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How can design reduce capital costs across the life cycle of a real estate project through efficient design and construction to preserve, sustain, and foster the unique character and identity of a community through public art, storefront improvements, and placemaking?

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**CHELSEA, MA**

Rose Fellowship 2019 – 21

Our Journey

Opportunity Communities, LLC (OppCo) is an exciting new joint-venture business model that holds promise for the next generation of community-driven development. Launched in April 2018, Opportunity Communities has a mission to increase the capacity of local community development nonprofits to develop thriving communities and to deliver housing opportunities for low and moderate-income households.

Opportunity Communities was co-founded by two highly experienced Greater Boston non-profits: The Neighborhood Developers (TND) and Nuestra Comunidad (Nuestra). Both TND and Nuestra serve low- and moderate-income households in their home communities that include Chelsea, Revere and Everett for TND, and Roxbury, Mattapan and Dorchester for Nuestra. The service areas of both organizations are majority-minority or Gateway communities.

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Learn about OPPCO's impact: [HERE](#)



OppCo believes that greater scale provides greater opportunity. The production and preservation of affordable homes, asset management and resident service – core lines of business for many community developers– all benefit from the efficiencies of scale. Yet there are equally compelling benefits to retaining a strong local presence and ownership of assets including deep knowledge of local needs and the ability to respond to them. OppCo provides a realistic way to grow capacity efficiently without sacrificing local focus. Through Opportunity Communities, TND and Nuestra are leveraging their combined resources and creating a common, shared set of core operations and programs with significantly more capacity than either organization can afford on its own while maintaining the community-based nature of each organization. The model is designed for scale. Up to ten locally-based community development organizations are expected to join as full members or to purchase specific contracted services during Opportunity Communities' first phase of scaling.

Organizational Culture

Opportunity Communities is itself an innovation, given its joint-venture model. The model sustains each member's distinct identity, independent non-profit status, and control over mission, assets, and strategy. What has merged are staffing and organizational structures to build greater capacity for administration and programming. All participating OppCo member staffs are employed by OppCo. Some staff focus all of their work at one location; other staff support activity centrally, or at one or more location. For example, in the real estate program, one Senior Vice President of Real Estate provides highlevel strategic and development expertise for OppCo communities, and supervises a real estate team that has staff dedicated to one location or working across locations. The Rose Fellow is expected to split his/her time between TND (70%) and Nuestra (30%) and will therefore report directly to the SVP of Real Estate with each local Director of Real Estate or a Project Manager playing the role of a close collaborating colleague on specific projects.

Within the real estate program, OppCo's members seek to leverage combined pipelines and resources to build greater capacity for real estate that will, over time, expand unit production over

current production rates, diversify project types, and expand capacity for community revitalization. Opportunity Communities supports its members to deliver greater real estate results by:

- › Bringing deeper real estate talent in-house to manage complex real estate deals and to support a greater diversity of project types; › Leveraging combined pipelines to attract investment equity;
- › Improving the confidence of lenders and investors who value highly capable staff that can deliver projects on time and on budget; and › Accelerating production rates and diversifying real estate products that meet pressing need for more homes for special need populations (seniors, disabled, e.g.) as well as extremely low-income, low-income, and workforce housing.

The Rose Fellow will support capacity building and innovation for OppCo to benefit current and future members. The Rose Fellow's work will support OppCo to address existing local conditions: high demand for affordable housing in a cost real estate market, rising construction costs, and greater threats of displacement of local residents and business owners as rents rise. To address these needs the Fellow will support two pieces of work:

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OppCo is a "young" organization that is building its capacity while completing business planning that will detail the pace and scale for OppCo's first phase of growth.

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1) Research and test design strategies that reduce capital costs across the life cycle of a real estate project through cost efficient design and construction and/or targeted or reduced rehab scope. There are a number of strategies that benefit from scale that OppCo's partners do not currently employ that hold promise for cost-efficient unit production. Examples: acquisition and preservation of Naturally Occurring Affordable Housing (NOAH)-proximate properties with a much more moderate rehab scope than we typically undertake; 10-20 unit developments that could be replicated in multiple communities and financed as single tax credit deal, thus addressing local desire for small scale, design efficiency, and financing scale.

2) Placemaking that is culturally aligned with the identity of our communities is one of OppCo's anti-displacement strategies. Public art that celebrates legacy communities contributes to a vital neighborhood that is enjoyed equally by residents and visitors.

The Opportunity Communities model has received an enthusiastic reception among funders, intermediaries and peer non-profits. Every funder, public agency head and intermediary has suggested one or more organizations that they think would benefit from joining Opportunity Communities. Five funders have made initial investments to support OppCo including NeighborWorks America, the Boston Foundation, Massachusetts Housing Partnership, Enterprise Partners, and the Massachusetts Department of Housing and Community Development.

Our Challenge

OppCo is a "young" organization that is building its capacity while completing business planning that will detail the pace and scale for OppCo's first phase of growth. Key organizational goals are detailed in the chart below. Those that are highlighted will benefit from the Rose Fellow activities. The promise of OppCo, and the results associated with achieving these goals, is a more sustainable, efficient and robust organizational structure for high-capacity community development activities.

FOCUS AREA 2019- 2020 GOALS

Business Planning & Expansion

Complete business planning to determine the scale for OppCo's first phase of growth, requirements for new member entry, financial modeling and opportunity for delivery of fee for services to smaller communities without a locally-based community development organization. Opportunity Communities expands to incorporate two to four additional members building a network of highly capable

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OppCo members adopt clearly defined common outcome metrics to provide common learning across agencies and serve as an underpinning for collective action and communication.

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results-driven affordable housing developers. Outreach to national community development organizations, funders and intermediaries identifies needs and opportunities outside of Massachusetts and our role in fostering replication.

Real Estate Development

Leverage combined pipelines and resources to build greater capacity for real estate that will, over time, expand unit production over current production rates and diversify project types. Produce or preserve 745 rental and ownership family units by 2021.

Evaluate vertically integrated homeownership programs that leverage Nuestra's first-time home buyer training, create brokerage services, and develop ownership housing regionally. Research and test design strategies to reduce capital costs across the life cycle of a real estate project through cost efficient design and construction and/or targeted or reduced rehab scope. Expand capacity to create and preserve thriving commercial and neighborhood spaces that preserve, sustain and foster local community culture and identity

Resident Services

Annually, implement best-practices Resident Services to assist 175+/- tenant families identified as at risk of displacement, due to late and/or overdue rent payments, to remain in their affordable homes. Explore the creation of senior MSW to support successful aging in community and to provide deeper supports for senior tenants and those with mental or physical disabilities.

Asset Management

Build capacity in the area of oversight of third-party property management. Expand the number of clients and partners utilizing OppCo's Asset Management services.

Financial Management & Administrative Systems Development

Build strong internal controls and more efficient financial management systems. Develop shared policies and procedures and standardized monthly and quarterly financial reporting. Deepen financial analysis and management of assets and investments. Foster diversity, equality, and inclusion through HR policies and practices; support staff advancement and professional growth; address cultural issues to enhance the workplace.

Learning & Evaluation

OppCo members adopt clearly defined common outcome metrics to provide common learning across agencies and serve as an underpinning for collective action and communication. Provide

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OppCo has hired an HR consultant to assist with the development of HR practices that recruit and support advancement for people of color, including a review of compensation, performance incentives, and performance management practices that support professional development.

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Learn about Chelsea, MA: [HERE](#)



high-quality database management services to members by replicating and building off of TND's sophisticated database.

Communications & Fundraising

Develop a strong Opportunity Communities brand. Build a strong organization by seeding the Opportunity Communities balance sheet and by securing \$900,000 of start up support for business planning and expansion activities.

Work Plan

Fellow Work plan: activities, targets and milestones for first 15 months (October 2019 - January 2021) Note: Fellow Work plan is subject to amendment prior to the beginning of the fellowship after discussions with the selected fellow and Enterprise and will be amended again before the start of the 2nd fellowship year.

Projects:

Project 1 ○ ----- ● **Project Goal**

Research and Design a process that reduces life cycle cost of a project

Improve our communities through an enriched community participatory development practice.

Project 2 ○ ----- ● **Project Goal**

Develop a community engagement process that fosters our communities unique identity.

Improve our communities through an enriched community participatory development practice.

Project 3 ○ ----- ● **Project Goal**

Co-Developed Project with OPPCO and the Rose fellow

Project geared towards mutual goals learned from the partnership.

For a more detailed version of the work plan: [HERE](#)



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Enterprise Rose Fellowship

The innovative model of the Enterprise Rose fellowship embeds architectural designers and artists in place-based community development organizations who are committed to improving the quality of design, sustainability and community engagement within their projects and throughout their organization.

Benefits of being a Rose Fellow

- + 2-year fellowship position
- + Annual stipend and benefits
- + Two annual, week-long fellowship retreats
- + Professional development allowance and opportunities

Qualifications

- + Applicants must have an accredited architecture degree in order to be considered for the fellowship:
- + NAAB-Accredited Professional Architecture degrees (B.Arch, M.Arch) are accepted for ALL positions
- + LAAB-Accredited Professional Landscape Architecture degrees (B.La, M.La) are accepted ONLY for the positions specified
- + Applicants must be eligible to work in the U.S. for the entire fellowship period

Learn more about the Rose Fellowship: [HERE](#)

Apply for the Rose Fellowship: [HERE](#)

Learn more about Enterprise Community Partners: [HERE](#)

Key dates:

FEB. 12 & 14	2:00 - 3:30 PM EST.	.....	Webinars: Informational "Meet the Hosts"
MAR. 14	2:00 - 3:00 PM EST.	.....	Webinar: Rose Fellows Application FAQ
APR. 14	12:00 AM EST.	.....	Application Deadline
JUNE 14	12:00 AM EST.	.....	Finalist Summit
JUNE 20 -JULY 30	N/A	.....	In-person interview /host org..
AUGUST 15	N/A	.....	Final decisions and notifications
OCT 1	N/A	.....	Fellowship begins

The Rose Fellowship in Numbers

Over 19 years there has been

76

2000 - 2019

fellows that have been hosted in over



different cities nationwide and who have partnered with



host organizations to design and develop more than

90

community facilities and over

11,000

units of affordable housing.

Mark Matel
Program Director, Rose Fellowship
mmatel@enterprisecommunity.org

Enterprise, Rose Fellow Work plan: activities, targets and milestones for first 15 months (October 2019 - January 2021)

Note: If your organization is selected, this Draft Fellow Work plan is subject to amendment prior to the beginning of the fellowship after discussions with the selected fellow and Enterprise and will be amended again before the start of the 2nd fellowship year.

Host Organization Name: Opportunity Communities, LLC (OppCo). Note, the Fellow is expected to dedicated the 70% of his/her work at The Neighborhood Developers, Inc. (TND) and 30% to Nuestra Comunidad (Nuestra). The Fellow will report directly to OppCo’s SVP of Real Estate and will collaborate closely with TND and Nuestra’s Real Estate Directors.

One-sentence project description	Host organization’s target goals with project	Fellow’s targets, Year 1	Milestones, Year 1	Expected Collaborators	Supervising architect and/or site planner
<p>The Fellow will complete a body of work to research and test design strategies to reduce capital costs across the life cycle of a real estate project through cost efficient design and construction and/or targeted or reduced rehab scope.</p>	<p>OppCo seeks to diversify its real estate production strategies and to streamline/standardize specifications to support affordable housing unit production and comprehensive anti-displacement efforts in our high-cost housing market. Goals are to understand how to leverage the opportunity in OppCo’s scale to sponsor cost-efficient unit production and preservation.</p> <ol style="list-style-type: none"> 1) Develop capacity for acquisition of Naturally Occurring Affordable Housing (NOAH)-proximate properties with a much more moderate rehab scope than we typically undertake, and with rehab spread over a longer period of time; 2) Test possibility of reducing cost through repetition of standard designs and methods for duplex in-fill homeownership. 3) Test the possibility of reducing cost through 10-20 unit developments that could be replicated in multiple communities and financed as single tax credit deal, thus addressing local desire for small scale, design efficiency, and financing scale. 4) Capture lessons learned to share with current and future OppCo members: 	<ol style="list-style-type: none"> 1) Research and assess options to control costs through means, methods, materials (e.g. standardized specs across interior finishes, fixtures, exterior finishes and more) and scope. 2) Test concepts with design and construction teams. 3) Prepare to field test design guidelines in year 2. 	<ol style="list-style-type: none"> 1) Facilitate the creation of design principles, guidelines, standards, and specs for OppCo members. 2) Incorporate results into existing projects and design guidelines where feasible. 3) Support efforts to field test design guidelines in year 2. 	<p>Various architectural, engineering firms; municipal planning departments</p>	<p>William Gordon, SVP of Real Estate, Opportunity Communities</p>
<p>The Fellow will support efforts to preserve, sustain, and foster the unique character and identity of our communities through public art, storefront improvements, and other placemaking.</p>	<p>Placemaking that is culturally aligned with the identity of an existing community is part of OppCo’s anti-displacement strategy. The Fellow will support community placemaking projects that are aligned with municipal goals. Opportunities include:</p> <ol style="list-style-type: none"> 1) Utilize the City of Chelsea’s 400th Anniversary (to occur in 2024) to create public art or a monument that celebrates the city’s Latino community as there is no art in the city that celebrates this sizeable community; 2) Develop a public art project in Revere’s Creative District; and 3) Support Nuestra’s development of public art and placemaking at Bartlett Station and other locations in Roxbury. 	<ol style="list-style-type: none"> 1) Establish project goals and work plans with one or more city. 2) Conduct outreach to identify partners and community leaders to populate a project committee who will provide oversight for the project. 3) Lead community constituents through a process to recommend potential sites, project scope, and design guidelines. 	<p>Complete readiness for a design competition.</p> <p>Scope out funding requirements.</p>	<p>City Planning Departments in Chelsea, Revere and/or Boston</p> <p>Local Chambers, community organizations, local leaders</p>	<p>William Gordon, SVP of Real Estate, Opportunity Communities</p>