned from CDCs in Gentrifying Cities

To prevent the massive displacement of the vibrant communities of low-income residents, SCC must embark upon new efforts to stabilize and support existing communities and do new development. Fortunately, the Somerville Community Corporation is not the only community development corporation (CDC) working in gentrifying communities and can learn from the strategies, successes and failures of others. Many CDCs are situated in gentrifying neighborhoods and face questions, internally and externally, about defining their role in this environment. Boston, Los Angeles, New York and other cities have CDCs that pursue strategies specifically in response to the forces of gentrification. Techniques used by CDCs in gentrifying communities fall within four categories.<sup>60</sup>

1. Help residents understand gentrification and how to navigate threats as well as opportunities through community planning and negotiating benefits agreements
2. Enhance community pride through festivals and organizing campaigns
3. Build individual capacity through job training and financial literacy education
4. Partner with other non-profits and for-profits to increase political power and develop projects on large parcels

One of the major lessons learned from CDCs in gentrifying communities is the importance of collaboration between all departments and staff members. It is necessary for staff to recognize that while development and organizing tools may look and seem different they need to be implemented together in order for the CDC to be successful.

### ***What makes an effective CDC?***

The criteria to define “effective” differ markedly between organizations. Success does not only relate to the number of units built, families housed, or size of the organization. For Meridith Levy, success means that the community is controlled by the people who live in it.<sup>61</sup> Necessities for CDCs include strong coalitions, clear missions, sound management, and skilled board and staff leadership.<sup>62</sup> In the most successful CDCs, residents create the vision for neighborhood revitalization, establish goals and provide oversight. Effective CDCs do not just respond to opportunities but create them,

---

<sup>60</sup> NeighborWorks. 2005. “Managing Neighborhood Change: Best Practices for Communities Undergoing Gentrification.” PP 5.

<sup>61</sup> Meridith Levy, interview by author, Somerville, MA., 28 January 2008

<sup>62</sup> Litwin, Janice and Janet Lansberry, William Slotnik and John Vaughm. “Effective Community Development” *Shelterforce Online*: Issue # 76, July/August 1994. Accessed 4/25/08: <http://www.nhi.org/online/issues/76/comdev.html>

with the guidance of a Strategic Plan. Specific projects take place based on recognition of the broader context of neighborhood strategies. The most effective CDCs regularly assess their projects against the mission and neighborhood needs.

### **Conclusions**

Gentrification is a reality in Somerville, and SCC needs to coordinate its development and organizing activities to anticipate, plan, and direct change. There is a long debate surrounding the ability of CDCs to both organize and challenge power while also developing housing.<sup>63</sup> The leadership at SCC has long been involved with the Ricanne Hadrian Initiative for Community Organizing (RHICO), a funding and learning program that supports organizing by CDCs. SCC leaders have learned at RHICO and from other CDCs that they must pursue organizing campaigns that engage the overall work of the organization, in order to enhance the role of community organizing in carrying out development objectives, and to promote more inclusive development practices among them. The following chapter provides an analysis of SCC, providing a link between previous chapters and the strategies proposed.

---

<sup>63</sup> Stoeker, Randy. 2002. "Community Organizing and Community Development: Apples and Oranges? Chicken and Egg?" Accessed 3/19/08: <http://comm-org.utoledo.edu/papers.htm>.

## **CHAPTER 5: ANALYSIS OF SOMERVILLE COMMUNITY CORPORATION**

### **INTERNAL AND EXTERNAL CAPACITY**

The Somerville Community Corporation has a long history and regularly adapts to the changing market and needs of residents, while staying true to its mission. As discussed in Chapter 1, SCC has gone through many transformations; it started as a service provider and now focuses on organizing and development projects. Danny LeBlanc, SCC's CEO said SCC is again at a crossroads because the "Green Line is the biggest thing to happen in Somerville and SCC needs to take a leadership role."<sup>64</sup> The leaders want SCC to be in a position to empower residents, influence development decisions, and prevent displacement.

Before developing and pursuing strategies that will be successful on the organizational, community, and political levels, SCC must look within and without to enhance its internal capacity. A major aspect is improving coordination and collaboration within the organization. This chapter analyzes SCC's current capacities and judges that situation in light of development opportunities. This includes an analysis of the dilemmas connected with the current status of the organizational, network, political, and resource capacities, which will collectively determine SCC's ability to move forward.<sup>65</sup>

#### **1. Organizational Capacity: Two Steps Forward and One Step Backward**

Organizational capacity is defined as the ability of the staff, board of directors, and others to carry out the mission of SCC.<sup>66</sup> Increased organizational capacity results in the ability to engage in a greater number of more complex activities. SCC has made a major comeback since the 1990s and rebuilt itself as the affordable housing developer in Somerville, ready to address complex changes. SCC has also developed a strong capacity as a community organizer on affordable housing and neighborhood quality of life issues. Because funding, staff time, and monetary resources are scarce, SCC tries to creatively overcome these obstacles through empowering residents, taking on important development projects, and building alliances. The following section focuses on the

---

<sup>64</sup> Danny LeBlanc, interview by author, Somerville, MA., 19 March 2008

<sup>65</sup> The framework and elements studied in this chapter to measure capacity are based on the work of Norman Glickman and Lisa Servon (1998).

<sup>66</sup> Glickman, Norman and Lisa Servon. "More than Bricks and Sticks: Five Components of Community Development Corporation Capacity." *Housing Policy Debate*, Volume 9, Issue 3. PP 512.

internal dilemmas related to management, staff, board of directors, and inter-departmental collaboration.

***Does SCC need a visionary leader or a manager?***

The leadership demands of SCC are shaped by the market, political administration, and needs of the low-income residents. Over the course of its history, both visionary leaders and managerial leaders have run SCC. Visionary leaders Taylor and Shelton, CEOs in the 1980s and 1990s had grand plans for SCC but left the organization in debt and isolated from its base. Mainzer-Cohen was a clear manager and laid off staff while increasing funding, political relationships, and credibility for the organization. Today, the organization is taking on ambitious projects, losing staff, and in debt again. However, LeBlanc, the current CEO, has the reputation, historical knowledge, and vision to lead SCC to greater effectiveness.

A resident of East Somerville, LeBlanc is proud and dedicated to Somerville. He sits on several boards, attends community meetings, sends his kids to Somerville public schools, and rides his bike through the dense residential streets. According to former SCC senior project manager Katie Anthony, “Danny has the ability to make people comfortable. People trust him and he is reliable. Most importantly, he can hold his own with the Mayor.”<sup>67</sup> LeBlanc has social-activist and community organizing roots, and shifted the focus of the organization to building its base rather than mainly on development projects. Some believe that he is more dedicated to organizing, however a recent shift in SCC offices has planted LeBlanc’s desk in the heart of the Housing Development Department.

In the mid-2000s a Deputy Director was hired to work on fundraising and managing the staff. However, a budget crisis resulted in the loss of this position for the time being. In the meantime, LeBlanc is responsible for managing both the internal organization as well as fundraising and serving as the outside face of SCC. His office door is almost always open and he is extremely sincere, and generous.

***Why is the organization getting smaller?***

SCC has a small, dedicated, and intelligent staff. Until recently, the organization contained three departments including Supportive Services, Community Organizing, and Housing Development. SCC staff size has decreased in recent years and includes 2 members working on housing development, 3 doing community organizing, 2 in support services, and 3 administrators including the CEO. Trainings and weekly staff meetings

---

<sup>67</sup> Katie Athony, interview by author, Somerville, MA., 24 January 2008.

are a clear priority as well as the hiring of outside consultants. Lack of funds led to layoffs in 2007 of the Deputy Director and Director of Support Services. The Board and LeBlanc recently decided to combine the Support Services Department with the Community Organizing Department. Recently there has been some more turnover, with the departure of a senior project manager in the Housing Development Department to the private sector. While she had only been with the organization for four years, this is longer than most current staff. A small budget and a lack of development projects in the pipeline resulted in the decision to hire a consultant rather than a replacement. These are signs of an organization that is struggling financially.

### ***Building power through organizing?***

LeBlanc said that SCC “is not about forming a political power base... (but) working with any group to get things done” and to create “a sense of shared accountability.”<sup>68</sup> The Organizing Department helps garner more respect for SCC in some communities, while posing threats to some community institutions. SCC organizers embrace these conflicts because they want to alter existing community dynamics. Organizing around issues of inclusiveness and diversity helps SCC build its own power, as defined by its ability to mobilize residents around a vision for development and change. However, there is always a balancing act between meeting the most pressing needs of low-income residents, building SCC’s membership base, meeting the mandates of funders, and supporting SCC’s other activities. Because SCC is so small, the Organizing Department only focuses on a few campaigns at a time.

Over the years, organizing staff has assembled a strong constituency in Somerville. As a result of SCC’s organizing work, over 100 people turned-out in support of increasing the City’s Linkage fee, with 25 residents testifying in favor and not a single person testifying in opposition. In addition, SCC established the East Somerville Neighbors for Change (ESNC) engaging dozens of people from East Somerville who previously perceived they had no direct outlet to address issues of concern. SCC successfully builds power, credibility, and change through organizing.

### ***Building power through real estate development?***

Housing is at the core of the mission and hundreds of people have benefited from SCC’s projects. SCC purchases property from the private market, renovates existing buildings, and develops new housing. SCC completed the rehab of 109 Gilman

---

<sup>68</sup> Greenberg, David Micah. “Ways of Contending: Community Organizing and Development in Neighborhood Context.” (PhD diss., Massachusetts Institute of Technology, 2004) PP 69.

Street in 2007. This six-unit rental property along the Green Line corridor was purchased from the private market with funds provided by the City and others. SCC renovated the building and retained its low-income tenants.

In 2006, following a competitive bidding process SCC was named by the Catholic Archdiocese of Boston to purchase the former St. Polycarp's church property, a 3.1 acre site in the Eastern half of Somerville. This development project is SCC's largest in its history. Development and organizing staff members worked as a team not only to develop a competitive bid and community-based plan, but also to position SCC as the only bidder with strong community participation and support for their bid. However, the project was not highly desired by investors because of the current market and it is seen as overly complicated, according to LeBlanc. In April 2008, he said that the project "sapped us and we owe a lot for acquiring it."<sup>69</sup> While staff members in the Housing Development Department have focused much of their energy on making sure that this project is successful, other aspects of their work including pipeline projects were stalled.

The Real Estate Committee includes SCC members who are lawyers, project managers, and a private developer. The committee was started in 2002 to create criteria for evaluating projects and provide feedback and advice on various development projects. Several new members are active on the committee.

### **SCC's Gilman Street and Linden Street Apartments**



### ***Building power through both community organizing and real estate development?***

One of the critical organizational dilemmas is whether SCC can do both community organizing and affordable housing development. While it was started as a purely development organization, its mission shifted in the mid-1980s to include organizing. As mentioned above, SCC leaders, including LeBlanc, have been actively

---

<sup>69</sup> Danny LeBlanc, interview by author, Somerville, MA., 12 March 2008.

engaged in regional discussions about the ability of CDCs to effectively develop and organize. As a former organizer, LeBlanc is a strong believer in SCC's ability to do both well. However, the departments often operate in virtual silos, partly because staff members are overextended. Organizing campaigns often pit SCC against the City and private developers, which has negative consequences for the Housing Development Department, which relies on support and funding from the Mayor and his administration. The issue of "biting the hand" that feeds SCC is a critical issue that deserves the attention of the leadership.

The East Somerville Initiative (ESI) is an example of the departments collaborating successfully. The initiative included a community planning process designed to focus on revitalizing East Somerville. SCC convened a series of community planning meetings with neighborhood residents, businesses, organizations, City planners, aldermen, and other stakeholders to create a vision, set of principles, and plan of action for neighborhood improvement and stabilization that minimizes the displacement of current residents and small businesses. SCC staff from both departments attended the meetings. ESI was successful because as a result of the planning and organizing work, a strong community-based leadership now has the power to publicly lay claim to their community, and to harness their political power to influence policies, land-use, services, and economic development. SCC continues to help build this power among low-income individuals and families by working with them to identify their own needs, strengthen relationships with each other, and develop their organizing and leadership capacities.

SCC staff plan to continue to collaborate with this network of stakeholders and leaders, to preserve and expand quality affordable rental and ownership housing opportunities, strengthen the predominantly immigrant business district, facilitate access to support services and programs, and ensure that major transportation changes benefit local community residents. An inventory of properties in East Somerville that are or may be up for sale was completed but SCC has not pursued any properties. While the staff describes the East Somerville Initiative (ESI) as a success in empowering residents and building the base, other organizing campaigns pit SCC against City Hall.

***What is the role of members?***

Members are given the opportunity to participate in SCC's activities in various ways. Leadership training events, fundraisers, and the annual meeting are some examples of membership opportunities. The organizing campaigns are predominantly

shaped and carried out by the Affordable Housing Organizing Committee (AHOC) and East Somerville Neighbors for Change (ESNC). Around ten SCC members participate in monthly AHOC meetings and are in regular communication through email.

***Representative board vs. rich and connected board?***

One of SCC's long-standing principles is community control of its board. LeBlanc prioritized finding the right leaders for the Board of Directors during his first years as CEO. In the past, business owners and elected officials served on the board. However, LeBlanc believes boards that fully represent the "community" bring legitimacy. The Board of Directors contributes to leadership development and acts as a training ground for new members. Elections are not competitive and LeBlanc and others nominate board members who are approved during the annual meeting by the membership base. The process is very informal and there is no limit on the number of members. The fact that SCC does not currently include any corporate or business interests on its board may help build its reputation for being responsive and accountable to residents.

While members may be available to help and review documents and advise LeBlanc, they are not involved in the affairs of the organization unless there is a major crisis. Board members are encouraged to participate in committees; however attendance is often poor because they are very busy. In addition, participation in board meetings usually includes only half of the members. However, several board members participate in door knocking campaigns and other organizing projects.

***Are strategic planning exercises enough?***

In general, SCC has been steadily increasing its efforts to gather better, more comprehensive overall data, and use it to assess how it is doing. SCC completed a strategic planning process in 2004 and is gearing up to begin a new plan in 2009. Annual progress reports include assessing number of units of affordable housing that are preserved each year, and how many units of affordable housing, rental and ownership, SCC acquires and/or develops over time. SCC evaluates and documents the results of every campaign, public events, and meetings with all involved (community members, staff, board members), examining whether goals are accomplished.

While LeBlanc believes in the merits of strategic planning, he is concerned that the 2004 Strategic Plan led the organization to grow too quickly. The creation and demise of the Supportive Services department was partly blamed by LeBlanc on the Strategic Plan. Staff argues that the process of developing the plan was very effective but reflection on progress and updates are needed more regularly.

## **2. Networking Capacity: If always collaborating, will SCC ever get its own house in order?**

SCC has developed a strong reputation as a dedicated collaborator through its work in the past several years. SCC is currently engaged in numerous partnerships with actors within Somerville and outside to complete development projects, physical revitalization and anti-displacement activities. Staff and board members have a voice in local and regional governmental and civic associations that advocate for and carry out affordable housing development and other social justice and regional equity priorities. SCC staff participate in several important networks, including the Ricanne Hadrian Initiative for Community Organizing, ACTION! For Regional Equity, and Citizens Housing and Planning Association, all providing plenty of opportunities to exchange information, strategies, models and support through group discussions, publications, and online forums. However, networks and alliances pose their own dilemmas that need to be addressed in order for SCC to become more effective.

### ***What are the ingredients that make collaboration successful?***

SCC has successful and long-term partnerships with service providers in Somerville, for both development and organizing activities. In order to assist tenants at risk of becoming homeless, SCC works with the Somerville Homeless Coalition, Community Action Agency of Somerville, and the Greater Boston Legal Services to create the Save Our Homes Walk, now in its fifth year. Organized by SCC's Affordable Housing Organizing Committee (AHOC), the Walk raises money to help those at risk of homelessness to secure housing by providing assistance with security deposits, back rent, or moving costs. In addition, the service providers bring-in federal funding sources to house both formerly homeless and those at risk of becoming homeless. Because these service providers lack development expertise they partner with SCC. These funds often fill important gaps in SCC's development projects and meet an important need in Somerville.

### ***When to collaborate? When to go it alone?***

SCC is a small organization with a huge mandate. Leaders recognize the necessity of building strong alliances in order to make its vision a reality. However, as the only organization in Somerville dedicated to affordable housing, diverse groups invite staff to dozens of meetings each month. While it is important for SCC to build relationships, support allies' causes, and get its message out, staff capacity is limited.

SCC is currently in the process of developing a community planning process for the Green Line extension with several core partners including the Somerville Transportation Equity Partnership (STEP), Groundwork Somerville, and the City of Somerville. Other groups that are loosely involved in this planning process include Friends of the Community Path, Somerville Arts Council, Tufts University, and CAAS. While each group represents diverse constituencies and demands, SCC plays an important role in influencing decision-making.

**Why partner with SCC?**

Over the years SCC has developed many strong relationships but has also isolated some key groups that are needed for current work around preserving and developing affordable housing. Dana LeWinter, Director of Special Projects at the City’s Housing Department counted one of the reasons to work with SCC is that they “cover the gamut of housing issues and are well respected,” in addition they are the one community development corporation in town.<sup>70</sup> In an effort to understand the benefits and limitations of partnering with SCC, the following charts its assets and liabilities.

**SCC’s Assets and Liabilities as a Development and Community Organization**

	<b><i>As a Development Organization vs. For-Profit Developers</i></b>	<b><i>As a Community Organizer vs. Other (Non-Development) Community Organizers</i></b>
<b><i>SCC’s Assets</i></b>	<ul style="list-style-type: none"> <li>• Ability to organize residents in support of redevelopment policies and projects.</li> <li>• Ability to secure support from public agencies.</li> <li>• Ability to act as coordinating agency for public investments</li> <li>• Brings credibility from past successful projects.</li> </ul>	<ul style="list-style-type: none"> <li>• Brings resources into the neighborhoods.</li> <li>• Brings connections to City, state, and national supporters.</li> </ul>
<b><i>SCC’s Liabilities</i></b>	<ul style="list-style-type: none"> <li>• Is often cash-starved since funding sources are limited and developments do not bring in much money.</li> <li>• Has difficulty bringing projects on line efficiently and at low costs.</li> <li>• May be seen as overly “political.”</li> </ul>	<ul style="list-style-type: none"> <li>• Can be distracted from community purpose due to organization needs and pressure from stakeholders and funders.</li> </ul>

<sup>70</sup> Dana LeWinter, interview by author, Somerville, MA., 29 January 2008.

### **3. Political Capacity: a careful balancing act**

Political capacity manifests itself in many ways including community participation, political leverage, educated constituents, and conflict management.<sup>71</sup> It refers to SCC's influence with government officials and credibility in the community. Over the years SCC has found it challenging to build political capacity with government officials because as described earlier, organizing campaigns are often very critical of City decisions.<sup>72</sup> However, local government resource commitments are critical to SCC's activities so positive views by elected officials and agency staff are vital to its ability to garner the support needed to improve neighborhoods. In addition, SCC and the City share many of the same goals.

"The City fears SCC as a credible threat," according to one local insider. SCC has the ability to turn out hundreds of residents at meetings, which bring power and credibility to the organization. In addition, the City is also dependent on SCC, because it is the only community housing development organization in Somerville. It is an interesting balancing act and creates many dilemmas for SCC. At the same time, according to transportation activist Ellin Reisner, "SCC is constrained by the City" because it is "cash-poor" and in need of projects with higher returns than affordable housing.<sup>73</sup>

#### ***How to negotiate the relationship with the City?***

Even if concrete resources are not always forthcoming, the Mayor often supports the value of SCC. Each needs the other, as the City is dependent on SCC to serve the important role of affordable housing developers.<sup>74</sup> Under LeBlanc, SCC has improved relationships with local officials. Staff and board members have spent time educating public officials about increasing inclusionary housing requirements and the importance of preserving affordability along the Green Line extension. The Mayor and legislators were pushed from indifference to unanimity on the linkage fee increase because AHOC and local citizens were added to the mix of housing policy experts, legal services lawyers, and professional organizers arguing on its behalf.

However, the Mayor often takes credit away from SCC, which causes further issues. LeBlanc and staff are concerned that if SCC becomes too connected to the

---

<sup>71</sup> Glickman, Norman and Lisa Servon. "More than Bricks and Sticks: Five Components of Community Development Corporation Capacity." Housing Policy Debate, Volume 9, Issue 3. PP 527.

<sup>72</sup> Danny LeBlanc, interview by author, Somerville, MA 28 February 2008.

<sup>73</sup> Ellin Reiserder, interview by author, Somerville, MA 25 January 2008.

<sup>74</sup> Dana LeWinter, interview by author, Somerville, MA 28 February 2008.

administration they may run the risk of being co-opted by the administration and losing credibility with the community. Therefore, LeBlanc often has regular conversations with the Mayor Curtatone before launching major organizing campaigns. The staff and board members of SCC spend a lot of time discussing the risks and possible outcomes of every project.

***Does SCC truly represent the “community”?***

SCC is a political player and works with community residents to argue for policy positions that support affordable housing. SCC prides itself in the ability to quickly turn people out to serve as advocates at important meetings. For the East Somerville Initiative over 350 people attended the October 2007 Summit.<sup>75</sup> In addition to community organizing campaigns, SCC always engages the community in planning exercises for development projects, which often adds time and money to the process. SCC seeks out community residents to serve on committees and attend neighborhood meetings. Empowering community members and nurturing leaders is a key part of SCC’s mission.

**4. Resource Base: good work and not enough money**

SCC has strong connections to the communities in which it works but its funding base is narrow and board and staff capacity has not kept up with increases in programmatic responsibility. One of the major dilemmas that SCC faces is whether to follow the money, follow the strategy, or how to do both. The Somerville Community Corporation’s ability to generate resources from grants, contracts, loans, and other sources has grown over the years.<sup>76</sup> However, rising development costs, increased competition, flat federal funding, and ups and downs in State and local funding further squeeze SCC’s resource base. SCC’s stated priorities for future organizational improvements call for strengthened fundraising; however several dilemmas described below are needed to be addressed.

***Good work vs. good money?***

SCC does not seek out the most profitable transactions and often undertakes the hardest, least profitable developments in Somerville. The strategy of doing good work may be in conflict with the strategy of making enough money to expand. SCC redevelops badly deteriorated buildings or properties that cannot be fixed for a cost that

---

<sup>75</sup> Meridith Levy, interview by author, Somerville, MA., 29 January 2008.

<sup>76</sup> This is shown in the 2005, 2006, and 2007 annual reports available on SCC’s website: [www.somervillecdc.org](http://www.somervillecdc.org)

can be recouped with rents that low-income people can afford. SCC's community organizing work drives them to take on neighborhood planning and other activities that impose additional organizational costs. However, SCC gets a good amount of grant revenue to support organizing activities.

Today SCC is pursuing ventures that may bring in more money, even if it doesn't directly help community residents. This includes the market-rate component of the Saint Polycarp Village project. Expanding housing development into surrounding communities like Medford is being considered by the leadership as an opportunity to broaden its base and develop more units.

***What are existing funding sources? Where are the gaps?***

SCC engages with a diverse number of stakeholders to mobilize and channel resources to fund its activities as well as the neighborhoods in Somerville. SCC receives project and operating support from the Local Initiatives Support Corporation, Surdna Foundation, United Way, Massachusetts Department of Housing and Community Development, the LIFE Initiative, Massachusetts Housing Partnership and others.<sup>77</sup> However, SCC exists in an uncertain funding environment, which is further threatened by the current sub-prime and foreclosure crisis. It is difficult for SCC to look ahead while funding sources are unknown.

City government resource commitments are critical to SCC's activities. SCC is the City's chosen Community Housing Development Organization (CHDO). SCC receives 5% of the City's annual HOME Program entitlement grant to operate its non-profit housing development department (\$43,267 in 2008.)<sup>78</sup> In addition, 15% of the annual HOME Program entitlement grant is provided to the Somerville Community Corporation (new entitlement funds of \$129,802).<sup>79</sup> These funds can be used to acquire, demolish and create affordable housing units within the City of Somerville.

The Somerville Affordable Housing Trust Fund (SAHTF) also provides funds for SCC's development projects and activities. While this is an important source for SCC it is also very small.<sup>80</sup> In 2007, SCC was able to secure a new contract with the Somerville Affordable Housing Trust Fund to increase the funds available to assist with tenants

---

<sup>77</sup> Somerville Community Corporation 2007 Annual Report.

<sup>78</sup> City of Somerville. "2008-2009 HUD One Year Action Plan Executive Summary." February 2008.

<sup>79</sup> City of Somerville. "2008-2009 HUD One Year Action Plan Executive Summary". February 2008.

<sup>80</sup> City of Somerville website. Accessed 2/12/08:  
<http://www.somervillema.gov/Department.cfm?orgunit=SAHTF>

facing emergency payment situations, and a new Housing First grant from the United Way in recognition of the value of SCC's integrated approach to meeting the housing needs of the lowest incomes residents.

Even though SCC earns fees from the projects it builds, it cannot fully pay for internal operations.<sup>81</sup> For example, the fee for the Gilman Street redevelopment project was extremely low because it was small and SCC partnered with the Somerville Homelessness Partnership to use McKinney funds to develop 2 units for homeless housing.<sup>82</sup> It is important to note that SCC's developer fees are considered contingency and the "fee" portion isn't paid until a project is finished. If there are cost overruns beyond contingencies they worked into the budget, it's taken out of the fee. SCC's new construction projects usually take around 4 years from identification of possible site to completion. According to SCC Housing Director Kristin Blum, the developers' fees don't usually cover the costs of the staff time that go into them. An ideal project covers the staff costs of developing the housing and other staff costs or organizational costs.

### **Conclusions**

Over the last eight years, SCC rebuilt its capacity and reputation as the affordable housing developer in Somerville. Today, there are tremendous opportunities for organizational growth. However, the Somerville Community Corporation needs to resolve the organizational, networking, political, and resource dilemmas described in this chapter in order to. The Green Line provides an opportunity for SCC to look pro-actively at the housing needs of the low and moderate-income residents, and strategize with a community base around where they might like to see affordable housing and then use development and organizing approaches to claim this land as a "community benefit." The following chapter provides realistic strategies that will help enhance SCC's capacity by supporting collaboration and coordination between SCC's activities and departments.

---

<sup>81</sup> Kristin Blum, interview by author, Somerville, MA., 12 February 2008.

<sup>82</sup> Kristin Blum, email message to author, 9 May 2008.

## **CHAPTER 6: STRATEGIES FOR THE SOMERVILLE COMMUNITY CORPORATION**

Somerville is a city that welcomes change and diversity. Citizen participation and neighborhood pride are what Somerville is known for. Residents want the Green Line, re-zoning of Union Square, and redevelopment of Assembly Square and are vocal about their visions, hopes, and concerns. With the introduction of the Green Line and these other projects, a lot of change is expected to come to Somerville. There are both positive and negative aspects of this change including increased accessibility, improved amenities, and threats to affordability. The Somerville Community Corporation faces a lot of hard choices on how to grow as an organization while improving Somerville, preventing displacement, preserving diversity, and increasing affordability. Strategies proposed in this thesis to help SCC become more effective must stem from a shared vision both within the organization and with the City and other stakeholders.

SCC cannot anticipate, plan, and develop affordable housing alone but must collaborate with the City and other partners. In order for SCC to be most effective at impacting and directing this change, the internal capacity of the organization must be enhanced through better involvement of members and Board of Directors, increased collaboration among departments, and greater organizational assessments. This thesis proposes several strategies to improve the capacity of the organization through the identification of neighborhoods vulnerable to displacement, empowering residents around specific development projects, and preservation of existing affordable housing.

### **Development of a Shared Vision for Change**

Increasing the effectiveness of SCC and sustaining the diversity of Somerville takes more than improved technical skills and enthusiasm, it means nurturing a vision. There needs to be an internal vision developed within the organization as well one that grows out of a community-controlled planning process that includes critical stakeholders in developing and agreeing to a vision, a set of principles, and a suggested plan of action for neighborhood improvement and stabilization. While in the past the City has not gone to SCC to think about change, now is the time for increased collaboration and the sharing of expertise and resources. Affordability and diversity will only be preserved and enhanced in Somerville if the City and SCC can work effectively together.

The City and SCC agree that the Green Line has terrific potential to deliver on its promises of reduced congestion, livable neighborhoods and greater economic competitiveness, but its success is dependent on the kind of development that grows up around new and existing transit stations. The City and SCC are dependent on each other to carry out several important activities including affordable housing development and preservation. In addition, they share goals including attracting new and denser development, increasing amenities, and maintaining diversity. SCC is an important partner for creating and nurturing a vision with the City because it has the trust of residents, and the proven ability to collaborate with diverse players to define issues and design solutions. In addition, the City has the power to help fund a community process, implement policies, enact zoning changes, and distribute financial resources and incentives.

The first step in developing this vision is creating an inventory of change. Through a door knocking campaign, small community meetings, and resident-led neighborhood tours, SCC can gather anecdotal evidence of where change is already occurring and what properties and neighborhoods are most vulnerable to displacement. At the same time, the City can gather more quantitative data on the physical landscape and impacts of its policies. Both efforts should enforce the other. SCC, the City, and other partners must facilitate the development of a shared vision and resulting neighborhood-wide plans. The process will help SCC and the City recognize its shared goals and how their work can be mutually supportive. This vision will help SCC have a far more positive and long-lasting impact than just focusing on scattered sites across the city. However, in order for SCC to nurture this vision, the organization's internal capacity must grow.

### **Strategies to Increase SCC's Internal Capacity**

Increasing the effectiveness of SCC takes more than improved technical skills and enthusiasm. SCC cannot afford to take a reactive mode when it comes to housing development but must focus on implementing its mission and vision. This requires strengthening the role of the Board of Directors and empowering members to have a greater voice in decision making. In addition, greater collaboration and coordination among the departments needs to take place through organizing, development, and preservation activities.

### ***Increased opportunities for participation by members***

SCC demonstrates a healthy relationship between resident leadership and technical expertise. Building a strong base within working class and immigrant communities for planning around the Green Line extension is critical, as low-income communities in Somerville have historically been disenfranchised from policy and development decisions. Members should be encouraged to participate in leadership training events, serve on committees, and take an active role in shaping the future of the organization.

### ***A more engaged Board of Directors***

The community-led Board of Directors is an important venue to grow leaders, and SCC has made great progress in recent years on this front. Board members have important historic knowledge and expertise that must be utilized. Now is the time for the Board of Directors to become more engaged with fundraising for the organization. While there are important benefits of a community board, the leadership should also consider recruiting members with more connections to foundations and other funding sources.

### ***Collaboration among departments for project selection***

While the vision developed with the City and other allies is important, a strategy developed internally for how SCC will anticipate and respond to the changes coming from the Green Line extension is needed. The current strategy of project-by-project developments in sites scattered across the city only alleviates one immediate problem for some individual families. SCC has finite reserves of energy and resources that should be channeled into examining neighborhood-wide needs and strategically determining which organizing and development approaches are likely to have the farthest reaching effect for the greatest number of residents over the long-term. There are several opportunities for SCC to carry out comprehensive, organizing and development strategies along the Green Line extension. One of the greatest opportunities is around affordable housing preservation.

### ***Greater organizational assessments***

SCC leaders need to regularly and rigorously evaluate the organization's overall performance, including its mission, leadership and management capacity. The strategic planning process is praised by staff but needs to occur more often than every four years. One strategy is to hire a consultant who can do a yearly assessment and make sure that SCC has stayed on track with the Strategic Plan or alter the plan in response to

changes. The Board of Directors can have a greater role in both the strategic planning process and providing regular assessments of the organization.

### **Strategies for Union Square, Assembly Square, and the Green Line**

Agreeing on a shared vision for change with the City and enhancing its internal capacity will help SCC become more effective with its development and preservation activities. SCC's mission is centered on creating sustained, significant neighborhood preservation and revitalization. SCC has withstood the test of time, and is widely trusted by residents for its competency and ability to get things accomplished. For SCC to become more effective at directing change and preventing displacement, residents must be empowered through organizing around development and preservation projects. This means not only organizing around increasing inclusionary housing in Union Square but having a role in the development of City-owned properties in the Square. While focusing on jobs in Assembly Square was important, SCC should investigate development opportunities with private partners and opportunities to control inclusionary units. A focus on preservation of existing housing along the Green Line is an effective strategy based on the history, strengths, and weaknesses of SCC.

### ***Comprehensive and collaborative strategies for Union Square***

While the Green Line will affect all neighborhoods in Somerville, SCC must begin with a narrowed focus on one station area. This is necessary because SCC and its partners have limited resources and will be more effective starting small and then expanding. Union Square will not only be home to one of the Green Line stations but is currently being re-zoned to encourage higher densities and more mixed-use development. This neighborhood is one of the greatest opportunities for SCC to focus on both organizing and development.

SCC needs to concentrate its energies on not only organizing residents to identify projects that will have the greatest impact on Somerville but also on pursuing specific development projects. A recent study by Reconnecting America found that thirty one percent of the land in Union Square is underutilized, with the value of land exceeding the value of buildings, leaving the potential for redevelopment.<sup>83</sup> Several underutilized lots are owned by the city, which is cash-strapped and needs to make

---

<sup>83</sup> Reconnecting America. 2008. "Somerville Equitable Transit-Oriented Development Strategy." Unpublished report prepared for the Somerville Community Corporation.

money. SCC is not likely to be able to compete for the City owned properties without a private partner and support from organized residents. Potential partners for joint ventures include Bank of America CDC, David Aposhian, or Bart Mitchell. According to Kristin Blum, “SCC would argue to private developers that we bring value to the zoning process but it’s hard to quantify what that is beyond good community support.”<sup>84</sup> The position of a joint venture partner would give voice to the goals of the organizational aspects of SCC within specific development deals.

Zoning and land use decisions around the Green Line will have a major impact on the future of Somerville. It is critical for SCC to take a long-term view of the impacts of the land use decisions. While increased density may not be popular with all residents, it will likely mean a greater number of homes, more inclusionary units, and greater linkage fees. Instead of arguing for higher inclusionary housing requirements, SCC could work with the City to improve incentives to developers for units that cater to families and those with lower incomes.

#### ***Inclusionary housing opportunities at Assembly Square***

One important and currently unexplored opportunity for SCC are the large number of inclusionary housing units that will come on the market partly due to the Green Line extension and Assembly Square development. There are two potential roles for SCC with regard to inclusionary housing: marketing the affordable units, or owning affordable rental inclusionary units. If inclusionary units are developed off-site (which SCC usually does not agree with but still happens) these could be sold to SCC for a price where they could rent them affordably. Or in a large condominium, SCC could buy a package of units and own and rent them as affordable rentals. However, SCC could not afford to pay the inclusionary price for the units without using public subsidies to get to a level SCC could actually support with an affordable rent. Funds could be used from the Affordable Housing Trust Fund to help subsidize these units to help SCC purchase the units and maintain them as permanently affordable rentals.

#### ***Focus on affordable housing preservation interventions along the Green Line***

Addressing preservation in a concerted and coordinated manner is critical if SCC is going to stop the loss of affordable rental housing. The neighborhoods surrounding the Green Line extension provide a large stock of rental housing, which play a central role in the region’s economy. Yet the region’s rental stock is shrinking, even as housing affordability problems and demand for affordable rental units continue to grow. If this

---

<sup>84</sup> Kristin Blum, e-mail message to author, May 9, 2008.

rental stock is lost, the growing share of immigrants, recent college graduates, lower-income households, and many other households that cannot afford homeownership will be priced out of Somerville. Preserving and improving the existing stock of affordable housing in Somerville offers SCC a strategy that is both cost-effective, high impact, and encourages collaboration among the organization's departments. In addition, affordable housing preservation helps SCC's current membership base and advocates remain in their neighborhoods as values and prices rise.

In January 2008, SCC worked with the City, Tufts University, and other public and private leaders committed to preserving affordable rental housing in Somerville to develop the "Preserving Somerville" project. The partners created a proposal to the MacArthur Foundation to help fund the project but were denied. Further attention must be paid to this innovative and visionary project. SCC and its partners should create a Preservation Committee composed of governmental and non-profits key to preservation, to improve coordination and information flow to preserve at-risk properties. In addition, SCC should focus on improving several existing preservation programs including the housing rehabilitation program, condominium conversion ordinance, and organizing to preserve expiring use properties.

**A Preservation Committee** should be created to bring together public and private sector participants to identify common challenges and jointly implement solutions. The primary partners would include SCC, the City of Somerville, and Tufts University. The Council could coordinate government programs, fine tune practices and procedures, and develop new ways to support and preserve affordable rental housing. It would have the responsibility for identifying the highest-priority preservation opportunities or needs and then channeling municipal, county, and state resources to those areas. It would provide a rapid response on buildings at risk of being lost from the affordable rental stock.<sup>85</sup>

**The Housing Rehabilitation Program** offers deferred payment loans to income-eligible homeowners to assist in making needed repairs, improvements and the abatement of hazardous materials from the home. A strategy to enhance the program could include targeted use of government and Affordable Housing Trust Fund monies for longer term and deeper affordability commitments with respect to the rehabilitated rental units in exchange for the rehab financing, and possibly in exchange for freezing the property taxes on rental units.<sup>86</sup>

---

<sup>85</sup> A model for this type of collaboration is the Family Housing Fund Minneapolis.

<sup>86</sup> Fred Berman, interview by author, Cambridge, MA., 14 March 2008.

**Organizing activities around expiring-use projects** must continue with residents and public officials. SCC has a long track record of successfully keeping these units affordable by doing outreach to residents and other relevant parties, including community groups, elected officials and others with an interest in preservation. There must be long-term strategies in place to track and anticipate projects that will expire in the future. Special attention should be paid to apartment buildings and ways SCC could take ownership in order to keep them affordable if a landlord wants to sell.

**As a certified foreclosure counselor**, SCC would provide a service that is currently lacking in Somerville. In addition, the City should share data on properties with tax liens so SCC can assist those homeowners before they face foreclosure. Special attention must be paid to multi-family properties that are facing foreclosure. SCC should investigate whether money from the Affordable Housing Trust Fund could be used to help acquire the properties and then rent them to the current occupants.

### **Conclusions**

The Somerville Community Corporation has withstood the test of time and is widely respected for its successful and ambitious affordable housing and community organizing programs. With planned economic development and the Green Line extension, SCC is faced with many opportunities and hard choices. Strategies must be established, coordinated and funded to help Somerville retain a healthy socioeconomic mix. Through a strong partnership with the City and other allies, careful planning, strategic organizing activities, and resources dedicated to preservation, the suggested strategies can stem the tide of gentrification and intervene in market forces before large-scale displacement occurs. The work outlined in this chapter will not be easy. It will require SCC to emerge as a leader, negotiate with opposing forces, and attract creative sources of funding. SCC has a tradition of doing this and the City can get behind it through a shared vision.

## **CHAPTER 7: ENVISIONING THE NEW SOMERVILLE**

On a rainy Thursday night, the Green Line trolley filled with mostly young lawyers, graphic designers and MIT students, rolls past six blocks of new restaurants, bars, boutiques and galleries on Somerville Avenue. Headed to Union Square, the trolley stops in front of the new artist lofts and green condominiums. On a nearby sidewalk, a double-date of tweed-clad, white thirty-somethings leave the Independent for a latte at Starbucks.

Union Square used to be viewed as “edgy,” “diverse,” and “hip.” It was once home to small and locally-owned businesses, bars and places for live music. But as the Green Line was extended, the homes surrounding Union Square became hot commodities, pricing out the elderly homeowners, families, and musicians.

“I’ll admit that I’m somewhat responsible for this change,” says an artsy regular at Bloc 11. “I volunteered with Union Square Main Streets and participated in the first Fluff Festival back in 2007. I fought for the artist zoning overlay. However, they didn’t tell me that ‘artist housing’ was really only for the ‘creative’ rich. I lost my rental back in 2013, the year before the station opened.” Now he lives in East Somerville, the last remaining affordable neighborhood in Somerville.

The battle against gentrification and displacement lost in Union Square because of the strong handling of developers and other private interests as well as the exclusion of residents from the Union Square re-zoning process in 2008.

However, traveling along the other spur of the Green Line toward Medford provides a different view of Somerville. One that is vibrant, exciting, and diverse both ethnically and architecturally. Even at dusk on rainy weeknights, people on bikes ride alongside the train on the community path. Children walk dogs under colorful umbrellas near small businesses including Asian grocery stores and taquerias that stay open late. Spanish, Portuguese, and Mandarin can be heard from the open train windows.

Somerville Green Neighbors, an organization that formed as a result of the extensive community planning process for the Green Line is celebrating its 8<sup>th</sup> anniversary at the Somerville Community Corporation’s headquarters in Gilman Square. After sitting vacant for decades, the former Homan’s building, just feet from the Green Line station, has been transformed into affordable office space for service organizations, a Trader Joes grocery store, and affordable rental housing. The mood is festive as they reflect on their past and current needs and opportunities.

Now Board President, Danny Leblanc welcomes the 60-plus people in the room by thanking Mayor Monica Lamboy and all of the individuals and organizations that have been dedicated and committed to preserving affordable housing and quality of life issues in Somerville. “We have come a long way. The Preservation Committee has recently secured the affordability of the 500<sup>th</sup> unit to date in Somerville. We have completed construction of our twentieth limited equity cooperative within walking distance of the Lowell Station. And I am pleased to say that the last vacancy in our 100 percent affordable home-ownership project in Assembly Square was recently filled.”

Trevanna Grenfell, Director of Somerville Green Neighbors ended with a vision for the future. “As gas prices continue to reach the \$10/gallon mark, there is tremendous pressure on our communities. We see what happened in Union Square and need to remain vigilant. Combining community organizing, planning, and development strategies is key. We need to continue to form effective partnerships and are lucky to have such a strong long-time ally in City Hall.”

The conversation continued late into the night in several different languages. While the participants were proud of the affordable housing development and preservation accomplished in Somerville, they recognized that the battle was not over. There will always be market pressure and threats of displacement. However, they were joyous and confident that through collaboration, coordination, interdependence, and hope Somerville would continue to be a livable, diverse, and inclusive place.

## **APPENDIX 1: LIST OF INTERVIEWS**

*Katie Anthony, Senior Project Manager, Somerville Community Corporation*

*Fred Berman, SCC Board Member, AHOC Member*

*Kristin Blum, Housing Development Director, Somerville Community Corporation*

*Ezra Glenn, SCC Board Member*

*Kristen Harol, LIFE Initiative*

*Daniel LeBlanc, CEO, Somerville Community Corporation*

*Meridith Levy, Community Organizing Director, Somerville Community Corporation*

*Dana LeWinter, Housing Department, City of Somerville, MA*

*Madeleine Masters, Planning Director, City of Somerville, MA*

*Gus Newport, former CEO of Dudley Street Neighborhood Initiative*

*Stephanie Pollack, Conservation Law Foundation*

*Mary Regan, Community Organizer, Somerville Community Corporation*

*Ellin Reisner, Somerville Transportation Equity Partnership*

## **APPENDIX 2: BIBLIOGRAPHY**

- Bratt, Rachel. 1997. "CDC contributions outweigh contradictions: a reply to Randy Stoeker." *Journal of Urban Affairs* 19.
- Brophy, Paul and Rhonda Smith. 1997. "Mixed Income Housing: Factors for Success." *Cityscape* 3(2).
- Center for Transit Oriented Development. 2004. "Hidden in Plain Sight: Capturing the Demand for Housing Near Transit."
- Center for Transit-Oriented Development and Center for Neighborhood Technology. 2006. "The Affordability Index: A New Tool for Measuring the True Affordability of a Housing Choice." *Brookings Institution Metropolitan Policy Program Urban Markets Initiative*.
- Cervero, R., and J. Landis. 1997. "Twenty Years of the Bay Area Rapid Transit System: Land Use and Development Impacts." *Transportation Research A* 31: 309-333.
- DiPasquale, Denise and William C. Wheaton. 1994. "Housing Market Dynamics and the Future of Housing Prices." *Journal of Urban Economics* 35 (pp. 1-27).
- Freeman, Lance, and Frank Braconi. 2002. "Gentrification and Displacement." *The Urban Prospect*. Citizens Housing and Planning Council. Vol. 8, No. 1.
- Gittel, Ross and Vidal, Avis. 1998. *Community Organizing: Building Social Capital as a Development Strategy*. Thousand Oaks: Sage.
- Glaeser, E., M. Kahn and J. Rappaport. 2007. "Why Do the Poor Live in Cities? The Role of Public Transportation." *Journal of Urban Economics*, forthcoming.
- Greenberg, David Micah. "Ways of Contending: Community Organizing and Development in Neighborhood Context." (PhD diss., Massachusetts Institute of Technology, 2004)
- Handy, S. 2005. "Smart Growth and the Transportation-Land Use Connection: What Does the Research Tell Us?" *International Regional Science Review* 28: 146-167.
- Joint Center for Housing Studies. 2007. "The State of the Nation's Housing."
- Joint Center for Housing Studies. 2006. "America's Rental Housing: Homes for a Diverse Nation." Cambridge: Joint Center for Housing Studies of Harvard University.
- Kalinoski, Leah. 2001. "Smart Growth for Neighborhoods: Affordable Housing and Regional Vision." Washington, D.C.: National Neighborhood Coalition.
- Kennedy, Maureen, and Paul Leonard. 2001. "Dealing with Neighborhood Change: A Primer on Gentrification and Policy Choices." Discussion paper prepared for the Brookings Institution Center on Urban and Metropolitan Policy and PolicyLink. Washington, DC: Brookings Institution, Center on Urban and Metropolitan Policy.

Keyes, Langley C., Jr., Schwartz, Alex, Vidal, Avis, and Bratt, Rachel. 1996. "Networks and Nonprofits: Opportunities and Challenges in an Era of Federal Devolution". *Housing Policy Debate* 7 (2):201-229.

Lees, Loretta and Tom Slater and Elvin Wily. 2007. Gentrification. London: Routledge.

Levy, Diane K., Jennifer Comey, and Sandra Padilla. 2006. "Keeping the Neighborhood Affordable: A Handbook of Strategies for Gentrifying Areas." Washington, DC: The Urban Institute.

Litman, Todd. 2002. "Evaluating Transportation Equity," *World Transport Policy & Practice*, Vol. 8, No. 2, Summer 2002.

Lo, Apple. "Foreclosure Prevention Plan for the City of Somerville." (Policy Analysis Exercise, Harvard University, 2008).

NeighborWorks. 2005. "Managing Neighborhood Change: Best Practices for Communities Undergoing Gentrification."

Reconnecting America. 2008. "Somerville Equitable Transit-Oriented Development Strategy." Unpublished report prepared for the Somerville Community Corporation.

Pollack, Stephanie. 2006. "On the Right Track: Meeting Greater Boston's Transit and Land Use Challenges." Report and Recommendations of the Urban Land Institute Boston District Council.

Smith, Neil. 1996. The New Urban Frontier: Gentrification and the Revanchist City. London: Routledge.

Stoeker, Randy. 1997. "The Community Development Corporation Model of Urban Redevelopment: A Political Economy Critique and an Alternative." *Journal of Urban Affairs* (19).

Stoeker, Randy. 2002. "Community Organizing and Community Development: Apples and Oranges? Chicken and Egg?" Paper presented on COMM-ORG: The On-Line Conference on Community Organizing and Development.

Vidal, Avis C. 1996. "CDCs as Agents of Neighborhood Change: The State of the Art." In Revitalizing Urban Neighborhoods, edited by W. D. Keating, Norman Kumholz, and Philip Star. Lawrence, Kansas: University of Kansas Press.

Zellie, Carole. 1982. Beyond the Neck: The Architecture and Development of Somerville, Massachusetts. City of Somerville/Landscape Press.

### **APPENDIX 3: METHODOLOGY**

This thesis is a client report for the Somerville Community Corporation. Three different methodological approaches are employed: interviews, participant observation, and document review. Because the primary goals of this thesis are to provide strategies to SCC, all of the research methods focused on understanding the capacity of SCC based on its history, the current market in Somerville, and opportunities presented by the Green Line extension.

Interviews were conducted with key stakeholders in Somerville including SCC staff and board members, neighborhood organization leaders, City of Somerville staff, as well as community activists and advocates. These interviews provide an introduction to Somerville and helped in identifying some of the nuanced concerns and issues specific to Somerville and SCC.

The primary methodology for data collection was participatory. My engagement as an intern from September 2007 through May 2008 allowed me an insider's perspective of the organization. During my relationship with SCC, I spent nearly 10 hours per week in the office, gained the trust of staff, and participated in several of the projects described in this thesis. Time spent with SCC staff, City staff, and activists was aimed to facilitate and observe both the organizing and development processes. My work as an intern meant supporting staff and leaders' efforts to identify affordable housing development opportunities and forming strategies around the Green Line extension.

In addition to interviews, I also attended and actively participated in the City's Land Use Committee for the Green Line, SCC's Affordable Housing Organizing Committee, Somerville Transportation Equity Partnership meetings, and internal discussions at SCC. I also observed multiple public meetings and actions at SCC in order to witness the dynamics and critical moments. While this insider knowledge was helpful in writing the thesis, it was important to respect the identity of some of the people whom I spoke with and confidentiality of internal discussions.