



Ruthanne Fuller
Mayor

Barney Heath
Director of
Planning & Development

Malcolm Lucas
Housing Planner

Members

Esther Schlorholtz, Chair
Donna Rigg, Vice-Chair
Judy Korzenowski
Josephine McNeil
Tatjana Meschede
Alexandra Weiffenbach
Steve West

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CITY OF NEWTON, MASSACHUSETTS

Fair Housing Committee

MEETING AGENDA

Date: November 1, 2023

Time: 8:00 a.m.

Place: Virtual (Zoom)

Zoom Online Meeting: <https://newtonma-gov.zoom.us/j/85163632806>

The Fair Housing Committee will hold this meeting as a virtual meeting on Wednesday, November 1, 2023, at 8:00 am. No in-person meeting will take place at City Hall. To view and participate in this virtual meeting on your smartphone, download the "ZOOM Cloud Meetings" app in any app store or visit www.zoom.us. At the above date and time, click on "Join a Meeting" and enter the following:
Meeting ID: 815 6363 2806.

You may also join the meeting from your smartphone by dialing 1(301) 715-8532 and entering 85163632806# For audio only, call 1(301) 715-8532 and enter **Meeting ID: 815 6363 2806.**

To view and participate in this virtual meeting on your computer, at the above date and time, either copy the attached link into your browser or visit www.zoom.us, click "Join a Meeting" and enter the following **Meeting ID: 815 6363 2806.**

To view meeting documents, [click here](#).

- 1. Approval of September and October 2023 minutes**
- 2. Annual Training Program Updates**
- 3. Cambridge Resident Experience Study Follow-up**
- 4. Fair Housing Subcommittee Lottery Data Integration Discussion**
- 5. Affordable Homes Act Discussion**

6. Subcommittee Updates

- **Lottery Results & Lease-ups Sub-Committee**
- **Membership & Nominating Sub-Committee**
- **Fair Housing Award Sub-Committee**
- **Fair Housing Literature Sub-Committee**

7. Fair Housing Committee Priorities Discussion

FH Protected Groups

- **Promote housing choice for diverse populations to advance Affirmatively Furthering Fair Housing (AFFH), with focus on race/ethnicity, public subsidy, and disability**
- **Promote Diversity, Equity, Inclusion and Belonging in Newton**
- **Promote effective processes/practices for new affordable homeownership and resales**
- **Promote improved practices for real estate professionals to achieve more housing choice for diverse populations**
- **Identify and work to overcome barriers to successful tenancies and to improve processes/practices for tenant selection in lottery and market rate multifamily rental housing**

Learning/Teaching

- **Enhance FH literature and website information and access for the public**
- **Promote FH training for real estate professionals, landlords, tenants, the public and committee members**

Data and Analysis

- **Promote data collection on multi-family rental and new homeownership occupancy**
- **Enhance Project Review of Housing Developments to advance AFFH**
- **Support AI/Consortium Fair Housing Testing and FH testing in Newton**

Collaboration

- **Collaborate with Related Newton Commissions and Committees to increase affordable housing for households of various sizes and lower incomes and to encourage increased funding for affordable housing**
- **Promote affordable housing production in coordination with other City commissions and committees**
- **Support federal, state and city initiatives that promote AFFH**
- **Collaborate with Human Rights Commission on Fair Housing Complaint Process**
- **Contribute to Newton's FH-related plans**
- **Address committee membership appointments with representation from Human Rights Commission and legal counsel with FH specialty**

Next meeting Wednesday, December 6, 2023

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CITY OF NEWTON, MASSACHUSETTS

Fair Housing Committee

MEETING MINUTES

Date: October 4, 2023

Time: 8:00 a.m.

Place: Virtual (Zoom)

Members Present: Esther Schlorholtz, Chair

Donna Rigg, Vice Chair

Judy Korzenowski

Josephine McNeil

Tatjana Meschede

Alexandra Weiffenbach

Steve West

Members Absent:

Staff Present:

Malcolm Lucas, Housing Planner

Jini Fairley, ADA/Sec. 504 Coordinator

Lara Kritzer, Director of Housing and Community
Development

Allison McIntyre, Housing Development Planner

Public Present:

Julia Malakie, Council

Sharyn Roberts, League of Women Voters Newton

Malcolm Lucas, Housing Planner served as recorder, Esther Schlorholtz, Chair, called the meeting to order at 8:00 a.m.

To view meeting documents, [click here](#).

1. Approval of September 2023 minutes

- Due to the committee not receiving the agenda until today approving of the September minutes will be deferred until November 2023.



2. Update on Suffolk Law Discrimination Testing

- ES summarized Shaylin Davis Iannaco's written summary to the committee and stated that Newton is the lead of the WestMetro HOME Consortium which is made up of 13 surrounding communities and all of those communities are a part of the Suffolk Law University's housing discrimination testing program. There will be 130 tests conducted and each Consortium community will have 10 tests done each over a two-year period. Currently there have been 35 tests, and out of those tests seven have been found with evidence of discrimination which is 20% as of now. ES noted that this percentage is substantially less than the previous studies that have been over 50%. Six of the tests were based on income discrimination (vouchers), at 17% of the total. The last one was found to have evidence of race-based discrimination which is less than 1%.
- ES stated that there has been some improvement in the performance overall compared to the past studies commissioned by the FHC and Suffolk Law, but we have not seen the final results of the whole test. ES stated that the important thing to understand is that all the tests that found evidence of discrimination have been from large realty companies. Three out of six of the tests that found income-based discrimination were from the same large realty company. The communities that were tested and found to have evidence of discrimination are Belmont, Brookline, Newton, Waltham, Watertown and Wayland.
- ES stated that Suffolk Law will follow up with enforcement agencies like the Attorney General's office. ES then opened this discussion for questions or statements. TM wanted clarification if this study was based on rental units only and not ownership. ES stated that it was only rentals. ES also noted that the study does not include people with disabilities. TM asked who provided the funding. ES responded that the HOME Consortium used their administrative fees. She recognized the Consortium for allocating these scarce and limited funds for the study. She thanked SDI for providing the summary for the committee.

3. Annual Training for Real Estate Professionals

- ES stated that Kelly Viera, Suffolk Law, gave an excellent and well-received training on Fair Housing for real estate professionals in January 2023, and stated that she has been in touch with her and her colleague Paige Stopperich. ES stated that she is pleased that they will do another training for the FHC this upcoming January 17, 2024, at 8:30 AM. The training will be virtual and open to the public. The trainers asked for recommendations. The comments from the last training were to spend more in-depth time on what real estate professionals should do to improve. ES said that another recommendation she made is that the companies that employ real estate professionals should maintain, as a best practice, a standard Fair Housing policy that staff must acknowledge and with which they agree to comply. Along with training on the policy, monitoring, and enforcement, the companies can then better ensure that employees comply with the policy. She said that she recommended this approach before the last training, but that the trainers could not consider it at the time because HUD, which funds the training program, must approve changes to the training program to incorporate such a change. She noted that this approach can help employees to comply better with Fair Housing laws and it can help companies if they have liability issues with employees who do not comply. She said she hopes that HUD will approve this recommendation. JM recommended that the Chamber of Commerce should be reached out to be invited, she stated that they might be interested in this.

- ES stated in addition to the Real Estate Professional training that the landlord and tenant training is moving forward also. Suffolk Law staff are also interested in doing this training and there is not a fee for this as well because HUD funds them to carry out the training. ES and AW have been communicating and trying to pursue trainers, so they are both excited that it can be done by Suffolk staff. ES summarized what she discussed with Suffolk staff. 1. What is Fair Housing and who are the protected classes? 2. What is the duty to provide reasonable accommodation for a person with a disability? 3. What are examples of housing discrimination? 4. How to file a complaint and to answer questions. Committee members asked for clarification on why the training for landlords and tenants will be a joint one, which groups will be invited to co-sponsor the training, the appropriate time of the program, and who will be invited. AW said that the Newton Housing Authority has substantial numbers of landlords and tenants who should be invited to participate.

4. Village Center Zoning Overlay 3.0 update

- ES stated that this review meeting has occurred and briefly summarized what this is about. She stated that this update is intended to comply with the MBTA Communities Law. ES stated from a fair housing perspective the committee is disappointed in terms of the effects on potential affordable housing developments and feels that the proposal is watered down based on the reduction of heights and setbacks, as well as various elements. ES acknowledged the work that Planning and especially the city council members have done to try to address all the complex issues that are involved especially with all of the various community input.

5. Housing Navigator Data Collection status

- ES recapped what this was about and reminded the committee about the presentation that happened some months ago with Jenifer Gilbert, Director of the Housing Navigator. This is a non-profit organization that is affiliated with the State to effectively advertise and ensure that all rental lotteries and available units by lottery or new leasing are up to date. During that meeting they agreed to work with the City of Newton to add its Inclusionary Zoning and other affordable housing to their database. ES stated that she believes the city has already started with an initial discussion with staff at the Housing Navigator and submitted some data. ES said that Housing Navigator has agreements with several communities that have come up with similar working agreements which have improved their database and hopes that Newton will be included. AM stated that Planning has been coordinating with Housing Navigator staff and that Planning is working on making sure that complete data is given for the properties that are in Newton. ES noted that the Newton Housing Authority has already established a relationship with the Navigator.

6. Cambridge Resident Experience Study follow-up

- ES stated that some progress has been made mostly with discussions on how to proceed and asked if someone on the committee would participate and take leadership on this topic. No member responded. ES said that she will continue to work with LK to plan next steps. She referred to TM's summary of the study that was done by the Case Western Reserve and encouraged the committee to refer back to this document if needed. She stated that it would be great to have someone from the City of Cambridge to have a further discussion

with the FHC and that she was working with LK on having Chris Cotter who is their housing and community development director to see what the best avenue and best forum for people would be to learn about it. JM asked if the City Council will be involved. ES responded that Council President Albright continues to be involved and is interested in the committee's follow-up, including especially how training programs can be carried out for property managers, market-rate tenants, affordable tenants and homeowners in mixed income and affordable developments.

7. Lottery Data Collection Update

- ES made the FHC aware that TM made an update to the data collection spreadsheet and it is included in the meeting materials for reference. TM stated that the finalized spreadsheet is not significantly different from the last one that was used and that they have actually tested and collected from management companies. She said that the subcommittee has received good responses and it collected great data that they could share with the City and the full membership of the FHC.
- TM stated that the subcommittee thought about collecting data from more recent developments and has had conversations with the City about this data request that the subcommittee is proposing. The subcommittee's data includes race, disability, and public subsidy (voucher status) that are protected by fair housing. The subcommittee would like to encourage the City to look at the data sheet and reach out if there are any concerns and questions about what the subcommittee is proposing to do. ES said that the City already has pending lottery data requests with these developers/owners and hopes that there will be further discussion at the FHC about how to integrate the Fair Housing data request from the subcommittee into the City's existing data request. She said that it is valuable to collect this data to help identify barriers to successful occupancy through the lottery process for protected classes. She said the data so far shows that there is a disproportionate negative impact by race, disability, and public subsidy.

8. Subcommittee Updates

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9. Fair Housing Committee Priorities Discussion

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CITY OF NEWTON, MASSACHUSETTS

Fair Housing Committee

MEETING MINUTES

Date: September 6, 2023

Time: 8:00 a.m.

Place: Virtual (Zoom)

Members Present: Esther Schlorholtz, Chair

Donna Rigg, Vice Chair

Josephine McNeil

Alexandra Weiffenbach

Judy Korzenowski

Tatjana Meschede

Members Absent: Steve West

Staff Present:

Malcolm Lucas, Housing Planner

Jini Fairley, ADA/Sec. 504 Coordinator

Lara Kritzer, Director of Housing and Community
Development

Shaylyn Davis, Housing Program Manager

Allison McIntyre, Housing Development Planner

Public Present:

Alicia Bowman, Council

Brian Engler, Principal, SEB Housing

Sharyn Roberts, League of Women Voters Newton

Malcolm Lucas, Housing Planner served as recorder, Esther Schlorholtz, Chair, called the meeting to order at 8:00 a.m.

1. Approval of August 2023 minutes

- Upon a motion by DR, TM seconded the motion. The August 2023 minutes were approved 6-0-0.



2. Review of City Oversight of Affordable Housing Marketing, Lottery, and Leasing/Sales

- Shaylyn Davis-Iannaco, Housing Program Manager, introduced herself and shared a chart that showed the ten-step process for City and State review of affordable housing marketing plans and lotteries. She informed the FHC about changes that need to be made in the timeline of the development process that were previously given by housing staff. She stated, after having conversation with the Planning and Development team, that the initial estimate that the review process was close to four to six months is actually around six to nine months before marketing. The developers submit the final packet draft to the Certified Executive Office of Housing and Livable Communities (EOHLC) agent and Newton City staff for review. This packet has the Affirmative Marketing Plan, Resident Selection Plan and lottery information. Housing staff reviews and works with the developer to make the necessary changes to be in compliance with EOHLC. Once finalized the packet gets sent to EOHLC for their approval. Once approved the developer hires a certified lottery agent that preps the necessary application materials and documentation requirements for people to apply for the new units that are available. These documents are sent to housing staff to post on the city's website and to get the word out to several avenues the City uses to help promote affordable housing in Newton. The lottery agent oversees the application process and the lottery for the leasing agency for the development. The leasing agent screens the lottery winners based on their management policies and procedures.
- ES asked what type of projects go through this process. She stated that this process seems to only fit 40B and the Special Permit projects that require State approval. SDI stated that most of these projects currently go through the State process and those units are added to the Subsidized Housing Inventory (SHI) list. SDI stated most IZ projects will have a special permit to clarify more to ES. SDI stated that she has not experienced an IZ unit that has not gone through this process with the state.
- Councilor Bowman stated if the village zoning passes there will be many more units by-right that will go through the City review process. ES asked that City staff clarify what review role EOHLC will have when affordable units will be built in IZ units that are by-right and do not require special permits that then kick-in a state review. JM asked if the housing staff monitor where the marketing ads will be placed. SDI stated that there is not a requirement. JM stated that she thinks this should be part of the development review step. TM asked about lottery and unit turnover data and can it be shared with the FHC when housing staff receives it. SDI stated that could be a possibility and she will look into it.
- ES summarized questions raised by the Lottery and Lease-up subcommittee on the Bristol Waban Condominium lottery application materials. She said that the specific language in the application that raised concerns included the statement that applicants will not be informed when they have an incomplete application. The sub-committee strongly felt that applicants should have the right to know deficiencies so that they have the opportunity to submit completed applications and participate in the lottery. ES stated that the City's policy on handling incomplete applications is not clear overall and asked that planning staff follow up to get more clarification and consider having the language changed to allow notification to lottery applicants of deficiencies. SDI stated that she will investigate this. ES also said that subcommittee members had concerns related to some of the language used in the application materials regarding sexual orientation and people with disabilities.

- ES summarized additional recommendations for improving the review process. She said that it is important for the City to more completely review the final lottery application materials to ensure that they comply with the quality standards of other state-approved documents. She asked that FHC members be added to the lottery notification list that ML maintains so that they can get information about the lotteries. She recommended that the City's ADA/504 coordinator be involved in the earlier stages of project review that the Planning Department carries out to ensure that the accessible, and affordable and accessible affordable units are thoroughly reviewed early enough to inform the developers of the City's concerns with placement, size, etc. She said that this should occur significantly before the building permit application is submitted.
- JM recommended that the city staff should inform themselves with HUD's lottery lease up data on algorithms because there is new information. She said that some language issues and policies are discriminatory in this area and need to be paid attention to. She said she will forward the link to the information.

3. Recommendation for Enhancing Newton's Oversight of Deed Restricted and City-supported Affordable Housing

- ES has been working on this recommendation to identify the gaps that have been identified by various groups. ES stated that the city is building new inclusionary zoning units that do not have a state review component. The smaller developments have less experienced developers than the ones who do larger developments, so the committee would like to recommend that a solution similar to that for the bigger development is available for the smaller ones. A former committee member, David Hedison, managed a mechanism for smaller projects in his work at Chelmsford Housing Authority. This mechanism helped with compliance and this document and idea was submitted to the committee for review. ES made some edits to this mechanism to fit Newton and she has also spoken with Brian Engler, SEB, about how some municipalities manage developments. ES asked the committee if there are any comments on this proposal before Brian Engler logs on for his presentation and stated that the first step is to present this mechanism to Barney Heath, Planning and Development Director, for his consideration of implementation and have further discussions through this method.
- Brian Engler, SEB introduced himself and thanked the FHC for giving him the opportunity to come out and speak. He stated that municipalities should recognize that they have leverage over developers and management companies in ensuring that the necessary certification and recertifications work on an ongoing basis for any projects that are built under a special permit or under the LIP program with DHCD in 40Bs. This leverage/language is in the regulatory agreements stating that municipalities have the authority and should collect annual reports from developers or their property management companies. He stated that his company always encouraged towns or cities to have oversight of affordable housing programs because they ensure that developers/owners/property managers of properties are implementing the program accurately both in the initial phases and over time. He stated that this is a lot of work and administration for the City to oversee. He stated that in his experience property management could overlook this type of management due to turnover and lack of experience because it is not easy work.
- BE talked about how some municipalities hire organizations like them or RHSO that create databases, tracking systems and anything else that is required but there is a fee that is

associated with the work of these organizations. This proposal will help ensure that the work is being completed and it will hold property owners/managers accountable. BE suggested a method the City could use to ensure better compliance which would include sending annual requests for data to each owner/management agent to provide the required data on each of the affordable housing units, including income certifications and other required reporting. He said if they do not report on each of the units or provide inaccurate information, this will help the City to identify problems where they need to intervene.

- JM asked how developers are likely to react to paying fees or hiring consultants to cover the oversight costs. BE said that he does not believe the annual per unit fees will be of major concern and noted that developers/owners are already obligated to carry out the functions, so they may appreciate having an option to carry out the required work by a certified entity or entities.

4. Subcommittee Updates

- **Lottery Results & Lease-ups Sub-Committee**

- TM stated that the subcommittee is in the process of defining the data elements and she was happy to hear Brian Engler's presentation because it gave the committee more ideas to think about and once they incorporate these ideas and test the updated tracking sheets with the most recent development that are in Newton.

- **Membership & Nominating Sub-Committee**

- DR stated that Nancy Kritzman is interested in joining the Fair Housing Committee and that she is coordinating with ML to show her how to apply. DR then asked if the committee had any suggestions to let her know.

- **Fair Housing Award Sub-Committee**

- **Fair Housing Literature Sub-Committee**

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**RESIDENT EXPERIENCES
OF INCLUSION AND BIAS
IN INCLUSIONARY HOUSING
IN CAMBRIDGE**

DECEMBER 2022

Newton Fair Housing
Committee
Discussion
November 1, 2023



JACK, JOSEPH AND MORTON MANDEL
SCHOOL OF APPLIED SOCIAL SCIENCES
CASE WESTERN RESERVE
UNIVERSITY

National Initiative on
Mixed-Income Communities

CONTEXT

- Strategy of requiring developers of private, market-rate housing to include a certain percentage of units affordable to low- and moderate-income households has gathered momentum since the early 2000s,
 - fueled by a booming housing market with escalating prices,
 - a shrinking supply of affordable rental units and houses, and
 - growing awareness of the damages caused by racial and economic segregation.
- Research highlights “incorporated exclusion” which describes mixed-income and inclusionary housing in which residents of lower-incomes have been physically incorporated but experience
 - exclusion with different standards of treatment,
 - different levels of voice and influence, and
 - an overall limited sense of belonging (Chaskin and Joseph, 2015).
- This study focuses on the City of Cambridge which has one of the oldest and most robust Inclusionary Housing Programs in the country.

STUDY

This study explored 430 Cambridge residents' perceptions and experiences in their buildings and housing complexes, including their

- sense of community belonging,
- interactions with neighbors,
- their experiences with bias,

and for Inclusionary Housing program (IHP) participants,

- their experiences with the IHP program.

Information was also collected about study participants' recent housing history, physical and mental health, ties to Cambridge, and demographic characteristics

SURVEY RESPONDENTS

Of the 430 survey participants

- 300 (70%) resided in affordable units in mixed income housing,
- 66 (15%) resided in market rate units in mixed income housing,
- 64 (15%) resided in all affordable housing

Table 1B: Type of Housing , Renter/Owner Status, and Number of Buildings or Complexes*

| Type of Housing Unit | Housing Tenure | Number Surveyed | Number of different building or complexes |
|---|-----------------------|-----------------|---|
| Affordable units in IHP buildings or complexes | Renter | 258 | 42 |
| | Owner | 42 | 19 |
| | Subgroup Total | 300 | 61 |
| Market-rate units in IHP buildings or complexes | Renter | 42 | 13 |
| | Owner | 24 | 10 |
| | Subgroup Total | 66 | 23 |
| Affordable units in all-affordable buildings or complexes | Renter | 57 | 16 |
| | Owner | 7 | 4 |
| | Subgroup Total | 64 | 20 |
| Total | | 430 | 104 |

*Note: There were survey respondents from the affordable IHP units and market-rate units that lived in the same building. Between renters from the affordable IHP and market-rate units, there were 44 different buildings or complexes. Between owners from the affordable IHP and market-rate units, there were 20 different buildings or complexes.

COMMUNITY BELONGING, CONNECTEDNESS, AND COMMUNICATION

- Cambridge residents in IHP units generally like living in their neighborhoods and complexes.
- Renters of affordable IHP units, on average, had a significantly lower sense of community than owners of affordable IHP units and those in all-affordable developments.
- Renters and owners of affordable IHP units both feel a sense of belonging, but owners have stronger connections to the community than renters do.
- IHP participants had generally positive experiences with the IHP program and staff. One-third of renters in affordable IHP units found the process of applying to Cambridge IHP somewhat or very confusing and stressful.

EXPERIENCES AND PERCEPTIONS OF BIAS AMONG RESIDENTS LIVING IN AFFORDABLE IHP UNITS

- 40% of all renters and 41% of all owners of affordable IHP units reported encountering bias or discrimination at least several times in the past year (about 10% in each group experienced bias “less than once a year”).

For residents of affordable IHP units, the likelihood of experiencing bias differed by race, gender, income level, and whether the household includes children

- Race was seen as the primary cause of bias.
- Being an IHP participant and/or having a low-income level were seen as triggers for bias.
- Having a household with children increased the perception of experiencing bias.
- Being female increased the likelihood of renters in affordable units experiencing bias.
- Perceptions of bias on the basis of disability
 - White renters of affordable IHP units were more likely to attribute bias to their disability,
- Perceptions of bias on the basis of language
 - Asians in affordable IHP units were more likely to attribute bias to the fact that English is not their primary language.

EXPERIENCES AND PERCEPTIONS OF BIAS AMONG COMPARISON GROUPS

- Residents in affordable IHP units and residents in all affordable developments in Cambridge experienced more bias than residents of market-rate units.
- Race, Hispanic or Latino identity, gender, having children, low-income, and health status were significant predictors of bias for some categories of residents.
 - Black residents were more likely than Asian or Whites to experience bias if they were owners of affordable IHP units or renters of market-rate units.
 - Hispanic renters experienced more bias than non-Hispanic renters in all-affordable developments.
 - Female residents were more likely than males to experience bias if they were renters or owners of affordable IHP units or renters of market-rate units.
 - Respondents in fair or poor health were more likely to experience bias if they were renters or owners of affordable IHP units or owners of market-rate units.

SOURCES OF BIAS

- A large proportion identified property management or residents of market rate units as the source of bias
 - Almost 60% of incidents reported by renters and 22% reported by owners in affordable IHP units identified property management as the source of bias.
 - Incidents of bias against residents of affordable IHP units that involved other residents in their building/complex most frequently identified residents living in market-rate units as the source of bias (72% of incidents for renters and 53% for owners).

IMPLICATIONS AND RECOMMENDATIONS

- STRENGTHEN RELATIONSHIPS

- (1) between CDD and residents, property owners, management companies, and local service providers;
- (2) between residents in affordable and market-rate units; and
- (3) between residents in affordable IHP units across IHP buildings and housing complexes

EXPAND COMMUNICATION

1. Increase communication and engagement with IHP participants
 - a) Develop mechanisms for residents to report problems and concerns, report bias incidents, provide feedback, and make suggestions regarding their housing and buildings.
 - b) Create a schedule and methods for regular communication with residents.
 - c) Provide residents with information and connections to community services, resources, and events.
 - d) Conduct routine social climate surveys of IHP households. Other mixed-income communities, for example, use annual online surveys as a cost-effective way to stay informed of residents' experiences in the community.

EXPAND COMMUNICATION

2. Create transparency and accessibility around IHP practices and policies
 - a) Communicate with residents about program practices more frequently, and increase opportunities for residents to provide input on IHP practices.
 - b) Clarify the practices around changes in a tenant's income over time as it relates to IHP participants' eligibility to remain in their units when income increases.
 - c) Communicate with residents about the process that property managers use to upgrade units, and what to do when there are health and safety concerns in a unit or building (e.g. Inspectional Services Department).

EXPAND COMMUNICATION

3. Increase awareness among property owners, property management staff, and residents of affordable and market-rate units about the goals and collective benefits of the IHP.
4. Share and discuss the study findings with residents of IHP buildings, property owners, property management and other site staff, as well as community organizations and service providers, and residents of the larger Cambridge community.

PRIORITIZE RACIAL EQUITY AND INCLUSION

- A key implication of the study is that building IHP units is not enough to create inclusive communities.
- Just building the units and nothing else to achieve the goals of Inclusionary Housing Programs can exacerbate isolation, divisions, stigma, and differences among residents, leading to living environments where residents in affordable IHP units especially may feel unwelcome, excluded, and experience bias in the buildings they are meant to call home.

RECOMMENDATIONS

1. Create a task force with representation from renters, owners, property managers, and City staff.
2. Provide information and resources for assessing and addressing bias in inclusionary housing or mixed income settings.
3. Offer and encourage participation in trainings on inclusion and racial equity and inclusive property operating practices for IHP property owners, property managers and other staff, and residents of IHP buildings.

RECOMMENDATIONS

4. Engage local, regional, and state entities and non-profit agencies (e.g., **fair housing coalition**, Massachusetts Commission Against Discrimination, Greater Boston Legal Services) to discuss the study findings on bias and develop action steps to address bias in IHP communities.
5. Provide guidance for residents and IHP property managers on appropriate avenues for intervention and accountability actions related to residents' concerns with bias and exclusion.
6. Encourage property managers to create intentionally welcoming and maximally accessible environments for people of color, women and non-binary people, individuals with disabilities or health problems, and those with children—for residents and visitors alike— in IHP buildings.

How to Complete the 40B Compliance Worksheet

Owner Agent

Enter the following data on the Owner Agent Tab

Year
Date
Development Name
Contact Person
Telephone #
Management Agent
Method of Certification

Unit #
Resident Name (Last, First)
Vacant = V (Not Collecting Rent)
Number in household
Unit size 1,2,3,4
Market Type (specify % of AMI)
Move-In Date
Total Income @ Move-In Certification
Date of Last Income Certification
Assets @ Last Certification
Total Income @ Last Certification
Rent as of 12/31/2019
Voucher Holder Y/N

Agent Owner
Signature
Title

After entering all the data and signing the document, please email/mail it to the listed MassHousing €

Compliance Year [Do not Change this date]

Date that this form is signed

Select your Development

Development Contact Person

Contact Persons phone number

Management Company

Select Certification Method

Unit Number/Door Address

Resident Name - **If Vacant Leave Blank**

If Vacant enter **Vacant**; else leave blank

Number of persons in Household

Unit Size / Number of Bedrooms

Enter Agent Owner Name

Sign/Attach Digital Signature

Enter Title

email / address.

NEWTON FAIR HOUSING LOTTERY UNITS LEA

NAME OF PROPERTY:

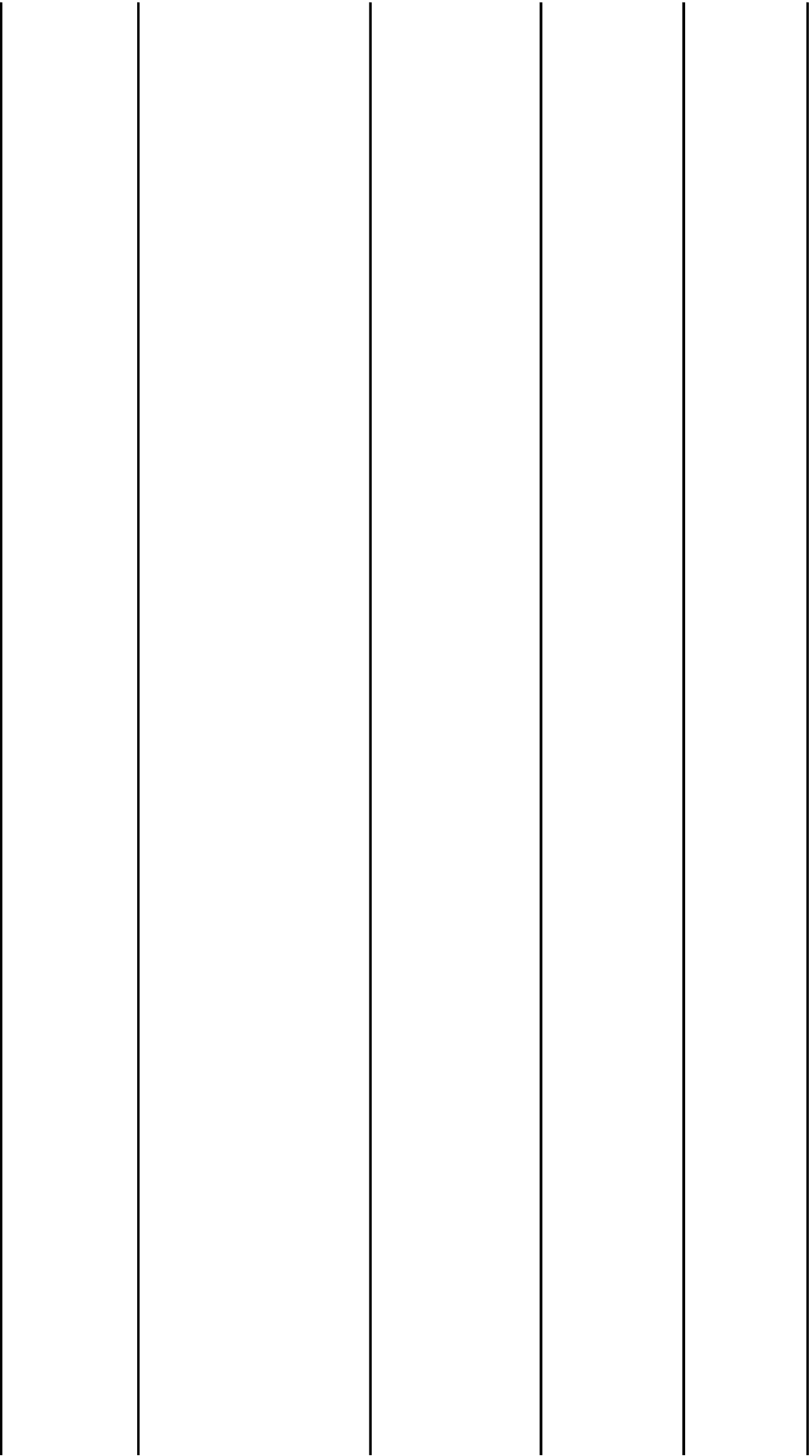
NAME OF CONTACT PERSON:

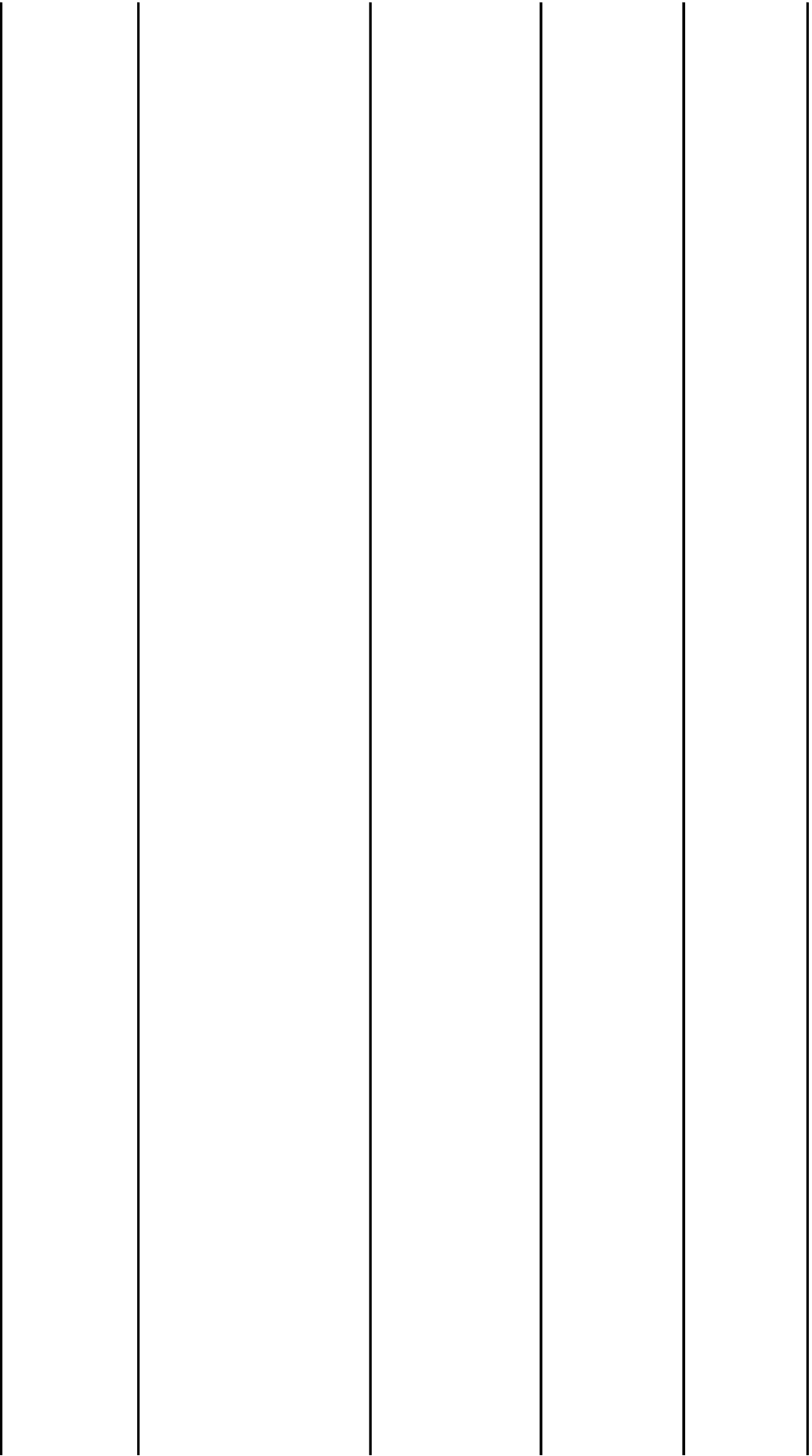
AFFILIATION OF CONTACT PERSON

DATE:

Please use the drop down lists that appear to the right when you click on a cell.

| Application # | Size of unit | Number in household | | Market Type (specify % of AMI) | Local Preference? | Lease Type? |
|---------------|--------------|---------------------|------------|--------------------------------------|----------------------|----------------|
| | # bedrooms | # adults | # children | | | |
| | | | | | | |





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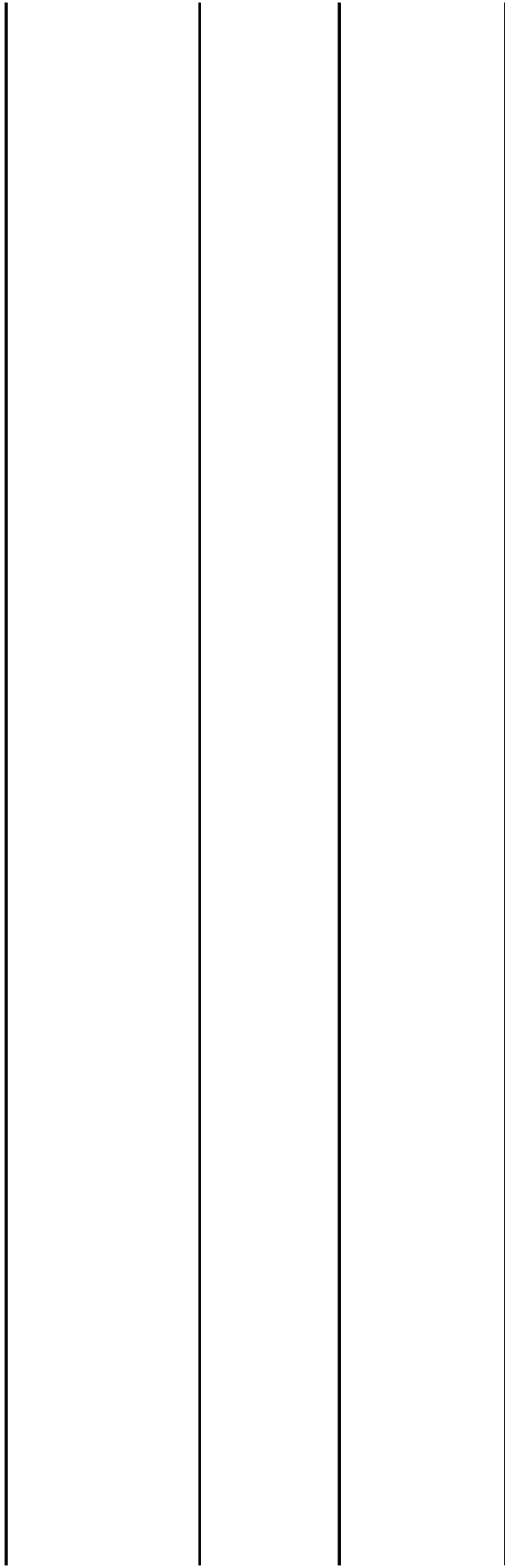
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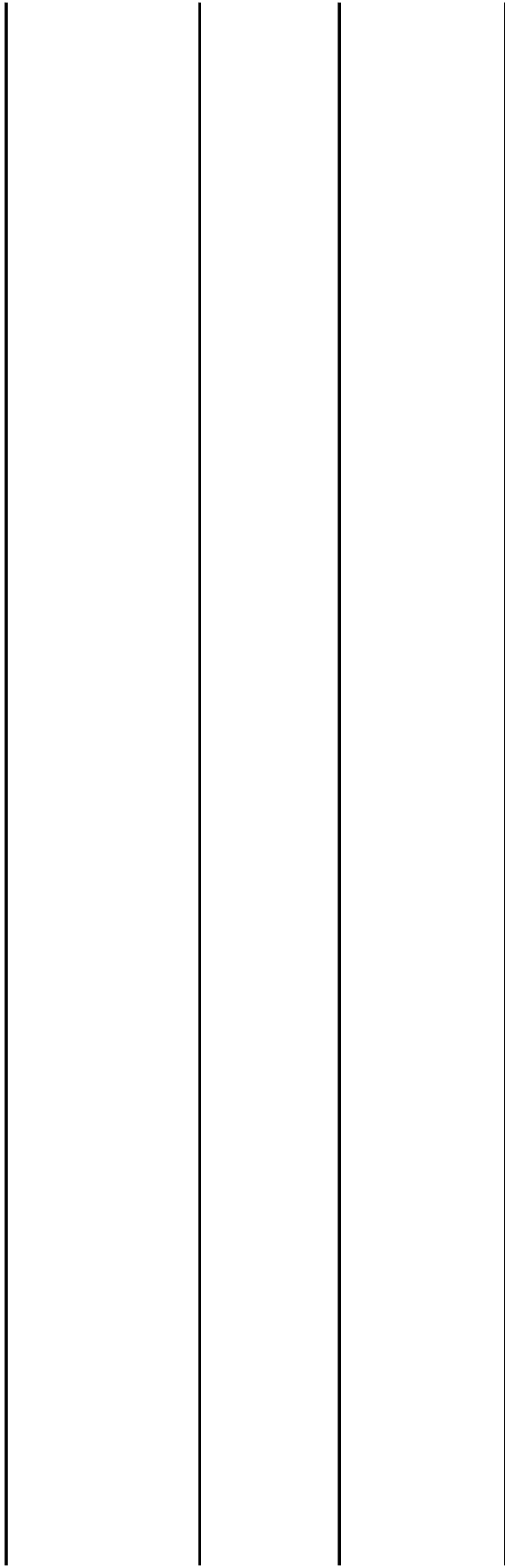
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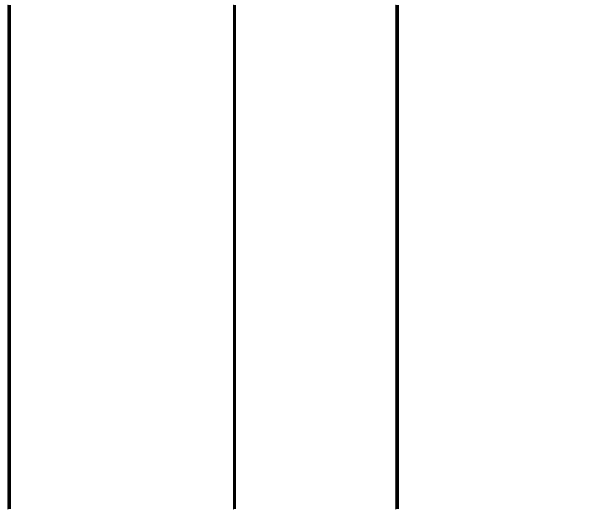
|

HOUSE DATA REQUEST

| Race(s)/Ethnicity(ies) of household members, if disclosed | Anyone with a disability in the hh, if disclosed? | Voucher Holder? | Offered a unit Yes or No | |
|--|--|------------------------|---------------------------------|----------------|
| | | | | Primary Reason |
| | | | | |







| | |
|------------------------|-------------------------------|
| If no, why not? | Did applicant move in? |
|------------------------|-------------------------------|

| | | |
|-----------------------|------------------|-----------------------|
| If other, pls explain | Secondary Reason | If other, pls explain |
|-----------------------|------------------|-----------------------|

| | | |
|--|--|--|
| | | |
|--|--|--|

Vertical line

If not, what was the reason given?

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| Offered a unit Yes or No | If no, why not? | | Did applicant purchase the unit? | If not, what was the reason given? |
|-----------------------------|--|--|--|------------------------------------|
| | Primary Reason If other, pls explain | Secondary Reason If other, pls explain | | |
| | | | | |







