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Barney S. Heath
Director

Newton Housing Partnership (NHP)

September 24, 2024 from 5:00 pm - 7:00 pm

Virtual meeting: <https://newtonma-gov.zoom.us/j/85918529886>

Meeting ID: 859 1852 9886

1. Review and Approval of July minutes, 2024 Meeting Summary

2. Newton Thrive

- a. Presentation from EMPATH team

3. Inclusionary Zoning Ordinance Review

- a. Presentation from Planning Staff
- b. Conversation with RKG Associates

4. Strategic Planning Session

- a. Member discussion about in person planning session (November)

5. Project Updates

- a. Northland (Needham St.)
- b. Riverside
- c. West Newton Family Navigation Center (FamilyAid Project)

6. Upcoming Meetings

- a. Next Meeting: October 22, 2024
 - i. Resident services
 - ii. Mitigation fees
 - iii. IZ compliance reporting
 - iv. Priorities Group presentation
 - v. Presentation on Riverside changes (potential)
 - vi. Presentation on Northland Needham changes (potential)

Attachments:

- July meeting minutes
- EMPATH's Thrive report
- RKG inclusionary zoning ordinance scope
- Inclusionary zoning ordinance presentation
- Project update worksheet

Meeting Access Instructions

No in-person meeting will take place at City Hall.

The Newton Housing Partnership will hold this meeting virtually on September 24, 2024 at 5:00 pm.

Access the meeting audio and video on your smartphone:

- 1) Open your smartphone's app store. If the Zoom app is already installed on your smartphone, this step is not necessary.
- 2) Download the "ZOOM Cloud Meetings" app.
- 3) At the above date and time, open the ZOOM Cloud Meetings app, and tap, "Join a Meeting."
- 4) Type the following Meeting ID into the dialogue box: 859 1852 9886

It is also possible to open your smartphone's internet browser app, navigate to www.zoom.us, and join the meeting with the same Meeting ID: 859 1852 9886. Doing so would provide access to the meeting's audio and video.

OR

Access the meeting audio only on your phone or smartphone:

- 1) Dial + 1 312 626 6799
- 2) Dial the following Meeting ID: 859 1852 9886

OR

Access the meeting audio and video on your computer:

- 1) Open your internet browser on your computer
- 2) At the above date and time, copy the following link into your browser's URL bar:
- 3) <https://newtonma-gov.zoom.us/j/85918529886>
- 4) Type the following Meeting ID into the dialogue box: 859 1852 9886

The location of this meeting/event is wheelchair accessible and Reasonable Accommodations will be provided to persons with disabilities who require assistance. If you need a Reasonable Accommodation, please contact the city of Newton's ADA/Section 504 Coordinator, Jini Fairley, at least two business days in advance (2 weeks for ASL or CART) of the meeting/event: jfairley@newtonma.gov or (617) 796-1253. The city's TTY/TDD direct line is: 617-796-1089. For the Telecommunications Relay Service (TRS), please dial 711.

Newton Housing Partnership

DRAFT Notes from July 23, 2024 Meeting Zoom Meeting 5:00pm-7:00pm

D Rockwell
7/23/24

Partnership Members in Attendance:

- David Rockwell, Lizbeth Heyer, Ann Houston, Bryan Decker, Nicole Stewart, Mark Caggiano, Albert Simmons

Others in Attendance:

- City of Newton Staff: Lara Kritzer, Allison McIntyre
- City Councilors: Julia Malakie, Rena Getz
- Former NHP members: Josephine McNeil, Charles Eisenberg
- Members of the community

NOTE: Because of health matters, Chair Marva Serotkin could not attend and, the day before the meeting, asked David Rockwell to chair in her absence, and asked Shaylyn Davis-Iannaco to handle notetaking. Shortly before the meeting, Shaylyn's daughter became ill, keeping her from attending, and Lara Kritzer handled the staff responsibilities for the meeting in Shaylyn's place.

Decisions taken, and follow-up items assigned, are shown in bold.

1. Minutes of the June 25, 2024 Meeting

Approved by a vote of 5-0 with two abstentions (Marc and Albert, who were not present at the June meeting) (Bryan motion, Nicole second).

2. Priorities Group Update

Ann and David indicated that work by the Housing Priorities Task Force continues but there is nothing to report tonight.

3. Mitigation Fees Update

David indicated that, with a lot of hard work by Shaylyn in the last month, the mitigation fees chart is nearing completion. He screen-shared the chart, which contains the dollar amounts of fees of various kinds charged by the City, broken into two groups – fees mandated by City ordinances, and fees charged at the discretion of a project's permitting authority. In the first group are Infiltration & Inflow ("I&I") fees calculated by the Engineering Department, building permit fees, tree ordinance fees, comprehensive permit fees and special permit fees. In the second group is a range of on-site and off-site improvements charged to the developer as part of the permitting process. There remains some more work on some missing items, and it should be ready for a full report at the September 24 meeting.

4. Partnership Discussion on Inclusionary Zoning Ordinance

- a. Summary of Key Provisions. In Shaylyn's, Lara presented staff's "Key Provisions of Newton's Inclusionary Zoning Ordinance", a 7-page summary. The presentation included questions and comments from Partnership members, which David recorded for future use by the Partnership in its upcoming evaluation of the IZ Ordinance in parallel with the formal evaluation soon to be undertaken by RKG Associates under a contract soon to be executed, with a start date in mid- August and a completion deadline of 6 months. The questions and issues raised are listed on Appendix 1 to these minutes. Lizbeth urged that the Partnership have the opportunity to weigh in on the scope of the RKG Associates contract, and **Lara agreed to distribute the contract in its current form to the Partnership members**, which will allow Partnership members to offer comments on the scope to Planning. **David asked that any such comments be addressed in writing to Lara, with a copy to Marva, so that the Partnership can keep track of the comments its members are forwarding to Planning.**
- b. Resident Services Discussion. David noted that in his opinion, this agenda item should stand alone rather than under the IZ Ordinance review, as it is not yet clear in his mind that resident services should be included in the IZ ordinance. He said that this item is on the agenda tonight as a signal for research on the subject to be taking place. This will be on the September agenda.

5. Project Updates

David explained the purpose of the new "Project Update Chart" which will allow staff to easily insert updates when they occur and retain the basic static information about each project for reference by Partnership members. The existing version, he said, needs a little work with font size to make it easier to read. Lara said the staff is pleased with this chart as a timesaver for staff.

Updates

- a. **78 Crafts St** -- Public hearing on July 16 showed continuing levels of support and opposition from the community; the big changes are the developer's (1) incorporation of an active use at ground level of Building A for a more human-oriented presentation to Crafts Street, well received by the peer review designer; (2) accomplishment of a stormwater management design that meets the City's 2" stormwater absorption requirement, and (3) schedule of \$2.1M in offsite improvements for traffic mitigation. No August public hearing; next hearing will be Sept 10; the state-driven deadline is Oct 10.
- b. **528 Boylston St** -- under litigation (abutter lawsuit)
- c. **41 Washington St** -- Lara reported that the ZBA process is coming near its close, but that there is no agreement between the ZBA and the developer on the basic development program
- d. **West Newton Armory** -- David repeated the news from last Partnership meeting that the developer has been approved for a tax-exempt bond closing by the end of calendar 2024, meaning that construction will begin in the spring of 2025.
- e. **West Newton Family Navigation Center (Family Aid project)**. Lara reported that closing is moving forward and occupancy could occur within 6 months.
- f. **136 Hancock St and 169 Grove St (City Project)**. David repeated the update that the Real Property Re-Use committee is overseeing the creation of a Joint Advisory Planning Group (JAPG), consisting of nine residents (5 appointed by the City Council Chair, four by the Mayor). That process is continuing.

- g. **144 Hancock Street (Civico Project).** David noted that the process of review of the revised plans for compliance with Inclusionary Zoning is ongoing.
- h. **Newton Thrive.** Lara reported that the sponsor will be coming to the September meeting to makes its Year-1 Annual Report.

6. Upcoming Meetings

- a. August 27, 2024 meeting – **Canceled.**
- b. **Next meeting – September 24 – Planning discussion for NHP**

Meeting concluded at 6:20pm.

Respectfully Submitted,

David Rockwell
7/23/24

See Appendix 1 on next page.

Appendix 1
List of Questions and Issues Raised about Newton’s IZ Ordinance
by NHP Members and Attendees
During Meeting of July 23, 2024

1. *(David)* – Is Tier 2 (110% AMI) a choice or a mandate for 21-99-unit projects (2.5% of total) and for 100+-unit projects (5% of total)? What have we learned about what degree of affordability is incentivized by the presence of Tier 2 units in the ordinance? (Sect. 5.11.4)
2. *(Josephine and Mark)*: Does the language in Section 5.11.4.D adequately address the recent trend in the market for tenants to pay their own water bills with separate metering?
3. *(Mark)*; We should revisit the meaning of “unusual net benefit” as it applies as a rationale for cash payment in lieu of onsite units; specifically, should a large amount of cash be a sufficient “unusual net benefit”? (Sect. 5.11.5.A.2)
4. *(Josephine and Lizbeth)*: Should we revisit the cash payment rules for senior housing developments, in regard to
 - a. How the required services in a senior housing development are quantified (given that the ordinance requires that the services for low-income residents are to be at a level that replicates those provided to the market residents)?
 - b. Whether the services portion of the proceeds of the in-lieu payment can or should be targeted to services at other affordable housing developments, and, if so, to other senior affordable housing developments.
5. *(Mark and David)*: Clarify whether the physical comparability standard applies to finishes’ and appliances. (Sect. 5.11.7.)
6. *(David and Charles)*: Are we satisfied that the square footage ratios between the affordable-unit square footage and the total project square footage are serving the correct purposes. Specifically,
 - a. (Section 5.11.7.C.2.b) – the average SF of the affordable units must be no less than 80% of the average square footage of the market-rate units of the same bedroom count
 - b. (Section 5.11.7.C.3) – the total square footage of the affordable units must not be less than 10% of the project’s total square footage.

Newton Thrive

Year 1 Evaluation Report

Year 1 Evaluation

July 2024

UMassAmherst

Donahue Institute
Applied Research and
Program Evaluation

Newton Thrive

Year 1 Evaluation Report

Newton Thrive Project Team

City of Newton

Barney Heath, Director of Planning & Development
Lara Kritzer, Director of Housing & Community Development
Linda Walsh, Commissioner of Health & Human Services

Economic Mobility Pathways

Ashley Winning, Vice President of Research and Evaluation
Gamuchirai Madzima, Director of Economic Mobility Services - Newton Thrive
Michelle Blundell, Senior Director of Communications

UMass Donahue Institute

Christina Citino, Senior Research Manager

Established in 1971, the UMass Donahue Institute is a public service and engagement arm of the University of Massachusetts. Our mission is to advance equity and social justice, foster healthy communities, and support inclusive economies that alleviate poverty and promote opportunity. In collaboration with partner organizations and clients, we carry out our mission through research, education and training, capacity building, and direct services to strengthen our collective impact.

The Institute's Applied Research and Program Evaluation group partners with organizations across multiple sectors to design and implement utilization-focused studies that address the social determinants of health. We believe that research is most meaningful when findings can be applied to public benefit. We also believe that evaluative work is a key driver in advancing equity and strive to utilize culturally responsive and inclusive evaluation practices in all our work.

For more information, www.donahue.umass.edu.

Contents

Introduction 1

About This Report 3

Year 1 Goals: Progress and Accomplishments..... 4

Newton Thrive Program Implementation and Early Results 8

Year 2 Implementation 16

Introduction

In February 2023, Mayor Fuller announced the selection of Economic Mobility Pathways (EMPath) to implement the City's **Economic Mobility Initiative**. EMPath was awarded \$1,583,568 to implement **Newton Thrive**, a program designed by EMPath in partnership with the City of Newton to support low-income residents of Newton who were impacted negatively by the COVID-19 pandemic.

The EMPath contract covers the period April 1, 2023 through March 31, 2026. This timeline includes a four-month start-up period and two full years of service for all participants enrolled by March 31, 2024.

City chooses EMPath to provide economic stability and mobility support to 50 low-income families



EMPath
Economic Mobility Pathways



Why Economic Mobility?

Economic mobility moves people beyond simply meeting basic needs to changing their economic well-being over time.

In developing this initiative, the City of Newton purposefully chose to invest in an economic mobility initiative, with the aim of helping low-income Newton families making lasting positive change by breaking the cycle of “just getting by.”

Economic mobility is generally understood in terms of increased earnings. However, for low-income families, additional tangible measures of economic mobility may include other foundational changes such as debt reduction, asset building, education and training, stable employment, livable wages, stable and affordable housing, reliable transportation, and stable and quality childcare. Furthermore, realizing economic mobility may have intangible effects on low-income individuals, including increased self-worth, greater sense of power and autonomy, access to opportunity, social inclusion, or feeling valued in the community.

Why Mobility Mentoring?

EMPath’s economic mobility coaching approach, called Mobility Mentoring®, was developed in acknowledgement that it is a stressful and complex journey out of poverty, and no journey is the same.

EMPath recognizes that long-term solutions are necessary to help families move beyond just meeting their basic needs to truly thriving. Families desire individualized support on how to move themselves forward. Mobility Mentoring provides that support by helping to set goals, strategizing around how to achieve them, and tackling roadblocks. The model helps participants deal with all the stresses that come along with trying to get out of poverty and provides them with the support they need to persevere in the journey. The model is holistic, individualized, trauma-informed, and culturally competent.

Mobility Mentoring seeks to help people with low incomes acquire the problem-solving and goal-setting skills necessary to navigate the complex pathways out of poverty and become economically mobile.

EMPath rigorously analyzes program outcomes to determine what drives success. Since 2009, EMPATH has used data to refine the Mobility Mentoring model, improving economic mobility outcomes for the participants. Changes in outcome include:

- In 2009 only 3% of participants got new jobs each year. In 2019, that number improved to 64%.
- In 2009 only 1% of participants were building savings each year. Today, nearly all our participants have savings accounts, and even the participants living in the most crisis (those who are currently homeless) have saved an average of nearly \$1,200 during their time in the programs.

Setting and achieving goals is central to Mobility Mentoring. EMPATH research shows that the number of goals set by each participant drove increases in income, and hastened exits to permanent shelter for participants in family homeless shelters.

In addition to the benefits of mentoring, **guaranteed income has been shown to effectively reduce poverty and income inequality by providing a financial safety net.** Upon completion of enrollment and intake, each participant is provided a PEX card, which is a prepaid card that EMPATH utilizes to deliver \$251 in cash assistance to participants each month. Onset and continued distribution of cash assistance is contingent upon ongoing active participation and engagement with mentoring/coaching services. Of their total award, EMPATH reserved \$305,000 for monthly financial support.

About This Report

Newton Thrive had three program implementation goals to achieve in their first contract year.

The first goal focused on establishing both an organizational and programmatic presence in the City of Newton.



Goal 1

Establish EMPATH and Newton Thrive Community Presence

The second goal focused on working collaboratively with City contacts to develop eligibility criteria and processes to recruit and screen applicants that were consistent with the City's vision for the initiative.



Goal 2

Develop Eligibility Criteria, Application Process, and Screening to Ensure Priority Population Reached

The final goal was to enroll 50 participants, match them with a trained mentor, and begin coaching participants.



Goal 3

Enroll 50 Participants, Match Them with Mentors, and Begin Coaching

Collaboratively developed by the Newton Thrive team and an evaluation consultant from the UMass Donahue Institute, this report summarizes:

1. EMPATH's progress and accomplishments related to each of the program implementation goals beginning April 2023 through March 2024.
2. Newton Thrive implementation and early results.

In reviewing this report, it is important to note that the first five months of the program were focused on program development. During this time, no services were provided. Therefore, while this report covers a full year, it does not represent a full year of service delivery.

Year 1 Goals: Progress and Accomplishments

EMPath successfully established its community program and presence.

At the time they were selected to develop and implement Newton Thrive, EMPath had no visible presence in Newton and needed to hire staff for its Newton-focused project. Therefore, the City and EMPath built in a planning period to allow sufficient time for hiring and training staff, developing Newton Thrive materials, and establishing connections to and relationships with critical community organizations. Planning period [milestones and accomplishments](#) include:

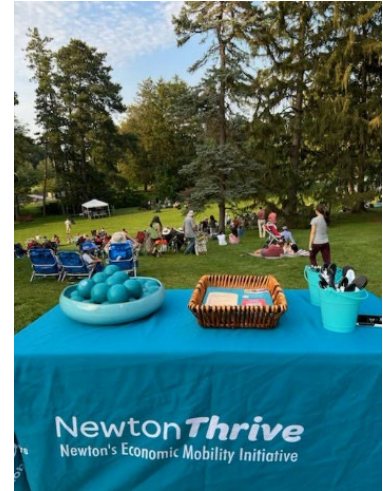


Goal 1
Establish EMPath and Newton Thrive Community Presence

- Hired, trained, and onboarded a program director and two mobility mentoring coaches.
- Produced English & Spanish versions of the program flyers, posters, and FAQs. Posted on EMPath’s website and used for direct community outreach.
- Distributed flyers to local businesses such as grocery stores, coffee shops, laundromats, and community bulletin boards. Shared flyers and FAQs with local service providers to share with eligible families in their programs.
- Hosted informational tables twice weekly in the City at various locations, such as the Newton Free Library, the Newton Food Pantry, the Farmers Market, Summer Concert Series, the Newton Centre MBTA station, and City Hall.
- Shared program information on various social media channels, the Mayor’s accounts, and other relevant City social accounts. Also shared weekly program and community events updates on MeetUp, Next Door, and in Newton Facebook community groups.
- Shared schedule of community events on the Newton Thrive website (updated in real-time), as well as on EMPath’s and the Mayor’s social media channels.
- Created a communications toolkit document (including sample social content and newsletter language) in English and Spanish. The toolkit was shared with local community providers to share about the program with their networks.
- Contacted local media outlets, like the Fig City News, who shared enrollment information about Newton Thrive and posted about our kick-off event in June.
- Launched Newton Thrive at a community event on June 13, 2023. Mayor Fuller and EMPath staff spoke at the event. The event was well-attended by community members.



A significant component of the planning period focused on **establishing a presence** in Newton and connecting with community residents and providers. As such, the outreach and marketing strategy was comprehensive, utilizing a combination of media and community engagement approaches to ensure messaging about the new initiative was effectively conveyed to the target audience.



Mayor Fuller, EMPath President and CEO, Kim Janey, and the EMPath team introduce Newton Thrive on June 13, 2023. The session, held at Weeks House, was attended by approximately 40 community providers and residents.



EMPath collaborated with City of Newton to reach those in the community most in need.

Newton Thrive is being funded with a portion of Newton’s American Recovery Plan Act (ARPA) allocation. As such, the initiative purposefully seeks to serve Newton families most impacted by the COVID-19 pandemic with an emphasis on people of color who were disproportionately harmed as well as those who are homeless or at-risk of homelessness, living in subsidized housing, or who are otherwise struggling.



Goal 2
 Develop Eligibility Criteria, Application Process, and Screening to Ensure Priority Population Reached

To ensure that the initiative reaches the priority population, EMPath collaborated with the City to develop eligibility criteria for participation. Given that the program is limited to 50 families, it was particularly important to be clear, transparent, and consistent about who is eligible to participate.

To be eligible for Newton Thrive, you must...
✓ Be a Newton resident, and the only household member enrolled
✓ Have children younger than 18 in your household or be pregnant
✓ Be 18 to 60 years old
✓ Have an income at or below 50% of the area median income (AMI)
✓ Be interested and able to work in the U.S.
✓ Be willing to meet with a mentor regularly

Once the eligibility criteria were established, EMPath made an application form available to its newly established network of community residents and providers. In addition, EMPath partnered with the Davis System, a community-centered consultant group that specializes in grassroots recruitment strategies, from July to September 2023.

Newton Thrive began receiving applications in June 2023, following the program launch event on June 13, 2023. EMPath accepted applications through early January 2024. There was tremendous interest in the program. Within one month, Newton Thrive received 66 applications and by early January 2024 had 126 applications for 50 program slots.

Eligibility assessment interviews started in July 2023 and continued until January 2024. Many of the applications were submitted directly by the applicants while others were submitted by community providers, neighbors, or friends on behalf of the applicant. Each application was reviewed by the Newton Thrive team, and applicants were contacted to review their eligibility for and commitment to the program. Once assessed, applicants were required to submit documentation to verify eligibility (e.g., 50% AMI, presence of a minor child/pregnant, authorized to work, etc.) prior to program enrollment.

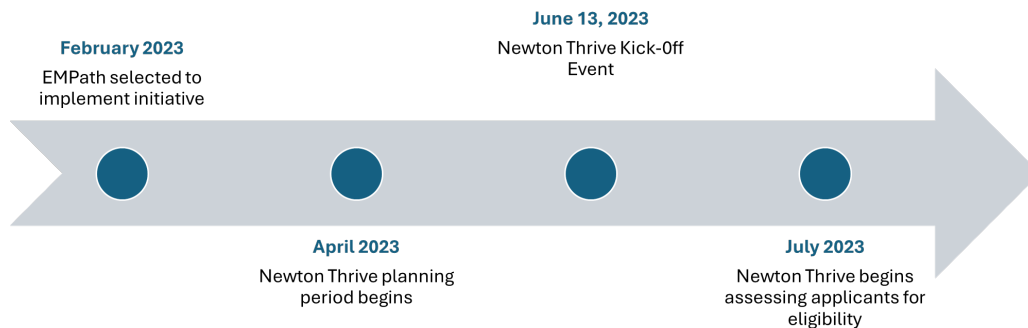
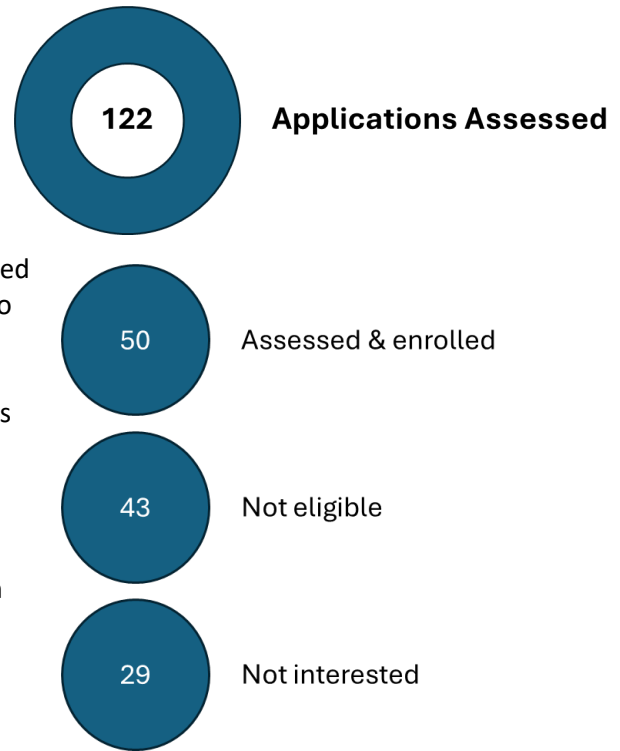
Thorough assessment of 122 applicants was an ongoing process beginning in July 2023 and concluding in early January 2024.

Significant effort was expended to reach every applicant. The Newton Thrive team repeatedly attempted to contact each applicant and schedule appointments to review their application, share additional information about program requirements, and assess their commitment to a 2-year program. Overall, 29 applicants were either not reached for assessment or, when reached, were no longer interested in participation.

Once assessed, applicants meeting the criteria and demonstrating commitment to the program were again contacted by the Newton Thrive team to gather verification documents.

After assessment and verification, 43 applicants were not eligible for participation.

- 32% did not meet the income requirement or could not verify their household income
- 16% did not have children younger than 18 living in the household
- 13% were not authorized to work in the U.S.
- 13% were household members of another applicant
- 12% were not a good fit for the program
- 11% did not meet multiple criteria
- 8% were unable to work due to disability
- 8% were over the age limit



By early January 2024, Newton Thrive was providing coaching to 41 participants.

As with the assessment process, program enrollment was ongoing, with the first 23 participants enrolled, matched with a mentor, and receiving services by the end of September 2023. Enrollment and the launch of services for an additional 18 participants continued on a rolling basis through January 2024.

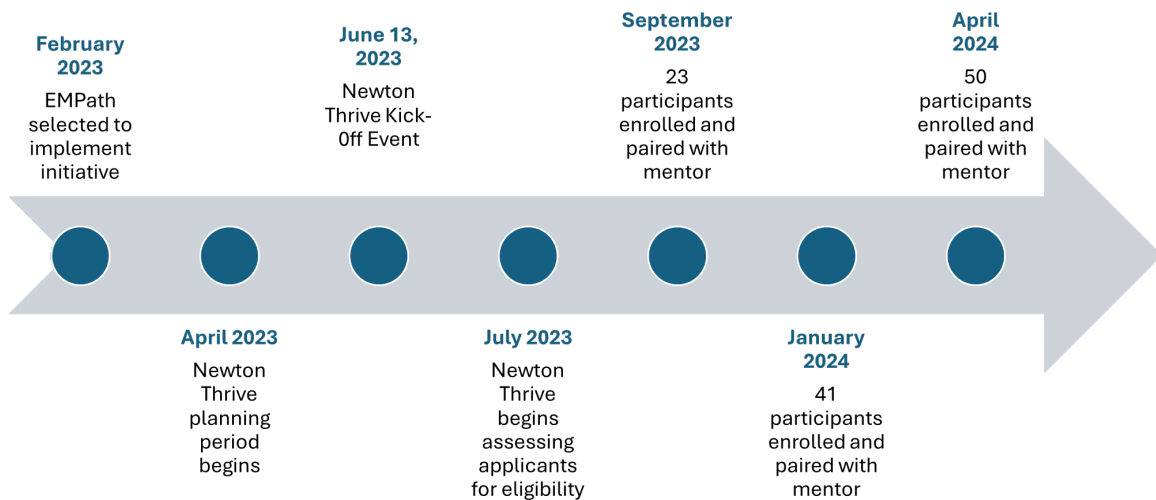


Goal 3

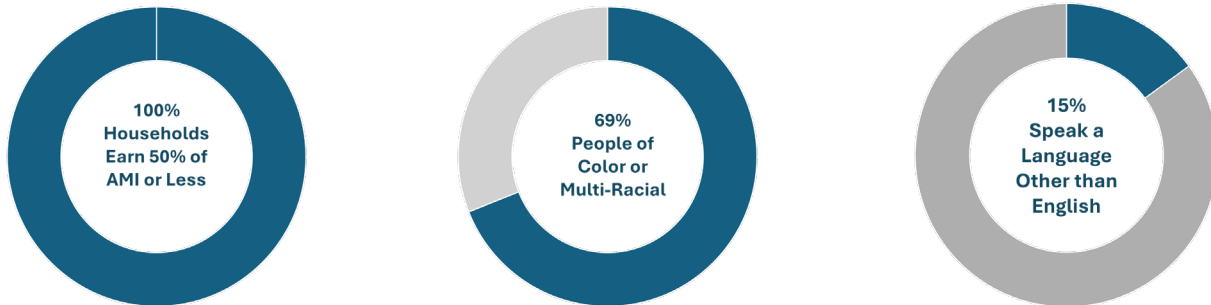
Enroll 50 Participants, Match Them with Mentors, and Begin Coaching

Although the goal was to have all 50 participants enrolled and receiving services by the end of the first year (March 31, 2024), coaching for nine participants did not begin until April 2024. In October 2023, one of the newly hired and trained mobility mentors left the team. Recruitment for the open position began immediately, and the position was filled in February 2024. To ensure a seamless transition and minimal disruption to participants who had already initiated services, other mentors from within the EMPath team were temporarily assigned the caseload and stayed connected with participants throughout the four months it took to hire and onboard a new mentor. Coaching for the remaining nine participants commenced in April once the new mentor was fully trained.

As of the week of April 8, 2024, all 50 participants were enrolled, paired with a mentor, and receiving services.

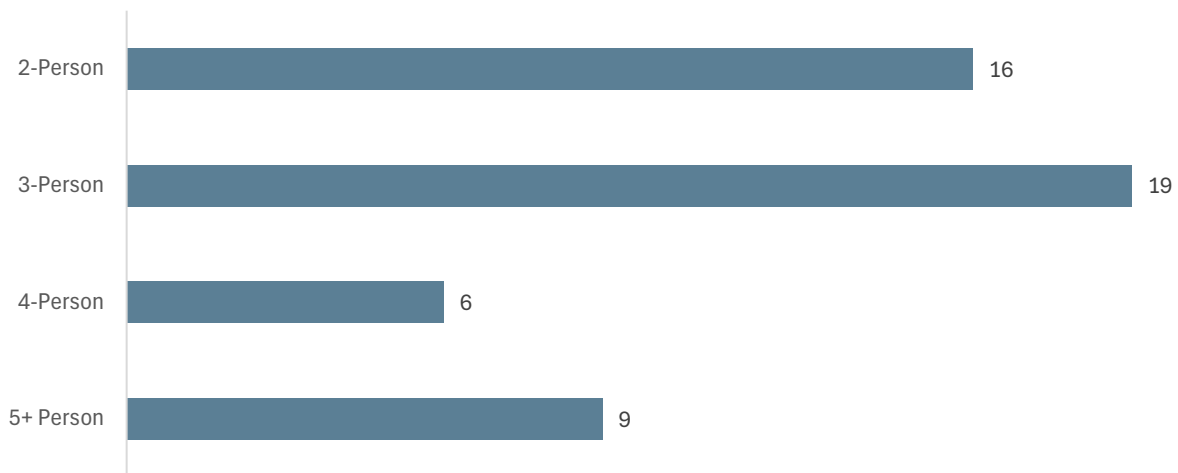


The characteristics of the enrolled participants demonstrate that Newton Thrive successfully reached the target population.



All participants are low-income Newton residents¹, 69% identify as a person of color or as multi-racial, and 15% speak a language other than English.

Newton Thrive is intended to support families with children, which is why one of the eligibility criteria is that a participant must have at least one minor child in the household. Of the 50 enrolled participants, nearly **one-third are single adults with one child** younger than 18 living in the household and 38% are either single adults with two minor children or two adults with one minor child.



To be eligible for Newton Thrive, residents must adults aged 60 or younger. Overall, the average age for those enrolled is 41, with a range of 24 years to 58 years of age.

¹ Area Median Income (AMI) varies by community and is dependent upon household size. In 2023, 50% AMI for a 2-person household in Newton was \$59,400 and for a 3-person household it was \$66,800. <https://www.bostonplans.org/getattachment/abdbba98-72b6-4349-be8c-0666ceedf678>

Newton Thrive Program Implementation and Early Results

Newton Thrive provides intensive one-to-one economic mobility coaching to 50 low-income Newton residents, along with monthly cash assistance of \$251 per participant during their two-year enrollment. Each participant is paired one-on-one with a mentor who has been extensively trained in Mobility Mentoring. They meet as often as they like—checking in at least monthly—to reflect on where they are now, where they’d like to be, and what goals they want to set to get them there. The model has four essential elements:

Coaching for Economic Mobility

EMPath approaches coaching as a participant-directed one-on-one partnership. Coaches, called “Mobility Mentors”, work with participants to strengthen their decision-making, persistence, and resilience over time.

The Bridge to Self-Sufficiency®

EMPath’s Bridge framework is the foundational self-assessment tool for all the families in EMPATH’s programs. The Bridge includes five key pillars: family stability (including housing), well-being, financial management, education/training, and employment/career. This tool helps families understand where they are currently, where they want to go, and how different domains of their lives impact each other.

Goal Setting

Mentors support participants in prioritizing what goals they’d like to work on within the pillars of the Bridge, strategizing around potential barriers and challenges, and thinking through options for additional resources and support. Mentors offer encouragement, facilitate reflection, and help refocus if necessary.

Recognition

Recognition acknowledges and celebrates a participant when they are working toward and when they accomplish a goal.



Between September 12, 2023, and March 31, 2024, 41 participants were enrolled, onboarded, and began services.

By the end of March 2024:

- 23 participants enrolled by the end of September 2023 were onboarded and had 5 months of services
- 12 participants enrolled by the end of October 2023 were onboarded and had 4 months of services
- 3 participants enrolled by the end of November 2023 were onboarded and had 3 months of services
- 3 participants enrolled by early January 2024 were onboarded and had 2 months of services

EMPath’s Mobility Mentoring model requires a **long-term commitment, where mentors and participants work together over multiple years to achieve participants’ goals**. Once enrolled in the program, participants complete an extensive intake process. Participants are oriented to the model and provided information about their roles and responsibilities, as well as those of their mentor. In addition to meeting their mentor, reviewing and signing a commitment contract, and signing various consents, extensive information is gathered to develop participant profiles in EMPATH’s participant tracking database.

As shown in the figure below, coaching begins in the second month of services and goal setting in the third month. However, for this model to work, several things must occur in the first few months before coaching and goal setting begin, including trust-building, assessment, and stabilization. This is particularly important when participants enter the program facing barriers to economic stability.

First Year Service Provision Framework

1 Month	2-3 Months	3-6 Months	6+ Months	12 Months
<p>INTAKE & ONBOARDING</p> <p><i>MM Assignment</i></p> <p><i>Program Overview</i></p> <p><i>Sign Commitment Contract</i></p> <p><i>Share Program Handbook</i></p> <p><i>Apricot Policy and Confidentiality Agreement</i></p> <p><i>Credit Report Consent</i></p> <p><i>W9 form</i></p>	<p>INITIAL COACHING</p> <p><i>Bi-weekly MM Coaching Sessions</i></p> <p><i>Bridge Conversation</i></p> <p><i>Goal-setting Process</i></p> <p><i>Complete service plan (multiyear plan recommended)</i></p>	<p>CONTINUED COACHING</p> <p><i>Monthly MM Coaching Sessions (meeting frequency may be increased if needed to progress)</i></p> <p><i>Review Goals</i></p> <p><i>Review Progress at Sixth-month Mark</i></p>	<p>CONTINUED COACHING</p> <p><i>Monthly MM Coaching Sessions (meeting frequency may be increased if needed to progress)</i></p> <p><i>Review Goals</i></p>	<p>EVALUATION</p> <p><i>Annual Assessments</i></p> <p><i>Conduct Bridge Conversation</i></p> <p><i>Review Multi-year Goal Plan</i></p>

Trust-building is critical to developing a successful mentoring relationship. For many participants, trust in service providers, in support systems, and in themselves may be eroded due to past experiences. Participants may come into the program feeling disappointed, hopeless, and unsure of their own self-worth and their ability to improve their lives. Often, foundational early work involves helping participants rebuild their hopes and aspirations, trust that they have self-worth, and believe that they can make positive change.

Assessment is an essential component of the initial months of services. During the first three months, mentors use research-backed tools provided by EMPATH to assess where participants currently are in terms of family stability, well-being, financial management, education and training, and employment and career management. During this process, mentors come to understand each participant's circumstances and the barriers they face to economic mobility.

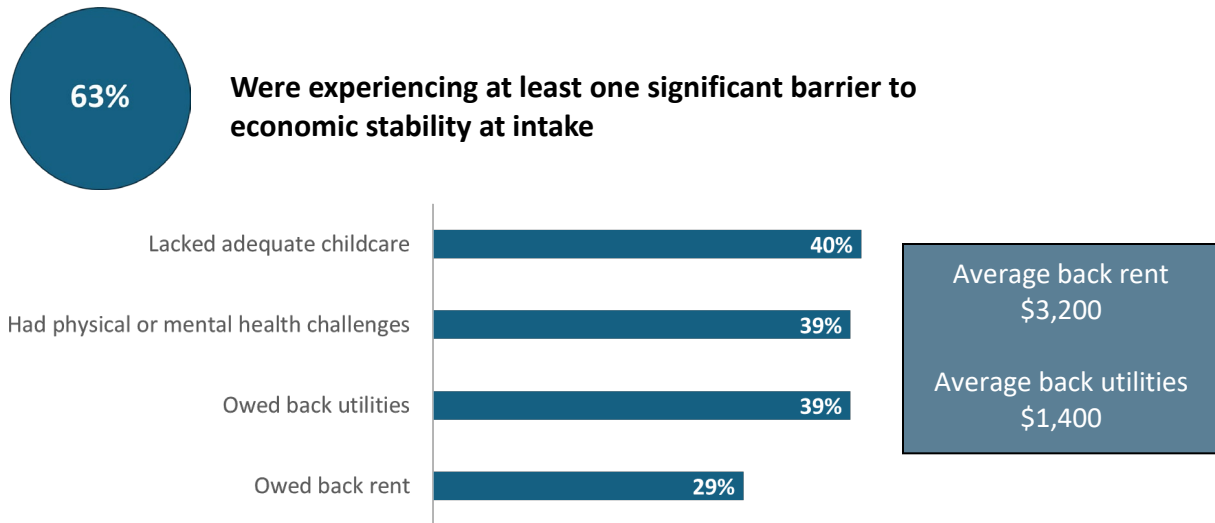
Stabilization is a key component of initial work with participants, particularly during the initial three or four months. Progress toward economic mobility is not possible for participants at risk of losing their housing, experiencing food insecurity, and struggling with debt. Prior to setting aspirational mobility goals, mentors work with participants to stabilize their lives. In addition to creating a solid foundation to achieve mobility, supporting participants' immediate needs builds trust and confidence.

A single mother of two children entered the program unemployed and facing financial hardships, struggling with utility bills and debt. After an initial focus on trust-building and comprehensive assessment, the participant shared her family's experience with homelessness and her long-term goal to be a homeowner. Prior to setting short-term achievable goals toward homeownership, early work with this participant centered on stabilization—finding employment and paying off debt.

A foreign-born, non-native English speaker entered the program unemployed despite having advanced degrees from her home country. Struggling with confidence in her English language skills and feeling unsure about applying for her first job in the United States, this participant had very low expectations about her prospects for employment. Early work with this participant focused on building trust and strengthening her confidence to pursue employment commensurate with her education, skills, and training.

A single father of two children entered the program with irregular employment and struggling with debt. Facing significant rental arrears and at high risk for homelessness, he found it challenging to discuss his current situation and aspirations for the future. Early work with this participant focused on helping him understand the importance maintaining consistent work rather than just working to cover urgent bills and teaching him the concrete skills (e.g., using Zoom, professional email communication) needed to secure better employment.

As demonstrated by the previous examples, participants faced significant challenges to economic stability at intake.



Guaranteed monthly income helps Newton Thrive participants afford basic needs and achieve economic stability.

Newton Thrive participants who regularly meet with their mobility mentor and actively engage in the program receive monthly cash assistance of \$251. Upon enrollment, each participant was issued a personalized PEX card. Funds are distributed on the first of every month using a PEX Visa Prepaid Card, which is designed to function similarly to a debit card. Cardholders have the flexibility to make purchases at any location that accepts debit cards, whether it's online or in person. However, the PEX card cannot be used for making cash withdrawals, or for transactions through Venmo, CashApp, or Zelle.

Although a smaller amount than other efforts in the area, such as [Cambridge Rise](#), which provides \$500 per month to single parents, data gathered on how participants spend their additional income suggest that even a small sum helps families meet basic needs. Through April 2024, Newton Thrive distributed \$77,062 to participants. Of this, \$68,965 was spent on 2,353 transactions and \$8,097 was saved. Unspent funds remain on the card, allowing participants to save money securely and conveniently. In fact, one participant is explicitly saving every dollar (\$2,008 through April) for a car.

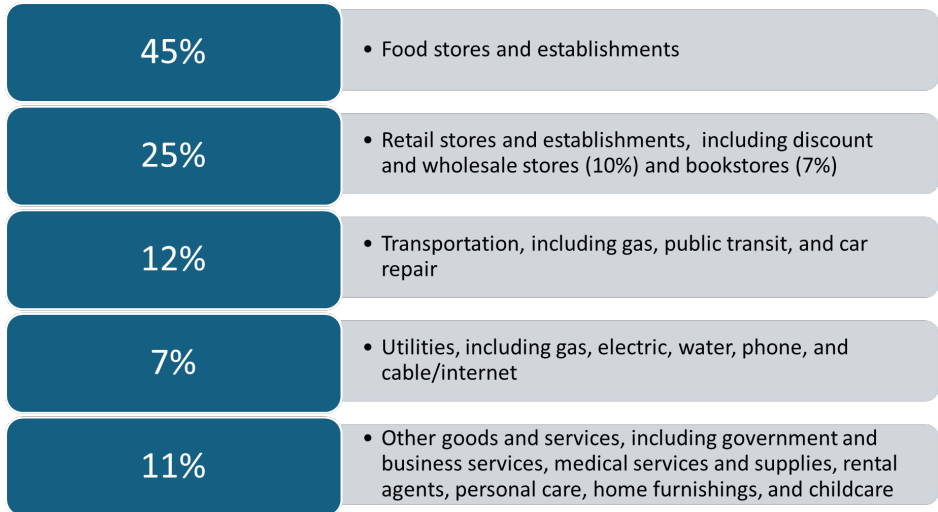
Top Four Expense Categories

Overall, food, retail, transportation, and utilities are the most common expenditures.

Expense Categories	Total Spent	Number Transactions	Average per Transaction
Food	\$30,776.50	1,154	\$27
Retail	\$17,376.85	534	\$33
Transportation	\$8,133.56	356	\$23
Utilities	\$4,715.42	78	\$60

Source: PEX Card transaction report, April 2024.

88% of participants' monthly assistance was spent on food, retail purchases, transportation, and utilities.



It's the first Monday of the new month and I am in line at Trader Joe's with my kids. The kids are entertaining the cashier in typical kid fashion, and all are oblivious to my growing discomfort. I am trying to mentally add up the items as the cashier scans them. I need them all, but I have only \$25.00 or maybe \$30.00 total across two bank accounts. I am really starting to panic because we have gone without lotion for several months because it is so expensive. I have gotten around it by using cooking oil because it rings up as a food item with my food stamps, but my food stamps won't come in for another week and a half. The bill comes to just over \$30.00, and I start to think about what I will have to leave behind. I anticipate my children's whining because we don't need and cannot afford the snack item that they wanted. Then I remember that the PEX Card loads closer to the beginning of the month, but I cannot recall what day. I decide to try it. It works. I breathe again. I will not be embarrassed again as I hold up the line in the grocery store while I try to make difficult choices. It might seem like a simple thing, having to make difficult decisions, as we are all adults and we all have to do this from time to time. But I would be lying if I said that it has never crossed my mind to pocket a roll of toilet paper from a public restroom to help us get by until I can earn more money. I have not done this, but I have considered it. Not making enough money to consistently meet your family's most basic needs can cause you to reconsider your own ethics. Knowing that you have the monthly assistance is a peace of mind. I may be able to get the car repaired if it breaks or I can simply buy a personal item like lotion. The PEX card provides peace of mind.

As a single mom of a 6-month-old living in Newton, The Newton Thrive Economic Mobility Services has truly changed our lives. I am currently unemployed and in need of rental assistance, and Gamuchirai has gone above and beyond to find rental assistance programs throughout Massachusetts for me and my son. Thankfully, this program has helped me find resources for housing assistance when I had no other options. This program is truly doing God's work. I use the \$250 monthly stipend to purchase formula for my baby. It would be extremely difficult to purchase if I didn't have that money coming through each month. Thank you, Newton Thrive, for all that you do; you are truly changing the lives of families like mine.

Newton Thrive participants face daily challenges to setting and achieving economic mobility goals.

To fully understand the challenges to economic mobility facing participants, it is important to consider the impact of poverty and trauma on their daily lived experience and functioning. Paying for diapers, food, housing, transportation, childcare, and life's other necessities can be difficult for families living far above 50% AMI. For those living in poverty, meeting basic needs often forces them to make impossibly tough choices. The constant stress and anxiety they experience makes it more difficult to have the mental bandwidth to plan for and pursue a better life. Furthermore, systemic issues, such as the lack of affordable housing and affordable, quality childcare, trap people in poverty and prevent families from climbing the economic ladder.

Emerging science reveals that poverty profoundly and predictably influences human behavior and decision-making, often making it more difficult for people experiencing poverty to advance (Mullainathan & Shafir, 2013). The stress resulting from poverty, trauma, and oppression fundamentally alters brain development and function throughout an individual's life. Among other things, the impact of poverty affects planning and organization (ability to create, maintain, and follow plans to achieve specific objectives), problem-solving (capacity to identify solutions to complex or novel situations), self-monitoring (ability to assess and adjust one's behavior to align with long-term goals or social expectations), and decision-making (process of evaluating options and making choices based on goals, preferences, and potential consequences). These functions allow individuals to engage in goal-directed behavior, regulate their actions, and adapt to new and complex situations. The Newton Thrive model acknowledges this reality and provides families with the kind of support needed to move forward.

Boston Globe Opinion June 5, 2024

Newton augments guaranteed income program with mentorship, coaching

Esmy Jimenez's article about the success of guaranteed income hit home for me, as a participant in the Newton Thrive program.

The partnership between Economic Mobility Pathways and the City of Newton combines \$250 of monthly guaranteed income with one-on-one support from an economic mobility coach. My EMPATH mentor has helped me reflect on where I was and where I want to go in the short and long term. I have opened a high-yield savings account, am working on my associate's degree, and have greater tools and resources as I work toward buying a home one day.

In addition, the cash assistance has been life-changing for me, a single mom working a full-time job while running a small transportation business on the side. It makes my food bill more manageable and keeps my budget on track.

Newton Thrive has helped me move forward faster than if I had been receiving cash assistance alone. I believe the support of a mentor has potential to turbocharge guaranteed income programs.

TONI FULLER
Newton

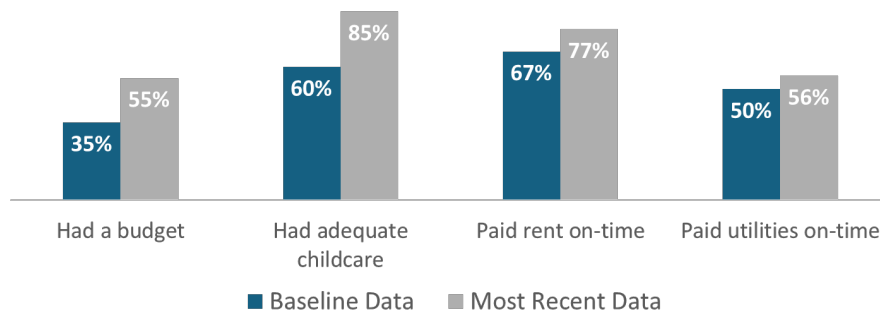
Despite challenges, Newton Thrive participants are taking critical first steps to economic mobility and achieving short-term goals.

Participants are moving beyond their anxieties, fears, disappointments, and insecurities. They are beginning to put their lives into perspective and are planning for the future. This is evident in their setting of short-term, achievable goals (i.e., steps to achieving their longer-term economic mobility goals). Initial steps toward longer-term mobility goals taken by Newton Thrive participants include:

- Paying off debts
- Starting to save
- Reviewing credit reports
- Exploring career options and initiating conversations with Career and Financial Specialists at EMPATH
- Creating or updating resumes
- Starting a job search
- Beginning job training
- Registering for ESOL/ESL classes
- Obtaining driver’s licenses
- Finding childcare
- Getting more connected and engaged with the wider Newton community
- Working on fitness and wellness goals

Much of mentors’ and participants’ work during the early implementation of Newton Thrive has focused on establishing a foundation of economic stability. From participants’ first data collection point to their most recent data collection point, the percentage of participants using a monthly budget has increased from 35% to 55%, and the percentage of participants with children who have adequate childcare has increased from 60% to 85%. Although, the percentages of participants who have paid their rent and utilities on time have not increased much, there have been modest increases.

Documented Changes in Economic Stability



Newton Thrive participants are also beginning to take significant steps toward establishing a foundation for economic mobility. As of March 31, 41% of participants participated in an education or training program, and 29% completed job search activities. Paying debt to establish a foundation of financial stability has also been a focus, with 41% of participants having made payments toward debt, with an average total amount paid of \$480.

Steps Toward Establishing a Foundation for Mobility

Of the 41 participants, those who have...	Number	Percent
Participated in education/training	17	41%
Completed job search activities	29	29%
Created resume or cover letter	6	15%
Searched for job openings	11	27%
Submitted job applications	8	20%
Paid debt	17	41%

Year 2 Implementation

Newton Thrive had a successful initial year. The program was developed, EMPATH's presence was established, and at the start of Year 2 (April 2024), all 50 participants were enrolled and receiving coaching.

Priorities for Year 2 implementation include:

1. Ongoing participant engagement and retention
2. Exploring opportunities for more in-person engagement
3. Offering economic mobility workshops and group training
4. Training mentors in the Tech Goes Home program
5. Supporting participants to identify longer-term goals
6. Reporting on additional outcomes, such as changes in income
7. Developing plans for participants beyond the 2-year program

EMPATH looks forward to continued collaboration with the City and Newton and UMDI on this initiative, and is excited to support, acknowledge, and celebrate participants' achievements in the coming year.

06.3.2024

Inclusionary Zoning Analysis Update

Barney,

To
Barney Heath, Director of
Planning and Development
City of Newton

From
Kyle Talente, President
RKG Associates, Inc.

Re
Inclusionary Zoning
Development Finance
Impact Study Update

On behalf of RKG Associates, Inc., I am pleased to provide this Proposal to the City of Newton. We are excited about the potential to work with the City again on updating the market and financial impact analysis related to the City's Inclusionary Zoning (IZ) policy. Over the past five years, the housing market in Newton (and the rest of the U.S.) has changed substantially. Reviewing the successes and challenges of the City's current IZ policy in order to refine requirements is essential to ensure any proposed changes meet the City's vision while mitigating the potential to adversely impact growth and development.

As you know, our approach to financial feasibility modeling is to build custom, locally sourced models that enable our clients to assess the impacts of projects using several project variables. For example, we understand the City Council is considering changing the minimum project size that triggers the IZ policy. In addition to simply understanding the financial impact on smaller projects (going from 7 to 4), RKG Associates' experience in Newton tells us the model also needs to account for location and type of project. Simply put, developing a 4-unit project in Upper Newton Falls has a different market potential and financial opportunity than a project in Newton Center. To this point, our model approach will follow the previous effort to afford the City the comprehensive assessment to test a variety of location, type, size, and target of project.

Based on our ongoing conversation, we are proposing the following scope of services to the City.

Assessment of Housing Development Policy Effectiveness – RKG Associates will perform a quantitative and qualitative analysis of the City's current IZ policy to understand its effectiveness. From a quantitative approach, RKG will measure the development of IZ projects in Newton over the previous five years (2019-2023) with activity levels from 2014-2018. The assessment will consider the volume, location, and characteristics of these developments. RKG also will check the City's IZ spreadsheet to help in assessing how the spreadsheet can be simplified and working to develop it into a form that can be given to developers to fill out themselves. As part of this assessment, RKG will hold up to eight (8) interviews with for-profit and/or non-profit developers active in Newton to gather qualitative data to complement the quantitative analysis. RKG will work with the City on identifying the most appropriate individuals to engage.

Assessment of Resident Support Effectiveness – The City has interest in understanding how social service support is (or is not) implemented for residents that occupy IZ units. First, RKG will engage with up to eight (8) social service providers (public, non-profit, and private) to understand how many IZ residents use/require support services (e.g., transportation support). This will be a confidential process where RKG will engage service providers on usage numbers and avoid personal information about specific residents. Second, RKG will assess how these

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residents and providers are connected to identify opportunities for the City to be more proactive in assisting IZ unit residents to gain these services.

Process Review – RKG Associates will perform a detailed review of the City’s existing IZ policies and procedures to identify opportunities to improve efficiency and effectiveness in meeting the City’s stated housing diversity goals. The analysis will consider the procedural requirements, the process flow, and fee or cost structures (e.g., payments for the monitoring process), and specific requirements based on size, location, or target market. RKG Associates will work closely with City staff to review and assess each component of the existing policy, holding one-on-one meetings with staff engaged in the implementation and/or oversight of the IZ process. RKG will use the interviews with developers to get the user perspective of the City’s approval process. The results will provide the foundation for recommendations following the financial feasibility analysis.

Goals and Vision – As with any community, goals and vision for the future evolve over time. The previous analysis focused on specific goals and vision defined prior to COVID-19. RKG recognizes that the city’s future endeavors with inclusionary zoning reflect current priorities. To this point, RKG proposes a series of interviews and work sessions with city staff and the Council to revisit previous goals and vision to ensure the feasibility analysis focuses on those priorities most germane in 2024. RKG proposes twelve (12) one-on-one meetings and two (2) workshops to discuss and finalize revised goals and objectives for the IZ policy.

Model Update – RKG Associates will revise the City’s Excel-based financial feasibility model so that the iterative analyses of various residential development types accounting for changing market conditions undertaken for this analysis reflect current market conditions. RKG will update the model to incorporate our current formatting and assessment approach, ensuring Newton’s analysis reflects RKG’s up-to-date methodology. The model will retain the flexibility to test different types and sizes of project and will retain its four (4) unique development area locations. However, RKG and the city staff will redefine those boundaries based on the goals and vision task (if necessary) to reflect the city’s current analysis needs. RKG will provide the model to Newton upon completion of the project to use for subsequent internal analysis.

RKG Associates understands that there is specific interest in assessing the policy and feasibility of elderly assisted housing projects. The model will be configured to analyze these specific project types in addition to the existing uses, scale, and location analysis.

Recommendations – Based on the findings of the analysis and modeling, RKG Associates will provide the city with strategic recommendations on how to revise the current IZ policy to better position the city for success based on the revised goals, vision, and feasibility analysis. The recommendations will come under three (3) categories: [1] policy recommendations, [2] feasibility recommendations, and [3] procedural recommendations. For each category, RKG will

detail the specific challenge/opportunity and provide specific actions for the city's consideration. After an internal workshop with City staff to finalize the recommendations, RKG will host one (1) workshop with the Council to present the findings and address questions.

Meetings Timeline – The City has asked for additional workshop and Council meetings. To provide better understanding of the engagement process, RKG will implement the following meeting schedule with the City to complete this analysis.

Staff Workshop #1 – Project Kickoff

Overview of the project and timeline. City presentation of current IZ processes and policy requirements, existing IZ data, current IZ spreadsheet contents, and current processes and policies regarding support service engagement.

Housing Partnership Meeting #1 – Goals and Vision Input

RKG will moderate a discussion with the Housing Partnership to review current goals and vision for the City's IZ policy and solicit feedback on potential revision/evolution of the goals and vision to reflect Housing Partnership priorities.

City Council Meeting #1 – Goals and Vision Input

RKG will moderate a discussion with the City Council to review current goals and vision for the City's IZ policy and solicit feedback on potential revision/evolution of the goals and vision to reflect emerging Council considerations.

Staff Interviews (10)

RKG will interview relevant City staff regarding the IZ policy, process, implementation, and challenges/opportunities. RKG envisions participants will extend beyond the Planning and Development department.

Developer Interviews (8)

RKG will interview developers about current IZ policy impacts and engaging in the current IZ development review and implementation process.

Service Provider Interviews (8)

RKG will interview support service providers on how they engage IZ residents, the role of the City, and ways to improve the connection between them and IZ residents.

Workshop #2 – Process Findings Review and Model Presentation

Presentation of RKGs findings regarding the IZ development process, impacts of recent implementation, and support service engagement. RKG will present a framework for the updated model to staff to solicit feedback and support for the revised model construction and operation.

City Council One-on-One Interviews (8)

RKG will engage interested Council members (or focus groups of 2-3 Council members) to discuss specific interests, concerns, and objectives.

Workshop #3 – Model Findings and Initial Recommendation Discussion

RKG will moderate a workshop with City staff to present findings from the modeling effort and present initial recommendations relative to the IZ policy, process, and implementation. Staff will provide feedback on revision, addition, or removal of this initial list.

Housing Partnership Meeting #2 – Model Findings and Initial Recommendation Discussion

RKG will moderate a workshop with Housing Partnership to present findings from the modeling effort and present initial recommendations relative to the IZ policy, process, and implementation. RKG will incorporate feedback from the Housing Partnership with comments from Staff.

City Council Meeting #2 – Progress Update and Goals/Vision Discussion

RKG will present high-level findings from the financial analysis for the Council's consideration and review. RKG will present revised goals and vision for discussion and modification.

Workshop #4 – Revised Recommendation Discussion and Approval

RKG will engage with City staff to present a revised set of recommendations. This discussion will formalize strategies to be presented to the City Council for consideration.

City Council Meeting #3 – Strategy Presentation and Discussion

RKG will present the recommendations to the City Council for consideration and discussion. RKG will compile feedback with staff to create the final report.

TIMELINE

RKG Associates can complete the IZ analysis within five (5) months of notice to proceed. This timeline is contingent on timely meeting scheduling and review of RKG product from the city staff.

PROJECT EXPERIENCE

RKG Associates has substantial experience in analyzing the financial feasibility of creating and changing IZ policies. In addition to the work RKG has done with Newton, we have completed similar analyses throughout the U.S. Most notably, we have completed IZ studies for Somerville, Boston, Lynn, Portsmouth (NH), Nashua (NH), and Providence (RI) in New England.

KEY PROVISIONS OF NEWTON'S INCLUSIONARY ZONING ORDINANCE

For Newton Housing Partnership - July 23, 2024

PURPOSE

- Promote the public health, safety, and welfare by encouraging a diversity of housing opportunities for people of different income levels in the City;
- Provide for a full range of housing choices throughout the City for households of all incomes, ages, and sizes;
- Increase the production of affordable housing units to meet existing and anticipated housing needs within the City; and
- Work to overcome economic segregation regionally as well as within Newton, allowing the City to be a community of opportunity in which low and moderate-income households have the opportunity to advance economically.

RENTAL UNIT REQUIREMENTS

TIER LEVEL	7-20 UNITS	21-99 UNITS	100+ UNITS
Tier 1* (50-80% AMI)	15%	15%	15%
Tier 2 (1-10% AMI)	0%	2.5%	5%
Total	15%	17.5%	20%

**Tier 1 inclusionary units must average out to 65% AMI.*

EX: 4 IZ units are required, 2 are restricted at 50% AMI, 2 are restricted at 80% AMI.

OWNERSHIP UNIT REQUIREMENTS

TIER LEVEL	7-16 UNITS	17-20 UNITS	21-99 UNITS	100+ UNITS
Tier 1 (80% AMI)	15%	10%	10%	10%
Tier 2 (110% AMI)	0%	5%	7.5%	10%
Total	15%	15%	17.5%	20%

MAXIMUM MONTHLY HOUSING COSTS, SALES PRICES, AND RENTS

- Rental: Monthly housing costs, inclusive of rent, utility costs for heat, water, hot water, and electricity, 1 parking space, and including access to all amenities that are offered to tenants in the building, must not exceed 30% of the applicable household income limit for the Inclusionary Unit.
- Homeownership: Inclusionary units for sale are to be priced to be affordable to a household having a gross annual income 10 percentage points lower than the household income limit for the IZ unit. The monthly housing costs, inclusive of mortgage principal and interest, private mortgage insurance, property taxes, condominium and/or homeowner's association fees, hazard insurance, and 1 parking space, must not exceed 30% of the applicable household income limit for the Inclusionary Unit.
 - Down payment must be 3% of purchase price
 - Mortgage loan must be a 30-year fully amortizing mortgage for not more than 97% of the purchase price with a fixed interest rate that is not more than 2% points above the current MassHousing interest rate
 - Buyers will be eligible so long as their total housing costs, including the services above, do not exceed 38% of their income.

CASH PAYMENT OPTION

- An applicant may choose to forgo the requirements of the IZ ordinance if:
 - Project includes 7-9 units
 - By Special Permit of the City Council where the Council makes specific findings that there will be an unusual net benefit to achieving the City's housing objectives as a result of allowing a cash payment rather than requiring the development of the IZ unit(s)
 - For projects where the IZ requirement results in a fraction of a unit less than 0.5, the applicant may contribute a fraction cash payment to the City.
- Cash payment is based on the Total Development Costs (TDC), calculated *at least* once every three years by the Newton Housing Partnership
- Cash payment is split 50/50 between the Newton Affordable Housing Trust and the Newton Housing Authority.

DESIGN AND CONSTRUCTION

- Inclusionary units, and their parking spaces, must be proportionally distributed throughout the project
- The bedroom mix of the IZ units must be equal to the bedroom mix of the market-rate units
- IZ units must meet the following sizes:
 - Comparable in size to the market rate units
 - Whichever is greater: minimum square footage, as required by EOHLC's most current comprehensive permit guidelines **OR** have an average square footage of not less than 80% of the average square footage of that of the market rate units.

DESIGN AND CONSTRUCTION (CONT.)

- Total square footage of the IZ units must not be less than 10% of the sum of the total square footage of all market-rate and IZ units
- Exteriors of IZ units must be indistinguishable
- Materials used and the quality of construction must be equal to that of the market rate units
- IZ units must have equivalent accessibility
- IZ units must have equal access to all amenities

Revised Proposed Plans for Northland Needham Street

D Rockwell
9/12/24

Main point:

Northland Investments is seeking an amendment to the Special Permit approved 12/2/19 by the City Council, in response to the collapse of the office market. The amendment eliminates all the office space, retains the retail space, and adds 22 units of housing, resulting in 822 units instead of 800. They hope to get to Land Use Committee soon, and to City Council in October.

Key Changes

Original Proposal	New Proposal	Difference
22.7 acres on three lots	22.7 acres on three lots	No change to site
193,200sf office	Zero office space	-193,000sf (-100%)
115,114sf retail	115,114sf retail	No change
800 total housing units	822 total housing units	+22 units (+2.7%)
660 market-rate units	678 market-rate units	+18 units (+2.7%)
140 affordable units*	144 affordable units**	+ 4 units (2.8%)
15 new buildings, adaptive re-use of mill for office	10 new buildings, adaptive re-use of mill for housing	Eliminate 5 small buildings, reduce footprint of two others, more open space
1,350 parking spaces (surface and underground)	1,050 parking spaces (none underground)	300 fewer spaces (23% reduction); 125 new spaces in rear where five small buildings would be eliminated

*120 units at average of 65% AMI (15% of total units), 20 units at between 80 and 110% AMI (2.5% of total units)

**Precise affordability targeting still being studied, likely to be in same ratio as with original proposal

Other developer commitments unchanged:

1. \$5.0 million for traffic mitigation measures
2. \$1.5 million for Countryside Elementary School
3. \$1.0 million for a public splash park
4. \$1.85 million for Inflow and Infiltration (I&I) fees (could be scaled down due to smaller project size)
5. Environmental commitments (Passive House for all buildings, all electric, EV stations, removing invasive species and clean-up and protection of South Meadow Brook, extensive landscaping, removal of dirty soils) all unchanged
6. Sitework has already cost developer \$73 million, paid to date out of pocket
7. Connection to transit – shuttle not being eliminated, but reduced to a level which developer will determine, with oversight from Planning Department, based on actual demand once about 50% of the planned units have been built and occupied.

Revised Proposed Plans for Riverside Development

D Rockwell
DRAFT 9/10/24

Main point:

Mark Development is seeking an amendment to the Special Permit approved 9/9/21 by the City Council, in response to the collapse of the lab and office markets. The amendment reduces the size of the site from 13 acres to 9 acres, leaving 4 acres nearest the MBTA station for continued operation by the MBTA as commuter parking; eliminates all the lab and office space; cuts the retail space, and increases the housing component by 131 units (24%). They hope to get to Land Use Committee and then to City Council this fall.

Key Changes

Original Proposal	New Proposal	Difference
13 acres	9 acres	-4 acres
1,025,000sf total built space	875,000 total built space	-152,000sf (-15%)
10 buildings	4 buildings	6 fewer buildings
450,000sf life science and office space	No life science or office space	-450,000sf (-100%)
20,000sf retail	10,000sf retail	-10,000sf (-50%)
550 total housing units	681 total housing units	+131 units (+24%)
440 market-rate units	544 market-rate units	+104 units (+24%)
110 affordable units (20% of total)*	137 affordable units (20% of total)**	+ 27 units (+24%)
1,000 parking spaces	650 parking spaces	350 fewer spaces (35% reduction)

*88 units (80% of total affordable units) at average of 65% AMI, with 3 units at 50% AMI; 22 units (20% of total affordable units) at between 80 and 110% AMI

**Affordability mix being studied, but developer said it will exceed requirements of Newton IZ Ordinance.

Other developer commitments:

1. Developer seeking to replace direct highway access to Rte 128 with an improved rotary
2. Unchanged:
 - o \$3.02 million for traffic and noise mitigation
 - o \$3.0 million contribution to State DCR for Riverside Trail Network
 - o \$1.5 million for Williams Elementary School
3. \$1.4 million for Inflow and Infiltration (I&I) fees (could be scaled down due to smaller project size)