

March 25, 2026
Meeting Packet

Meeting Agenda

Community Benefits Advisory Committee (CBAC) Meeting
Beth Israel Deaconess Medical Center (BIDMC)
Wednesday,
March 25, 2026
5:00 pm – 7:00 pm
In-Person at BIDMC

I. 5 minutes	Welcome and Introductions
II. 90 minutes	Jobs and Financial Security Grant Applicant Presentations
III. 20 minutes	Discussion and Voting
IV. 5 minutes	Next Steps and Adjourn

Next Meeting: June 24, 2026 (Virtual)

Beth Israel Deaconess Medical Center Community Benefits Advisory Committee Meeting

Nancy Kasen, Vice President, Community Benefits & Community Relations (CBCR),
BILH/BIDMC

Anna Spier, Manager, CBCR, BIDMC

Emmanuella René, Program Administrator, CBCR, BIDMC

March 25, 2026

Beth Israel Lahey Health 
Beth Israel Deaconess Medical Center

Welcome


Beth Israel Deaconess Medical Center

Content

- Welcome and Introductions
- Jobs and Financial Security Grant Application Presentations
 - Asian CDC
 - EMPATH
 - Fenway Forward
 - JVS Boston
 - Madison Park Development Corporation
 - Urban Edge
- Next Steps

Thank you Triniese!
Welcome Alex!



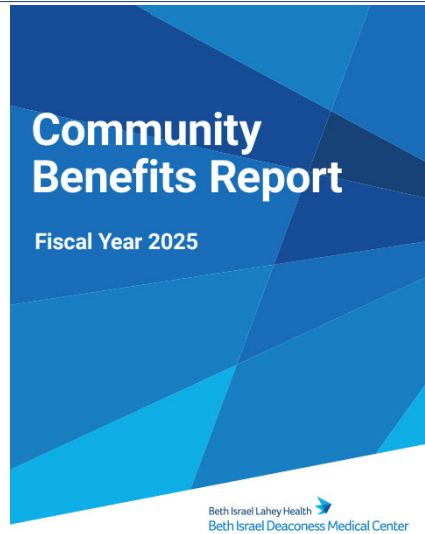
Triniese Polk
Boston Public
Health Commission



Alex Bonano
Boston Public
Health Commission

FY25 Community Benefits Report to the AGO

- Shared as part of the meeting materials
- Includes comprehensive information about BIDMC's Community Benefits programs and the valuation
- Any questions?
- Will be filed with the Office of the Attorney General later this week

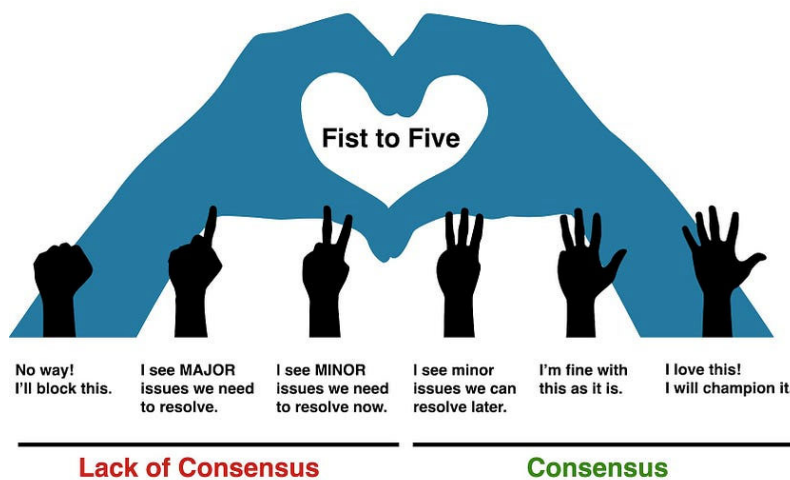


Jobs and Financial Security Presentations

Conflict of Interest Disclosures

- All members present have recently completed and shared their Conflict of Interest Disclosure Statements
- The MA Department of Public Health requires all members to disclose conflicts of interest including:
 - Financial interests (employment, contracts, consulting, or compensation from applicant organizations or potential grantees)
 - Organizational affiliations that could affect judgment
 - Personal or family relationships that could influence decision-making
- Members must recuse themselves from votes, decision-making discussions, and funding recommendations when they have a real or perceived conflict of interest
- Three members have disclosable conflicts that preclude them from participating in the discussion or vote

Voting Framework “Fist to Five”



Asian Community Development Corporation (ACDC)

Julia Zhu, Building Blocks Manager

March 25, 2026

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ACDC Overview

Mission Asian Community Development Corporation (ACDC) invests in Asian American and low-income communities by creating and preserving affordable and vibrant neighborhoods in Chinatown and Greater Boston.

Populations Served We primarily serve Asian immigrant and low-income individuals and families across Greater Boston, with a focus on Chinatown, Malden, and Quincy. Our financial and homebuyer programs primarily serve low- to moderate-income households. We serve constituents of all ages, from young children to elders. While some programs emphasize language access, our programs are open to people of all racial and ethnic backgrounds.

Senior Leadership All ACDC directors, including our executive director, are first or second-generation immigrants. 94% of our board are first- or second-generation immigrants.

Building Blocks: Helping Low-Income Households Work Towards Long-Term Financial Wellness

Building Blocks supports low-income families with homebuyer and financial literacy workshops, one-on-one counseling, and matched-savings programs that helps wage workers grow their savings and plan for their retirement. We serve Asian immigrant and low-income households across Greater Boston, including residents of BIDMC’s CBSA neighborhoods of Chinatown, Allston-Brighton, Dorchester, and Roxbury.

Evidence-Based Approach Our homebuyer workshops are CHAPA-certified (Citizens Housing & Planning Association) and meet the high education standards to empower future homebuyers with a diverse set of tools and resources. Our team consists of three, full-time housing counselors who are all HUD-certified. The HUD-approved method involves creating action plans for clients to improve their credit and increase their savings.

Goals, Outcomes, & Reach Building Blocks aims to help immigrant and low-income households create actionable pathways to establish financial wellness and build generational wealth, and work towards their homebuying and other financial goals. With support from BIDMC, ACDC’s Building Blocks program will:

- Educate 500 first-time homebuyers
- Provide at least 300 low-income individuals with one-on-one counseling
- Support at least 30 low-income households in purchasing their first home
- Engage up to 150 low-income and immigrant individuals in a matched savings program

Building Blocks: Helping Low-Income Households Work Towards Long-Term Financial Wellness

Timeline: April 2026-Mar 2028

- Monthly: monthly first-time homebuyer workshops in English or Chinese
- Bi-monthly/Quarterly: host financial literacy or retirement-focused workshops for matched savings clients
- Annually: enroll new cohorts of matched savings clients

Budget: April 2026-Mar 2028

Expense	Amount	Note
Staffing	\$244,345	3 full-time program staff
Fringe	\$44,500	Healthcare, vision, dental, 401k, etc.
Training	\$12,000	Staff stay updated on industry standards
Program Exp.	\$280,000	Savings matches
Total	\$581,645	

CITC Eligibility

For a two-year disbursement of \$100K per year, the full \$200K award can be eligible for CITC.

What Makes Building Blocks Unique?

- ACDC's Building Blocks program is the *only* program in Massachusetts, if not all of New England, that offers homebuyer and financial literacy programming by HUD-certified staff who are multilingual in English as well as Cantonese, Mandarin, and Toisanese.
- Over 60% of matched savings clients do not own a savings account before enrolling in our program.
- In addition to the programming mentioned, our staff also help homeowners secure emergency financial support if they fall behind on mortgage payments due to extenuating circumstances. We served hundreds of families who were financially impacted by the COVID-19 pandemic to help them secure RAFT funding so they could stay in their homes.

Q&A

Thank you for your time and consideration!



Economic Mobility Pathways (EMPath)

Carlos Moreno, Senior Director, Specialty Services
and Financial Specialist

Lauren Doty Brown, Senior Director of Development

March 25, 2026

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EMPath
Economic Mobility Pathways

Organization Overview

EMPath's mission is to transform people's lives by helping them move out of poverty and provide other institutions with the tools to systematically do the same.

Direct Service, Learning Network, Research & Advocacy

Mobility Mentoring®

Direct Service: Emergency Shelter Programs + Stabilization Programs

~800 Families (+ 14%) • 88% Women • ~550 Children

94% BIPOC • 48% Primary Language *not* English

32% w/ Disability or Chronic Condition

EMPath Leadership: 71% Women • President & CEO: Former Participant



EMPath
Economic Mobility Pathways

Employment Pathways Program

30 Participants • 2-Year Cohort • BIDMC CBSA



Individual Coaching



Group Learning



Flexible Funding



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EMPath
Economic Mobility Pathways

Employment Pathways Program



1. Assess current employment
2. Build career-readiness skills
3. Secure sustainable employment

Project Budget: \$108,200 over two years of programming

Project Timeline: July 2026 – Fall 2028

**Project Catchment: Shelter participants in Brighton, Mattapan, Dorchester
+ Families with low incomes in any BIDMC CBSA neighborhood**

- 100% set individualized SMART goals in employment, education, financial stability
- 60%+ secure employment within 12 months of enrollment
- 70% of employed participants retain employment for ≥ 90 days


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EMPath
Economic Mobility Pathways

Snapshots of Success

All Participants - Goals Set: 4,261  78% of Goals Met

Shelter Participants w/ Bank Accounts:  95%

Shelter Participants w/ Employment:  165%

Long-Term Mobility Participants' Employment Rate:  23%

Long-Term Mobility Program Participants' Annual Earned Income:  \$12,400

Partnerships: Boston Housing Authority, Cambridge Housing Authority, The Community Builders, City of Newton, JPAL, MIT, Harvard, Notre Dame



"Just when I was about to throw in the towel, I found EMPATH" - Josselyn

 **Fenway™
Forward**

formerly Fenway CDC

Steven Farrell, Executive Director

Jumana Rasheed-Rosenfield, Workforce Development Manager

Becca Hasko, Director of Development & Communications

March 25, 2026

Beth Israel Lahey Health 
Beth Israel Deaconess Medical Center

Organization Overview

Mission: to preserve the Fenway as a vibrant and diverse neighborhood by developing affordable housing, providing programs that enrich lives, and strengthening community voices.

Year One Strategic Plan Priorities: Raise organization's profile, update systems and databases, further incorporate listening into organizational structure, and grow workforce development.

Populations Served:

- Low-to-Moderate Income (LMI) Households
- Immigrant and multilingual communities
- Youth, Seniors, & Individuals with disabilities
- Formerly homeless residents

Leadership Representation:

- Diversity of the neighborhoods we serve
- Lived experience navigating housing instability, workforce barriers, and immigrant-serving systems



Neighborhoods Served:

Fenway/Kenmore, Beacon Hill, South End, Lower Roxbury

Proposal Summary (1 of 2): Fenway LEAP

Learning & Empowerment Advancement Program:

A workforce and financial stability initiative connecting neighborhood residents to employment pathways in Boston's major industries, including healthcare and administrative roles.

Program Location:

Community Learning Lab
109 Brookline Avenue (Fenway)
ADA-accessible community workforce hub

Serving residents who:

- Live in Fenway/Kenmore, Mission Hill, and Roxbury
- LMI households
- Face barriers to employment

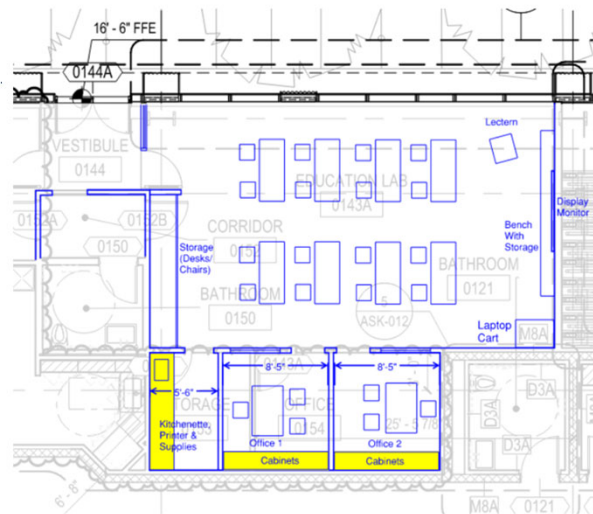
Estimated Reach

Year 1

- 150 residents recruited
- 120 complete workforce or digital skills training

By Year 3

- Up to 250 residents served annually



Proposal Summary (2 of 2): Fenway LEAP



Programmatic Strategies:

Evidence-informed workforce development services including:

- Digital literacy training
- Career readiness workshops
- Financial literacy education
- Employer engagement and referral partnerships

Primary Outcome Goals:

- 80% of participants placed in employment remain in their roles after 90 days
- 70% report increased confidence navigating employment systems
- 70% placed in training-related jobs

Funding Request: \$200,000 over three years:

- Year 1 – \$100K: Program launch, hiring Workforce Program Manager, recruitment of participants
- Year 2 – \$60K: Full program implementation & tracking
- Year 3 – \$40K: Program expansion & increased capacity

Sustainability: with our strong track record of diversified revenue, BIDMC's investment would allow us to maximize impact by attracting additional philanthropic support.

Community Investment Tax Credits (CITC)

- 2025: Began with over \$500K credits - utilized \$300K in credits.
- 2026 Projection:
 - \$200K credits rollover
 - Historic annual average award over the last five years: \$300K

What Else Should The CBAC Know?



Addressing the Hidden Barriers to Job Retention

Fenway LEAP will include a **Retention Fund** to address real-time crises that can jeopardize employment, including:

- Transportation costs before the first paycheck
- Laptop access for required training
- Car repairs needed to get to work
- MBTA passes for commuting
- Required equipment such as non-slip nursing shoes

Why This Matters

- Small financial barriers can quickly derail employment, particularly for residents living paycheck to paycheck.
- Addressing these barriers, Fenway LEAP aims to achieve **80% job retention after 90 days**, strengthening long-term economic stability for neighborhood residents.



Impact of BIDMC's Investment

Funding will establish a **community workforce pipeline** connecting neighborhood residents to Boston's medical and institutional employers, while strengthening economic stability as a key driver of community health.

Q&A



109 Brookline exterior and interior



Previous workforce development trainings held at our Community Studio



Beth Israel Lahey Health
Beth Israel Deaconess Medical Center

Jewish Vocational Service, Inc.

Sher Omerovic, Chief Program Officer

March 25, 2026

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Beth Israel Deaconess Medical Center

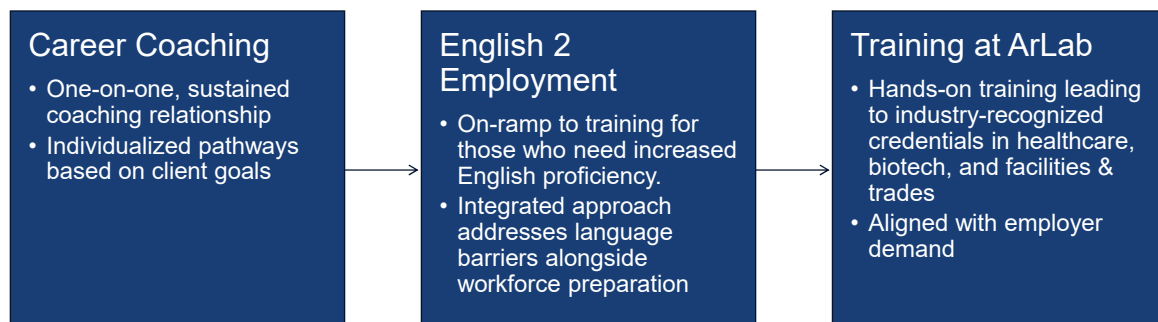
JVS Boston Overview



- **Mission:** To empower individuals from diverse communities to find employment and build careers, while partnering with employers to hire, develop, and retain productive workforces.
- Using evidence-based strategies, JVS assists people to remove barriers to financial independence by providing them with the skills needed to secure **a quality job with a family-sustaining wage.**
- **Who We Serve:** primarily, low-income individuals who are unemployed, underemployed, or earning low wages, living in Boston and surrounding communities
 - 60% of clients are not working at intake; 40% receive SNAP or TANF; 71% identify as people of color; 64% are women; 21% are parents; 60% are immigrants who represent 110 countries and speak 60+ languages.
- **Founded in 1938** to assist Jewish immigrants struggling to enter the American workforce and support their families. **Today**, the majority of our clients remain immigrants who are limited English speakers.
- Majority of our **executive leadership** are immigrants themselves, including our CEO, Chief Program Officer, Chief Development Officer, and others.

Proposal: Connect CBSA residents to jobs and financial security through high quality training and career coaching

Serve additional 20-25 individuals (\$200,000) or 10-12 individuals (\$100,000). Average cost per participant \$10,368



Combination of evidence-based strategies leads to strong employment outcomes

Anticipated outcomes based on most recent ArLab year

83%
Of participants
complete their
training program

86%
Of graduates secure
training-related
employment

\$20-27
Average wage
range for placed
graduates

2025 enrollments in ArLab training programs by neighborhood:

- Bowdoin/Geneva (Dorchester): 26
- Roxbury: 17
- Allston/Brighton: 14
- Fenway/Kenmore: 7
- Mission Hill: 4
- Chinatown: 2

70 Total



JVS is one of only 10 workforce development organizations in the U.S. to show a large, statistically significant earnings impact in a RCT

Using randomized controlled trial (RCT), in 2020, our English For Advancement (EfA) was found to have a substantial, statistically significant impact on participants' annual earnings in the second year after random assignment.

The same project also included non-RCT evaluation of outcomes in the Nurse's Aide training program and Bridges to College & Careers Biotechnology program, using administrative wage data from DUA.

In an earlier, 2010 longitudinal study conducted by Public Private Ventures, JVS was 1 of 4 job training programs evaluated nationwide using RCT, which found that JVS skills training graduates achieved significantly higher job placement rates, wage gains, and retention rates than their peers in a control group.

Q&A

Madison Park Development Corporation (MPDC)

Presented by:

Sandra Sierra, Assistant Director of Community Action

Yhinny Matos, Youth Workforce Manager

Carlos Taveras, Opportunity Employment Program Manager

March 25, 2026

Organization Overview (1 slide)

- Provide a brief overview of your organization, including:
 - **Mission:** To foster a vibrant, healthy Roxbury neighborhood that supports the well-being and advancement of the community. Founded in 1966 by Black community activists, as one of the nation's first community-led, nonprofit affordable housing developers
 - **Areas of Focus:** Affordable housing, economic mobility, arts & culture, direct services, including youth workforce and leadership development
 - **Population/Geography:** Low-income residents of color, primarily Nubian Square/Lower Roxbury, as well as Dorchester/Mattapan; approximately 2500 residents in 1300+ affordable housing units
 - **Youth Workforce:** Low-income youth of color ages 14-24 from Roxbury/Dorchester/Mattapan; many experience system-involvement, housing instability, mental health challenges, other barriers
 - **Leadership:** For all of its 60-year history, MPDC has been Black-led and specifically Black woman-led; board is 100% BIPOC (3/6 members MPDC residents); nearly 90% of senior leadership team BIPOC, reflective of neighborhood demographics

Proposal Summary: Project Overview

- **Project Overview:** To improve economic security among low-income youth/young adults of color in Roxbury by increasing access to MPDC's comprehensive suite of youth workforce development/post-secondary exploration opportunities, delivered through the Soheil Turner Youth Leadership Institute
- **Strategies:** Positive Youth Development-Informed youth workforce training/paid employment initiatives; post-secondary exploration and access including HBCU tour and post-secondary scholarship funds
- **Goals/Outcomes:** 1) Increase financial security among youth/young adults through paid employment and training opportunities; 2) Increase access to post-secondary opportunities through increased financial subsidy, including HBCU tour scholarships and MPDC's 2-4 year college/training scholarship program
- **Estimated Reach:** 150-175 youth/young adults

Proposal Summary: Budget & Timeline

	BIDMC	Other	Total
Director of Community Action (10%)	\$ -	\$ 14,635	\$ 14,635
Assistant Director of Community Action (15%)	7,632	7,632	15,265
Youth Workforce Manager (20%)	9,604	9,604	19,209
Youth Workforce Coordinator (40%)	<u>14,464</u>	<u>9,643</u>	<u>24,106</u>
Total Wages	31,700	41,514	73,214
Payroll Taxes & Fringe Benefits (30%)	9,510	12,454	21,964
Non-Salary Expenses:			
Scholarship Awards	65,000	-	75,000
Youth Stipends (\$15/hour X 25 hours/week X 6 weeks X 25 youth)	28,125	28,125	56,250
Tour/Travel/Lodging Fee (HBCU Tour)	35,700	-	35,700
Food (HBCU Tour)	2,000	-	2,000
Supplies (HBCU Tour)	2,500	-	2,500
Total Non-Salary Expenses	<u>133,325</u>	<u>28,125</u>	<u>171,450</u>
Total Direct Expenses	174,536	82,093	266,629
Admin Rate (15%)	<u>25,464</u>	<u>12,314</u>	<u>39,994</u>
Total Expenses	<u>\$ 200,000</u>	<u>\$ 94,407</u>	<u>\$ 306,623</u>

Note: Regarding Community Investment Tax Credit (CITC) eligibility, although our new 2026 allocation has not yet been received, based on remaining rollover credits, MPDC can offer at least \$37,500 in CITC covering up to \$75,000 of the requested \$200,000. However, should MPDC receive a similar allocation to 2025, CITC would be available for the full request.

Timeline:

- March-June 2026:** SYEP 2026 planning ; MPDC Scholarship Application Launch (March)
- June-August 2026:** SYEP Implementation; MPDC Scholarship Application Deadline (June)
- July-August 2026:** MPDC Scholarship Review, Selection and Payment Disbursement (up to 30-40 participants, eligible for up to 4 years)
- September 2026:** HBCU Tour Planning & Outreach Begins; new OEP cohort begins
- October 2026:** AYEP 2026-2027 Implementation Begins
- February-April 2027:** HBCU Tour takes place (February) and AYEP Concludes (April)

What Else Should The CBAC Know?

- MPDC is a trusted community institution with deep roots in Roxbury that go back 60 years
- Leader in not just City of Boston but state of MA in youth workforce development
- Responsive to neighborhood and participant needs
 - HBCU Tour
 - Driving training program
 - OEP Model
- Highly collaborative, strength of model is in network of partners

"I loved the fact I could visit so many colleges in just 3 days. It [HBCU tour] seems like so much work to put together in such little time, it was the best experience by far." - 2026 HBCU Tour participant

Q&A

Thank you!



MPDC Inaugural HBCU Tour, February 2024

Urban Edge



Building
Community
Since 1974

URBAN EDGE

Jessica Williamson | Director of Resource Development

jwilliamson@urbanedge.org

March 25, 2026

About Urban Edge



Mission & Vision

Urban Edge is dedicated to strengthening communities and families. Together, we build affordable housing and vibrant prosperous neighborhoods.

With its heart in Egleston and Jackson Squares, a vibrant, inclusive, and culturally and economically diverse area of Boston, Urban Edge works with others across the City of Boston and region to promote high quality, sustainable and affordable communities.

Who We Serve

- Low- to moderate-income households
- Predominantly BIPOC and immigrant communities
- Our portfolio of housing is spread across Roxbury, Dorchester, Jamaica Plain and Mattapan

Leadership & Community Connection

- Founded through grassroots organizing more than 50 years ago
- Multi-lingual community-based staff
- Deep resident engagement and leadership development
- Our board reflects the communities we serve with 70% living in our portfolio



Urban Edge Proposal Summary – Wealth Building



Project Overview

Urban Edge's wealth building programs support hundreds of participants each year, including community members seeking opportunities to improve their credit scores, become mortgage ready, and residents living within our portfolio of affordable housing.

Core Strategies

- Financial coaching and budgeting support
- Credit building education plus 1:1 counseling
- Matched Savings (2:1 incentive model), including matched down payment assistance
- Workforce pathways through partnership with JVS (Jewish Vocational Services)

Why it Works

Integrated, wraparound services complement our housing work by addressing financial stability alongside housing stability. By combining coaching, credit-building, savings, and workforce pathways, we tackle a key social determinant of health – reducing financial stress and improving long-term outcomes.

Population & Geography

- Racially and linguistically diverse residents who have historically lacked access
- Primary focus: where the majority of our residents live: Roxbury

Urban Edge Proposal Summary



How the Program Works (Real Impact)

Participants typically enter through our Credit Counseling Boot Camp, often by word of mouth or community outreach. In a 3-hour class, participants learn the fundamentals of credit and financial planning. Approximately 70% of Boot Camp attendees continue with ongoing one-on-one coaching.

Participants can enroll in matched savings programs, including down payment savings, with monthly contributions at either \$20, \$50 or \$100, and a 2:1 match. For those ready to purchase a home, who have enrolled in the down payment program, we accelerate savings timelines to help them act quickly in a competitive housing market.

Funds are securely managed through trusted financial partners, MIDAS Collaborative and Metro Credit Union and participants receive continuous support from Urban Edge staff, including the referrals to JVS for Career Services support – resume writing, application support, and introduction to training opportunities to advance careers and wages.

Dedicated staff and community engagement teams actively recruit residents through flyers, outreach, and direct referrals.



Urban Edge Proposal Summary



Projected Outcomes (July 2026 – June 2027)

8

Credit Counseling Boot Camp Sessions Delivered in English and Spanish

250

Credit Counseling Boot Camp Graduates

148

Matched Savings Participants

28

Career Counseling Intakes

High-level budget

Staff

\$70,000 – partial support for Urban Edge’s Community Program staff who deliver the above programming.

Program costs

\$15,000 – participant incentives, materials, staff training.

Marketing

\$3,000 – multilingual outreach to residents across Urban Edge and Nuestra housing communities.

Overhead

\$12,000 – proportional share of occupancy, technology, and administrative infrastructure.

Urban Edge can offer Community Investment Tax Credits (CITC) equal to 50% of the contribution, or \$50,000 in tax credits for a \$100,000 investment in this programming.

Q&A



[There will be 5 minutes for CBAC members to ask questions]

Discussion and Voting

Criteria to Consider

- Strategies in the proposal are evidence-based/informed
- Clear, measurable, and attainable goals
- Clearly defined population to be served, centering on the focus population(s) identified in the FY25 CHNA (*low-resourced, racially, ethnically, and linguistically diverse, youth, older adults, LBGTQIA+, families affected by violence and/or incarceration*)
- Strong history of working in one or more BIDMC CBSA neighborhoods
- Budget and timeline are reasonable to complete the proposed project

Next Steps

Next Steps

- BIDMC to notify applicants about their applications
- BIDMC to file FY25 Community Benefits report with the Office of the AGO
- **Future meetings:**
 - June 24, 2026 from 5-7 pm: via Zoom
 - October 7, 2026 from 2-4 pm (annual public meeting and grantee open house): in-person, BIDMC

Advisory Committee Members	2026			
	March 25	June 24	October 7	December 9
Flor Amaya	A			
Alexander Bonano	X			
Alexandra Chery Dorrelus	A			
Shondell Davis	X			
Pamela Everhart	A			
Angie Liou	A			
Jean McClurken	X			
Amy Nishman	X			
Sandy Novack	X			
Abby Oliveira	A			
Alex Oliver-Davila	A			
Cristina Rodrigues	X			
Leo Ruiz Sanchez	X			
Samantha Taylor	A			
Fred Wang	A			
BIDMC Staff - Ex Officio				
Lynne Courtney	X			
Pat Folcarelli	A			
Lauren Gabovitch	A			
Nancy Kasen	X			
Anna Spier	X			
Shelly Troubetaris	A			
LaShonda Walker-Robinson	A			

Key	
X	Participated in person, by phone, or by video
A	Absent